

Philanthropy Celebrated Panettas Honored with 2018 Distinguished Trustee Award

The annual Celebration of Philanthropy thanks those who support and partner with the Community Foundation for Monterey County (CFMC) to invest in healthy, safe, vibrant communities. On October 24 more than 300 donors, fund holders and friends gathered to take part.



(l to r) Steve Diamond, scholarship recipient Ismael Rocha, Marti Diamond, Allen Rocha

The highlight of the evening was the presentation of the 2018 Distinguished Trustee Award to Secretary Leon Panetta and Sylvia Panetta. The award honors those who have demonstrated philanthropic leadership in Monterey County.

Together the Panettas have made an incredible impact on the Central Coast. Though they

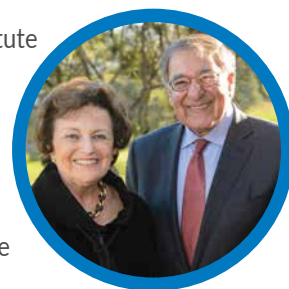
have been active on the national and international stage, they have never lost their sense of place and commitment to Monterey County.

“The Panettas are champions of civic engagement, and outstanding supporters of nonprofits advancing literacy, healthcare, public education and youth development,” noted Ken Petersen, CFMC 2018 Board Chair. “Their decades of leadership have inspired and encouraged others, and their commitment to excellence has served as a model for other organizations.”



(l to r) Board Chair Ken Petersen, Leon and Sylvia Panetta, President/CEO Dan Baldwin enjoy the Celebration of Philanthropy

The Panettas co-founded The Panetta Institute for Public Policy in 1997, a nonpartisan, nonprofit study center to inspire people to lives of public service and create opportunities for education and debate. One of Leon Panetta’s proudest accomplishments is the establishment of the Monterey Bay National Marine Sanctuary. Sylvia Panetta was key in launching the Monterey County Reads Consortium in 1997.



Sylvia and Leon Panetta

“We were deeply honored to receive the Distinguished Trustee Award because the work of the Community Foundation and the Panetta Institute is dedicated to the same goal – making the American Dream real for all people,” said Leon and Sylvia.

As award recipients, the Panettas designated a \$10,000 grant from the CFMC to the Panetta Institute for Public Policy. Long-time friend Mary Orradre noted, “Sylvia and Leon give new meaning to the phrase: ‘Giving Back.’” Read more at www.cfmco.org/Panettas.

Donor Advised Funds



Strategies for Tax-Wise Giving

The CFMC can help you give to causes you care about while gaining maximum tax benefit

Donor Advised Funds (DAFs)

This is a great way to claim a tax deduction now for supporting your favorite charities in the future. DAFs can be created quickly and easily with a gift of \$5,000 or more. And, with a gift of appreciated stock or mutual funds, you avoid paying capital gains tax on the sale of the stock and receive an immediate charitable income tax deduction for the full value of the asset.

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President's Message

As we approach the holiday season and the end of the year, it's natural to start thinking about what has transpired in 2018. People are justifiably nervous about the advent of a "new normal" in which hardline divisiveness and rough-edged public discourse rule the day. But there is something about working in philanthropy that keeps me optimistic. The CFMC sits at the center of a process in which resources flow from private donors to nonprofits supporting all aspects of life in Monterey County. This is exemplified through Monterey County Gives! (www.montereycountygives.com). We expect as many as 5,000 donors to utilize Gives! in support of 169 nonprofits. These are discretionary investments in neighbor helping neighbor, knowing that doing so will be good for us all.

In October, at our Celebration of Philanthropy, we presented Leon and Sylvia Panetta with the Distinguished Trustee Award. As only Leon can do, he gave a seamless acceptance speech that invoked Alexis de Tocqueville and his great work, *Democracy in America*, citing de Tocqueville's observations about the strength of community in America – people helping people – and how it



President/CEO Dan Baldwin shares CFMC's accomplishments at the annual Celebration of Philanthropy

sets our country apart. Secretary Panetta then pointed to the CFMC as a perfect example of this dynamic. It was a moment of pure pride for me, our board, staff, donors and the nonprofits we're here to serve.

Philanthropy can create these moments. Monterey County Gives!, or any other giving mechanism, provides the opportunity. Be thankful. Be generous. Be understanding. A Frenchman wrote about these qualities in 1835. A native son who became Secretary of Defense reminded us in 2018. Your community foundation is here to carry it forward.



Siembra Latinos Fund
OF THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Siembra Latinos Fund Launches

More than 100 supporters of the Siembra Latinos Fund (SLF) of the Community Foundation for Monterey County came together September 27 to launch the new Latino-focused philanthropic initiative. The word "siembra" means "to sow," and the fund was created by a group of local Latino leaders to empower the Latino community.

“ Our goal is to inspire giving by and for Latinos. We want to build a culture of philanthropy and grow opportunity for the Latino community in Monterey County. ”
– Blanca E. Zarazúa, Esq., SLF Advisory Board Chair

In August the fund awarded \$20,000 in grants to seven nonprofits: Alisal Community Arts Network for its Latin Jazz Orchestra, Central Coast YMCA for Diabetes Prevention Programs, Centro Binacional para el Desarrollo Indígena Oaxaqueño for an indigenous youth leadership program,



Siembra Latinos Fund guests joined Blanca Zarazúa to show their support

King City Boxing Club for activities for youth in King City, Life is for Everyone, Inc. for its STEM/science club, Loaves, Fishes & Computers for a digital literacy workshop in Gonzales and Palenke Arts for art classes in Seaside.

The mission of the SLF is "To inspire philanthropy and cultivate strong and vibrant Latino communities in Monterey County." Its vision is, "Healthy, Safe and Engaged Latino Communities." Learn more at www.cfmco.org/SLF.

Leverage your gift to the Siembra Latinos Fund through Monterey County Gives! All donations received through midnight December 31, 2018 will receive a percentage match at www.mcgives.com.



Record Year for Scholarships

\$1.3 Million Awarded

2018 was another record year for scholarships. This year the CFMC awarded over 375 scholarships from 50 funds totaling more than \$1.3 million.

This significant growth is due in large part to the commitment of local employers to supporting the educational aspirations of their employees and their families. Taylor Farms chose to partner with the CFMC this year to manage its scholarship awards. CFMC staff worked with Taylor Farms to collect and review applications, facilitate a committee to select the winners, and manage payments of \$100,000 in scholarships to 20 children of Taylor Farms employees.

Another large contributor is the growth of College Futures Monterey County, which supports low-income, first-generation students with college success services and two-year scholarships. The CFMC



Bruce Taylor, Paola Estrada Tena, and Mark Campion



The Taylor Farms Scholarship Fund awarded \$100,000 in scholarships in 2018 to 20 students who are children of Taylor Farms employees

awarded 125 scholarships totaling \$420,000 to students attending the college or university of their choice.

Students can apply to over 30 scholarship funds through the online application system beginning January 9, 2019 at www.cfmco.org/ScholarshipApp. For information about starting a fund, please contact Christine Dawson at 831.375.9712 or visit www.cfmco.org/scholarships.

New Funds Created*

The CFMC manages more than 500 funds established by individuals, families, businesses and nonprofit organizations. Learn more at www.cfmco.org/WaysToGive.

Agency Stewardship Funds

- Conservancy for the Range of the Condor Stewardship Fund
- Harmony At Home Ending Violence & Building Families Stewardship Fund
- Park It! Stewardship Fund
- Maury Richmond Scholarship Fund
- Youth Music Monterey Stewardship Fund

Company Fund

- Monterey Pacific Company Fund

Donor Advised Funds

- Joey Dewitt Astin Memorial Fund
- Stephen V. Davies Family Fund
- California Rodeo Salinas Fund
- Weston Call Fund for Big Sur
- Global Student Leadership Fund
- David G. Huey & Carla S. Hudson Family Fund
- McHenry Family Fund
- Kim and Steve McIntyre Fund



Galen and Brian Call created the Weston Call Fund for Big Sur in memory of their son

- Neumeier Taylor Foundation Fund
- Vanderbilt Charitable Fund
- Richard & Cindy Zoller Silver Family Legacy Fund

Scholarship Funds

- American Culinary Federation Monterey Bay Chapter-Marc H. Vadrines Scholarship Fund
- Whitney Elizabeth Grummon Memorial Scholarship Fund
- Men's Golf Association at Quail Lodge Scholarship Fund
- Steven Paul Schmidt Scholarship Fund

- Scholarship Fund for Homeless Women Nan Borreson and Fred Terman Scholarship Fund
- Taylor Farms Scholarship Fund

Special Program Fund

- James Irvine Foundation Salinas Leadership Fund

Legacy Society

We thank those who have included the CFMC in their estate plans.

New Members

- Nancy Ausonio
- Joseph and Elizabeth Heston
- Vince Huth
- Dr. George McAfee
- Leslie Mulford
- Steven Paul Schmidt

Please visit www.cfmco.org/Legacy to learn more or for a full list.

*Funds created since March 2018

The Gomez Family

Honoring Their Parents' Memory

Trinidad and Lupe Gomez epitomized the American Dream. Both were from migrant farmworker families who followed the crops in California before settling in Gonzales. "Trini" left school at the age of 12 to work the fields and help support his family. Lupe also had to drop out of school to contribute to her family's needs. After a stint in the Army, Trini returned to Gonzales to find that his little sister's best friend had grown to a beautiful young woman. Trini and Lupe were married in 1946.

Their life together can be defined by a love of agriculture second only to a deep love of family. Trini and Lupe's generosity extended beyond their family circle. Even in the lean years, Lupe always found enough to donate to those requests that seemed to fill the mailbox.

“ Our gifts are an expression of the values our parents exemplified. We give to causes and communities they cared about in the Salinas Valley as a way to honor their memory. ” - Trinidad and Patricia Gomez

Upon Trini's passing in 2013, Lupe created the Trinidad Gomez Family Fund. She particularly liked the idea that the fund "will always be there honoring him and will give back to the



(l to r) The Gomez children: Greg Gomez, Mary Ellen Ferguson, Patricia Gomez, Trinidad Gomez honor their parents' memory through giving

community." When Lupe passed away in 2017, the children renamed the fund the Trinidad and Lupe Gomez Family Fund.

The family uses the fund to support activities in the areas that shaped their parents' lives – agriculture and family. "Community foundations are good stewards of the funds invested and a very good resource for knowing the agencies serving the community's needs," said their daughter Patricia Gomez. The fund is truly a family affair. The four children look forward to continuing to work with the CFMC in recommending grants.

Neighborhood Grants Program Surpasses \$1 Million Granted

\$50,000 Awarded in 2018 to 15 Groups

The CFMC's Neighborhood Grants Program (NGP) reached a \$1 million grantmaking milestone this summer. NGP supports residents who come together to improve their communities. Since the program's inception in 1997, \$1,025,000 has been awarded to volunteer-led groups. This year, 15 grassroots groups were selected to receive financial support and assistance in organizing activities in their neighborhoods. The total amount awarded was \$50,000, with grants ranging from \$1,500 to \$4,000.

Friends of Marina Parks was one of the organizations that received NGP funding. An 8-year-old Marina girl, Lola Tackett, approached her mother about wanting better parks for her community. As a result of her inspiration, volunteers began cleanups of nearby parks, painting, weeding, planting flowers and general maintenance improvements.



Friends of Marina Parks organizes park cleanups

"Through the eyes of a young girl, our local community is realizing the benefits of putting dreams into action," said Amy Tackett, who co-founded Friends of Marina Parks with her daughter, Lola.

2018 NGP Recipients:

Ballet Folklorico Tapatio • Castroville Midnighters Car Club • Friends of Marina Parks • Gonzales Youth Guardians • Kalpulli Oceloyotl • LULAC Youth Council #2087 • Monterey Peninsula NAACP Youth Council • Noche Bohemia • Padres de Niños Especiales del Sur del Condado • Renacer En Alegria • Salinas Youth LULAC #709 • Team Villa Boxing • Tu Puedes King City • United Castroville Neighbors • Yaocuahtli Danza Cultural



Arts groups are among NGP grantees

"The Community Foundation has a long history of commitment to resident-led groups invested in improving their communities," said Laurel Lee-Alexander, CFMC Vice President of Grants and Programs. Find details at www.cfmco.org/NGP.

Grantee Stories

Opportunity & Organizational Development Grants

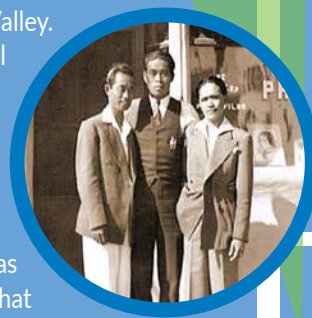
The CFMC is responsive to community needs through its Opportunity and Organizational Development grant programs. Opportunity grants support new and emerging efforts and unexpected time-sensitive needs. Organizational Development grants can strengthen an entire organization's effectiveness and efficiency. This year, nine organizations received Opportunity grants and 13 received Organizational Development grants.

Organizational Development grants are used for a wide variety of purposes, from first-time board retreats to strategic planning, executive coaching and transitions, communications development, and more. These one-time grants generally provide support of \$5,000 or less, and applications are accepted throughout the year. Learn more at www.cfmco.org/grants.

Asian Cultural Experience Salinas is a community of people whose stories await telling. Waves of immigrants and those looking to work hard have found their way to the Salinas Valley. A \$5,000 Opportunity grant will support the "Story of Salinas Chinatown" exhibit which recounts the lives and contributions of three founding ethnic groups: the Chinese, Japanese, and Filipinos, as well as Latino families and businesses that arrived in the mid-20th century. The exhibit will be on view at the historic Harvey House (First Mayor's House) in Salinas in spring 2019.

"Since the 1870s, Salinas Chinatown has been a marginalized community. This exhibit will help Salinas Valley residents and students understand the historical contexts for changes that the Chinatown neighborhood has undergone since its founding, as well as more recently," said Jean Vengua, Co-Chair of Asian Cultural Experience.

Photo courtesy FAX Collection (Filipino American Experience Project Collection)



Community Emergency Response Volunteers (CERV) of the Monterey Peninsula

When disaster strikes, prior preparation can save lives. CERV wants to make sure all members of our community have a plan. They will use a \$4,500 Organizational Development grant to engage nonprofits serving people with disabilities in preparedness training. "There is an urgent need to increase awareness, planning and collaboration among nonprofit organizations representing people with access and functional needs," said Lee Whitney, CERV President.

Regeneration – Pajaro Valley Climate Action

is working to develop climate justice leaders. An Opportunity grant will support two California State University, Monterey Bay students who will promote free solar installations on homes; develop a program promoting adoption of a plant rich diet to help reduce carbon footprint and conduct surveys and outreach to guide future initiatives and influence policymakers. "Our project addresses the need to identify and equip young environmental justice leaders to respond locally to the global problem of climate change to inspire individual and community-wide participation," said Nancy Faulstich, Director.



Giving Strategies, from page 1

With higher standard deductions in 2018, some donors are opting to "bundle" their giving. This means donating two or more years' worth of giving at one time, and claiming the charitable deduction in the year of the gift. Donors then recommend grants from the fund in future years, while claiming the standard deduction.

Gifts of Real Estate or Appreciated Stock

Both are good options to benefit the donor with an income tax deduction and capital gains tax savings.

IRA Charitable Rollover

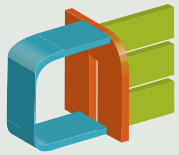
If you are 70 1/2 or older, you could transfer up to \$100,000 annually and reduce the taxable balance of the IRA in your estate. You or your spouse can each gift up to \$100,000 from your IRA accounts to the CFMC to benefit your favorite nonprofits. Gifts made from your IRA are not reportable as taxable income and

qualify toward your required minimum distribution (RMD), which can lower your income and taxes. Though gifts to donor advised funds are not eligible, you can contribute to designated, agency, scholarship or field of interest funds at the CFMC. An IRA charitable rollover may also be made to benefit participating nonprofits through Monterey County Gives!

Charitable Remainder Trusts & Charitable Gift Annuities

Both offer tax deductions and income for life (a portion of which is tax free). The remainder creates a fund to benefit any nonprofit you choose.

Leverage Your Gift through Monterey County Gives! through any of these vehicles or directly at www.montereycountygives.com. (See page 8) For more information, call 831.375.9712 or visit www.cfmco.org/WaystoGive.



center for nonprofit excellence

COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Strengthening Nonprofits

Board Resources

Nonprofit organizations depend on their boards of directors to provide key direction and tangible support to deliver on their mission. To connect potential board members, the Center for Nonprofit Excellence brought together 15 nonprofits with 25 community members at a networking reception in Salinas.

One nonprofit leader remarked, "We made connections with someone who expressed interest in being on our board, as well as with a potential volunteer." To access a list of local nonprofits with board openings, contact CNE at cne@cfmco.org. Free resources to assist with nonprofit board development are available at www.cfmco.org/toolkits.

Donor Development Institute

What would it mean for our area's smaller, more grassroots nonprofits to develop effective individual donor strategies? Eleven

groups have embarked on our year-long Individual Donor Development Institute to find out. Through in-person training, peer support and online coaching from Jeff Pinzino of the Grassroots Institute for Fundraising Training, these groups will learn and implement the four basic principles of grassroots fundraising. These include: staying mission driven, building relationships with people of various income levels and life experiences, diversifying income streams and recruiting a team.

Many participants are already getting comfortable building relationships and asking individuals for support, including an Aromas woman who celebrated a donor's "yes" when asking for a donation to build a local dog park. The energy in the room was palpable when she shared her enthusiasm with the group and it became a learning moment. Participating groups include:

- ALBA - Agriculture and Land-Based Training Association
- Aromas Team: Aromas Grange, ACCF, Aromas Eagles, Neighbors Helping Neighbors
- CASA - Court Appointed Special Advocates for Children of Santa Cruz
- Ceiba Public Schools
- Central Coast Quality of Life Project
- City of Watsonville Environmental Science Workshop
- Filipino Cultural Center
- Independent Transportation Network Monterey County
- Loaves, Fishes & Computers
- Mesa Verde Gardens
- Watsonville Nature Center, City of Watsonville

Smaller nonprofits benefit from Individual Donor Development Institute training



Grant Opportunities

The CFMC invites grant applications addressing the Children & Youth Development and Health & Human Services program areas in the 2019 grant cycle. Approximately \$1 million is available to grant. Important dates are listed below.

Grantseekers are invited to learn what's new for 2019 by viewing or listening to the information session presentation on our website. New applicants are especially encouraged to attend an in-person session on January 9 or 10 to better understand our grant guidelines and discuss frequently asked questions. Learn more at www.cfmco.org/CommunityImpact.

2019 Spring Application Deadlines & Important Dates

Pro Bono Consulting from the Stanford Alumni Consulting Team - 1/25
Visit www.cfmco.org/consulting for details.

Community Impact Info Session (Salinas) - 1/9

Community Impact Info Session (Monterey) - 1/10

Community Impact Grants (\$15,001-\$50,000) by 5 p.m. on 2/1

Community Impact Small Grants (\$5,000-\$15,000) by 5 p.m. on 3/1

Opportunity & Organizational Development Grants - Accepted year-round.



Children & Youth Development



Health & Human Services



Environment & Animal Welfare



Arts, Culture & Historic Preservation



Community Development

Please review our grant guidelines before applying at www.cfmco.org/Grants, or call 831.375.9712.

The Power of Endowment

The Robert and Virginia Stanton Endowment



The Stanton name is known in Monterey County for providing architectural beauty and charitable vision. Robert Stanton was a UC Berkeley-trained architect who left his enduring mark in the design of such buildings as the Monterey County Courthouse in Salinas, the King City Joint Union High School Auditorium, City Library and City Hall.

Robert and his wife, Virginia, also created a charitable legacy that continues to build and give well beyond the \$3.5 million gift that started the Robert and Virginia Stanton Endowment Fund of the Community Foundation for Monterey County in 1994.

After her husband's passing in 1983, Virginia Young Stanton began working with the CFMC to honor her husband's trade and preserve his legacy. She created an endowed fund from a gift of real estate. Since the creation of the fund, more than \$5 million has been awarded. While Virginia Stanton named preferred agencies and projects as beneficiaries, others may be funded at the recommendation of the CFMC Board and the Stanton Committee.

“ An original gift of \$3.5 million has granted over \$5 million and the fund balance is more than the original gift. That's the power of endowment. – Dan Baldwin, CFMC President/CEO ”

The Monterey Museum of Art has benefited greatly from the Stanton's generosity. "The Monterey Museum is sincerely grateful for the support of the Robert and Virginia Stanton Endowment. It is tremendously important in helping us present our exhibitions and programs within facilities that are safe, accessible, comfortable, and aesthetically pleasing to visitors," said Stuart Chase, the museum's Executive Director.

Nearly \$200,000 was granted in 2018 from the Robert and Virginia Stanton Endowment:

- American Red Cross of the Central Coast for a Red Cross services vehicle
- El Sistema USA/Salinas, Inc. (Youth Orchestra Salinas) for a music education program for K-12 students
- Monterey Museum of Art for pre-development capital project and assessments for future expansion
- Monterey Symphony for education initiatives for the 2018-19 season
- Natividad Medical Foundation for Alebrijes & Kids: Healing Art for Children program
- South Monterey County Center for the Performing Arts for upgrades to theater lighting system
- Pacific Repertory Theatre for capital improvements of the Golden Bough Playhouse
- Youth Music Monterey to provide free instruction for youth through South County Strings

Grants Awarded
over \$5 million

1994
Original Gift
\$3.5 million

2018
Fund Balance
over \$4.6 million

Ken Petersen, *Chair*
Birt Johnson, Jr., *Vice Chair*
Teri Belli, CPA, *Treasurer*
Jeff Eikenberry, *Secretary*

Betsy Buchalter Adler
Ida Lopez Chan
Nolan Kennedy
Steve McGowan
Fred Meurer
Bill Mitchell
Erica Padilla-Chavez
Betsey Pearson
Michael Reid
Bill Sharpe
Loren Steck
Abby Taylor-Silva
Jan Vanderbilt
Maija West
Kenneth Wright

Daniel R. Baldwin, President/CEO



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 Tax-Wise Giving
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 Grantee Stories

Big Sur Relief Fund final check presentation at Nepenthe (l to r) Christine Dawson, Kendra Morgenrath, Shane Forster, Cheryl Goetz, Kirk Gafill, David Fink, Marcus Foster, Jake Goetz, Brian Thayer, Martha Karstens

NOTE: The Monterey Fireman's Charitable Association Fund is accepting donations online at www.cfmco.org/mcfca to aid victims of the Camp, Woolsey & Hill fires.

Here for Good
Community Foundation
 for Monterey County

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HEALTHY, SAFE, VIBRANT Communities

women's fund
 of the community foundation
 for monterey county

SAVE THE DATE
Thursday, May 16, 2019

14th Annual
Women's Fund Lunch

11 a.m. - 1:30 p.m.
 Hyatt Regency Monterey

Join more than 500 people seeking to empower local women and girls. This annual event inspires action. More than \$100,000 was raised in 2018 from those who attended the luncheon for Girls' Health in Girls' Hands scholarships.

Interested in Sponsorship?

Please contact Mackenzie Little at 831.375.9712 x111.



2018 Emcee Erin Clark and speaker Sarah Hirsh Bordo

Monterey County Gives!
 Nov. 8 – Dec. 31, 2018
 Leverage your year-end giving

Boost your year-end donations through Monterey County Gives! This year-end campaign inspires local philanthropy and benefits a wide array of Monterey County nonprofits. More than \$16 million has been granted since 2009. Local businesses, foundations and individuals have contributed more than \$450,000 to an overall matching fund to spur donations.

This year 169 agencies are participating. So, visit www.mcgives.com and Give Big!

Gives! is a partnership between the Community Foundation for Monterey County, the Monterey County Weekly and the Monterey Peninsula Foundation with generous support from the Neumeier Poma Investment Counsel, Cannery Row Company, David and Lucile Packard Foundation and the Colburn and Alana Jones Foundation at the CFMC.

