



THE

POWER

OF

PARTNERSHIP

# 2014 ANNUAL REPORT



## The Power of Partnership

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## VISION

Healthy, safe, vibrant  
communities

## MISSION

To inspire philanthropy  
and be a catalyst  
for strengthening  
communities throughout  
Monterey County

## QUICK FACTS

**\$13.8  
MILLION**

contributions  
received

**27**

new  
funds created

**\$178  
MILLION**

assets grew  
2.73% to a record  
\$178 million

**\$11.3  
MILLION**

record grants, awards  
and scholarships  
approved for  
distribution to 415  
grantees

**4.4%**

total return on  
invested assets in  
the pooled  
endowment portfolio

**1.3%**

total operating  
expenses were 1.3%  
of total assets

**\$125  
MILLION**

in cumulative  
grantmaking since  
1981



FROM THE CHAIR & PRESIDENT/CEO



**"TRUST & PARTNERSHIP**

**GO HAND-IN-HAND."**

- Dan Baldwin

Richard Green

Partnerships are fundamental to the Community Foundation for Monterey County (CFMC). From our inception, the ability to grow and create impact required considerable trust in the concept of the CFMC and the people behind it. Trust and partnership go hand-in-hand. Our partnerships have traditionally included individuals and families as they work to fulfill a philanthropic vision as well as Monterey County nonprofits and the people they serve, whether through grantmaking or the Center for Nonprofit Excellence.

The "Power of Partnership" revealed itself in 2014. We now partner with a region, South Monterey County, where community leaders formed the Southern Monterey County Foundation, an affiliate of the CFMC. This is our first affiliate fund, and we expect it won't be our last. The power of this partnership is driven by the word "local." Local leaders talking to their friends and colleagues about philanthropy, and local impact through a grant process they oversee.

2014 also saw a deepening of our partnership with CFMC donor advisors, resulting in a record year of grantmaking. Several donor advisors converted their funds from endowed to non-endowed, allowing them more capacity for immediate grantmaking. Not only did these funds see a large increase in grants, but the fund holders added to them at levels they had not done so previously. Part of the attraction of working with the CFMC is being exposed to the work of Monterey County nonprofits. Donor advisors are co-investing on applications to our Community Impact grant program at an ever-increasing rate.

Record assets. Record grant totals. Record impact. None of this is possible without partnerships. As you read this annual report and learn more about the way our grants have helped nonprofits better serve their communities, the enthusiasm our partners in philanthropy have for changing lives, and our commitment to being good stewards of the assets entrusted to us, please don't forget that while our successes are many, Monterey County's needs are great. As we go forward, more partnerships, and the power they engender, will be required.

Gail Delorey  
Board Chair 2014

Daniel R. Baldwin  
President/CEO





# The Power of Partnership



## DONORS + NONPROFITS + FUNDERS + ADVISORS

People, resources and ideas coming together make stronger communities. The CFMC serves as a catalyst, leveraging and stewarding philanthropic resources and relationships for the greater good.

The CFMC inspires philanthropy, connecting **donors** with their philanthropic vision. The foundation facilitates customized charitable solutions for each individual, family or business. Current fund holders co-invested nearly \$500,000 in donor advised grants to support the important work being done by local nonprofits.

The CFMC helps **nonprofits** thrive. With more than \$11 million granted in 2014 to 415 nonprofits countywide and beyond, arts programs were enhanced, beaches were made cleaner, families received counseling, support and services, animals were protected and youth were empowered.

The Center for Nonprofit Excellence partners with local agencies beyond grantmaking, offering workshops, consulting and resources to strengthen organizational effectiveness.

The CFMC collaborates with **funders** like the Peggy and Jack Baskin Foundation, Claire Giannini Fund, Monterey Peninsula, David and Lucile Packard and Nancy Buck Ransom Foundations to bolster investment in local initiatives.

By working closely with **professional advisors** such as CPAs, estate planning attorneys and wealth managers, legacies are created and clients' wishes are fulfilled.

Thank you to all our donors, nonprofit organizations, volunteers and professional advisor partners for all you do to help create **"Healthy, Safe, Vibrant Communities!"**



Guests enjoy annual Women's Fund luncheon

NONPROFITS



Funding partners celebrate

ADVISORS



DONORS



Girls' Health in Girls' Hands

FUNDERS



  
HEALTHY,  
SAFE,  
VIBRANT  
COMMUNITIES



Richard Green



**"YOU EAT LOCAL,**

**SHOP LOCAL,**

**WHY NOT GIVE LOCAL?"**

- Jay and Ann Brown

SMCF board members and supporters gather: **Back** (l to r): Vince Lopez, Tina Starkey Lopez, Jerry Bumbalough, Lynn Miller, Mikel Ann Miller, Kurt Gollnick, Rich Casey, Mike Orradre, Rob Cullen, Vivien Cullen, Allie Cullen; **Front** (l to r): Paulette Bumbalough, Marvin Borzini, Grace Borzini, Mary Orradre, Ann Brown, Sharon Casey, Holly Casey. 100% of the SMCF Advisory Board members are also Founding Family Members.

## A SHINING EXAMPLE OF PARTNERSHIP

An affiliate fund is perhaps the ultimate example of partnering with local donors to enhance philanthropy. The CFMC's first affiliate fund, the Southern Monterey County Foundation (SMCF) was launched in 2014. Formed by an advisory board of local residents in partnership with the CFMC, the name was chosen to represent the area served, which includes King City and the communities south to the county line.

Affiliate funds provide an opportunity for donors to pool philanthropic resources and be a part of the investment portfolio of the CFMC, while they direct grants based on their local knowledge. The CFMC provides financial stewardship, administrative support and the services of a fully accredited community foundation that is held to rigorous national standards.

In its first year, the SMCF granted \$27,500 to eleven nonprofit organizations: Campaign for the Preservation of Mission San Antonio de Padua, Community Food Pantry of King City, Girls Inc. of the Central Coast, Monterey County Agriculture & Rural Life Museum, Rancho Cielo, Salinas Valley Fair, Salvation Army King City, San Bernardo Grange, SMCERTA, Sol Treasures and Youth Music Monterey.

### Founding Family – Neighbors Helping Neighbors

The SMCF advisory board has a deep understanding of needs in the region, and is inviting partners to provide annual grants to organizations working to make Southern Monterey County communities better places for all. As part of its effort to build a permanent philanthropic resource, the SMCF is asking community members to become part of the Founding Family. With a commitment of \$5,000, half of which goes to the endowment, half of which supports immediate grantmaking, Founding Family members help the SMCF make a difference now and for future generations.



**"I CAN DO THINGS YOU CANNOT, YOU CAN DO THINGS I CANNOT; TOGETHER WE CAN DO GREAT THINGS. "**

-Mother Teresa

Through June, 2015 the SMCF has 19 Founding Family members, made up of individuals and companies: Pier and Norma Azcona, Cody and Mandy Bassetti, Marvin and Grace Borzini, Jay and Ann Brown, Jerry and Paulette Bumbalough, John and Janet Buttgereit, Holly and Bill Casey, Richard and Sharon Casey, Robert and Allie Cullen, Susan and David Gill, Joe and Linda Grebmeier (In memory of Ralph & Edith Grebmeier), Nathan M. and Cindy Holaday, Vince and Tina Starkey Lopez, Lynn and Mikel Ann Miller, Arvid and Ann Myhre, Mike and Mary Orradre, John and Barbara Pekema, Chevron and Scheid Vineyards.



NEARLY  
\$1 MILLION  
GRANTED



Women's Economic Security grantees



Girls' Health in Girls' Hands Summit



Women's Fund Luncheon

## CHANGING LIVES OF WOMEN & GIRLS



The Women's Fund brings people, resources and ideas together to improve the quality of life and increase opportunities for women and girls. Along with donors and community partners, the Women's Fund encourages collaboration and provides funds to create opportunities for women to empower themselves.

The Women's Fund invests in two key areas: **the future of girls** and **women's economic security**. Nearly \$1 million has been granted since 2003 to encourage local women and girls to realize their potential and make our communities stronger.

### The Future of Girls – Girls' Health in Girls' Hands

This girl-led movement for health empowerment gives girls in Monterey County a voice in shaping their futures. It is a partnership between six nonprofits, their leadership and staff and the girls themselves. Over 550 girls from 22 program sites are now participating in health education and leadership training and more than 1,500 girls have been impacted (*see page 5*).

WHEN A  
WOMAN THRIVES,  
HER FAMILY THRIVES,  
WHEN A  
FAMILY THRIVES, THE  
COMMUNITY THRIVES.

### Women's Economic Security – WES Initiative

The Women's Economic Security (WES) initiative was created in 2014 to help low-income mothers access the education, skills training and support they need to secure family-sustaining wages. Using local data, national models and best practices, the CFMC created a two-generational approach to make a meaningful difference to help break the cycle of poverty. The ACTION Council for Monterey County will implement the three-year project, beginning in 2015.

Our vision is that every woman and girl has what she needs to be healthy, confident and able to fulfill her dreams. Investing in women and girls creates a better future for the entire community.

When a woman thrives, her family thrives, when a family thrives, the community thrives.

## WOMEN'S FUND ENDOWMENT- WHY STOP HERE?

People who want to improve the lives of women and girls in our communities have contributed to the fund in many ways. Donors, committee members, partner organizations, and funders have come together to make an important difference. In May 2015, the Women's Fund achieved its goal of raising \$1.5 million to meet changing needs over time. We still welcome donations to help the fund grow further and impact even more people for years to come.

**The Power of Endowment is that  
a gift made today will benefit  
women and girls in Monterey County forever!**

To learn more or contribute,  
visit [www.cfmco.org/womensfund](http://www.cfmco.org/womensfund)





Photos by Richard Green

GHGH youth find their voice

## GHGH PARTNERS WITH SIX GIRL-FOCUSED PROGRAMS



Summit participants chose social and emotional health as their priority issue

## GIRLS' HEALTH IN GIRLS' HANDS



The Girls' Health in Girls' Hands (GHGH) initiative helps girls, nonprofit staff, agencies and funders to be stronger together than they are apart. GHGH is a countywide collaborative founded in 2012 to help girls ages 11-18 in Monterey County gain better access to health information, leadership skills and advocacy training. Hundreds of girls have developed tools to help influence positive changes at their schools and in their communities.

### Nonprofit Partners

GHGH is comprised of six organizations that deliver girl-focused programs countywide. **Boys & Girls Clubs of Monterey County, Girls Inc. of the Central Coast, Monterey County Health Department, Monterey County Rape Crisis Center, Planned Parenthood Mar Monte** and the **YWCA Monterey County** have come together to work towards a unified voice for girl-led change. Agency staff support girl leaders in health advocacy initiatives, share resources and implement enhanced programming.



"WITHOUT ACTION ON  
SOCIAL AND EMOTIONAL  
HEALTH, YOUTH WON'T  
BE ABLE TO SURPASS  
CHALLENGES AND GET  
THE SUPPORT THEY  
NEED TO SUCCEED"

—GHGH 2014 Summit Participant

### Girl leaders

Girl leaders have stepped up to represent their program as part of the Girls Leadership Network (GLN). They organize summits with health workshops and physical activities and facilitate advocacy campaigns related to priority health issues, as defined by girls themselves.

In 2014, GLN members organized the "Post A Smile" campaign to boost self-esteem by posting positive messages on sticky notes. The action involved over 75 girl leaders and 10 schools countywide. It raised awareness of social and emotional health issues of youth who lack access to

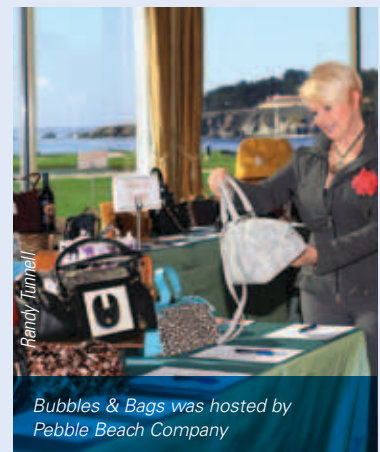
the resources needed to deal with life's difficulties. Without the GHGH initiative, the collaboration among girls from different schools and programs would not have been possible.

**Funding Partners** Financial support from other foundations has led to more powerful programming and leveraged the CFMCs philanthropic resources. More than \$300,000 was awarded in 2014. We are grateful to the Peggy and Jack Baskin Foundation, Claire Giannini Fund, Monterey Peninsula Foundation, David and Lucile Packard Foundation and the Nancy Buck Ransom Foundation for their continued support of this important movement.

## BUBBLES & BAGS

The inaugural Bubbles & Bags Silent Auction, held in November at the Beach & Tennis Club at Pebble Beach, was a huge success. The event raised an impressive \$38,000 to support GHGH. More than 300 attended to purchase new, gently loved and vintage bags generously donated by community members. Bubbles & Bags was coordinated by a volunteer committee co-chaired by Judie Profeta and Stephanie Harkness.

*Bubbles & Bags was hosted by Pebble Beach Company, and sponsored by Augustina's, Illusions of Grandeur, Natalie Baroni Jewelry Designs and the Schaeffer, Present & Stoffers Investment Group of RBC Wealth Management. Additional support was provided by 65° Magazine, Comerica Bank, GBG, Jane Emison, Mann Packing, and Monterey Aesthetics Center.*



Bubbles & Bags was hosted by Pebble Beach Company



## Partnering with Donors



**"(GIVING) JUST SEEMS**

**LIKE THE RIGHT THING**

**TO DO."**

- F. Robert (Bob) Nunes

### ***DISTINGUISHED TRUSTEE*** **AWARDED TO F. ROBERT NUNES**

The CFMC annually honors an individual or couple who have demonstrated exceptional generosity and commitment in supporting local nonprofit agencies. In 2014 the award was presented to F. Robert "Bob" Nunes for his philanthropic leadership. "Bob is a fitting recipient. He gives from the heart to help those most in need," said CFMC 2014 Board Chair, Gail Delorey.



**"HE GIVES FROM  
THE HEART TO HELP  
THOSE  
MOST IN NEED."**

- CFMC 2014 Board Chair,  
Gail Delorey

Bob established his donor advised fund at the CFMC in 1996. He has made multiple gifts to agencies including the SPCA for Monterey County, United Way Monterey County and Meals on Wheels. Though donor advisors at the CFMC can grant to nonprofit organizations worldwide, Bob prefers to keep his giving local. In his own words, he wants to help "the vulnerable, the very old, the very young, the very poor, the very sick and animals." Bob's giving philosophy is simple. "It just seems like the right thing to do."

### **CFMC TRUSTEE AWARD HONOREES**

2014 – F. Robert Nunes	2000 – William and Nancy Doolittle
2013 – Warren Wayland	1999 – Jim and Jeri Gattis
2012 – David and Laurie Benjamin	1998 – Patricia Tynan Chapman
2011 – Mike and Mary Orradre	1997 – Margaret Owings
2010 – Bob and Sue Antle	1996 – Basil E. Mills
2009 – Julie Packard	1995 – David Packard
2008 – Sherrie McCullough	1994 – Harriet R. Thurmond, Sarah T. Hermann
2007 – Maggie Downer	1993 – Francis H. Cislini
2006 – Clint and Dina Eastwood	1992 – Marshall Steel, Jr.
2005 – Ed and Terry Haber	1991 – Virginia Stanton, Gordon Paul Smith
2004 – Michael McMahan Neal McMahan Marsha McMahan Zelus	1990 – Ruth P. Fenton
2003 – Davis Factor, Jr.	1989 – John A. McCone
2002 – Joanne Taylor Johnson	
2001 – Hilton and Roberta Bialek	





## A FORCE FOR GOOD

### NANCY AUSONIO

Nancy Ausonio is a down-to-earth dynamo. She is a role model for others who seek to make a difference. Nancy is not afraid to “dig in” on behalf of her community. Whether it’s beautifying her hometown of Castroville by gardening on clean up day, serving as a board member for a nonprofit organization, or contributing to worthwhile causes, she likes to give back any way she can. From the Artichoke Festival to the local Rotary Club, Nancy can be found where things need doing. “I always just wanted to help somebody,” she explains.

#### Giving Time and Treasure

Nancy gives to make a difference, offering both her time and money. She is a founding board member of the Foundation for Monterey County Free Libraries, and is President of the Friends of the Andy Ausonio Library, where she takes an active role in fundraising, especially for projects benefiting local youth. She is a past board member of the Salinas Valley Memorial Hospital (SVMH) Foundation, as well as the CFMC, where, as an active member of the grants committee, she enjoyed visiting and learning about local nonprofits.

Her favorite causes include organizations benefiting seniors, youth, healthcare (the Nancy Ausonio Mammography Center at SVMH is named in her honor), the CFMC’s Women’s Fund and her local church.

She has received many honors including the KSBW Jefferson Award, the “Luchessi in the World” award (from her parents’

hometown of Lucca, Italy) and the Junior Achievement Monterey Bay Business Hall of Fame. She was named Champion of the Arts by the Arts Council for Monterey County and Outstanding Woman of Monterey County.

She and her late husband, Andy, gave back for many years. The library in Castroville is named in his honor, thanks to Nancy’s leadership efforts. She has passed her values down to her family. Her three children are involved in serving the community and supporting nonprofits in their own right.

#### The Power of Endowment

Nancy created her donor advised fund at the CFMC in 2003. Since then, she has granted more than half of her initial contribution. And, thanks to the power of endowment, the balance of the fund is greater now than when she started. It will have the power to continue to help the community forever.

#### Leaving a Legacy

Nancy understands the impact of planned giving. She intends to add to her fund through an estate gift which will carry on her philanthropic legacy. “It’s all in place. It will continue after I’m gone. Just knowing you’re helping someone that doesn’t have anything or very little feels good,” says Nancy. On working with the CFMC she adds, “You put (your) money in – It’s easy. I like the list of (grantmaking) opportunities.” When asked what she would tell others that were considering giving back to the community she says, **“Do something!”**



**“IF YOU’RE BLESSED TO  
HAVE MADE IT,  
IT’S NICE TO BE ABLE TO  
GIVE SOMETHING BACK.”**

- Nancy Ausonio



# Partnering with Donors

## CREATING A LEGACY

Part of the mission of the CFMC is to inspire philanthropy. By connecting our donors with their passions, the foundation helps to fulfill their philanthropic vision. For many, that comes with the decision to leave a planned gift to the foundation to carry on their charitable legacy.

### Legacy Society

The Legacy Society honors and celebrates those who have chosen to include the foundation in their will or estate plan, or created an endowed fund. Members are invited to an annual appreciation luncheon to hear about the impact legacy giving creates. If you would like to become a member of the Legacy Society and have already included the CFMC in your estate plan, or would like to make a gift through your will, trust, life insurance, charitable gift annuity or other means, please contact Christine Dawson or Dan Baldwin at 831.375.9712 so we may recognize your generosity.

To learn more, visit [www.cfmco.org/legacy](http://www.cfmco.org/legacy)

Anonymous (4)  
 Mrs. Wilbur K. Amonette \*  
 Rick and Tonya Antle  
 Yvonne A. Ascher and Leonard Laub  
 Tony P. Ayres  
 Daniel R. Baldwin and Anne Ylvisaker  
 Robert P. Balles  
 Arlene T. Barr  
 John B. Bergin  
 Paul P. Bianchi  
 Nancy Bletzer  
 Joyce Blevins and Katherine M. Coopman  
 James W. Bogart  
 Thomas Bohnen  
 Jay and Ann Brown  
 Julie A. Cason and Lisa K. Crawley  
 Joseph and Betty Chaffers  
 Arthur Connell \*  
 Julie Conrad  
 Henry Azama and Mishka Chudilowsky  
 Leland\* and Gloria Dake  
 Margaret D'Arrigo-Martin  
 Larry Davidson and Beverly Dekker-Davidson  
 Wallace F. and Lucille Davis  
 Christine Dawson  
 Steve and Sona Dennis  
 Martin Dodd  
 William and Nancy Doolittle  
 Julie Drezner  
 Stephen Eimer and Kevin Ann Cartwright  
 Frances H. Elgan \*

Roberta Elliott  
 Norma Esselstyn  
 Lowell I. Figen  
 Cyrus and Jean Fitton  
 Crawford E. and Linda P. Foy  
 Susie and Charly Franklin  
 Joel and Dena Gambord  
 James and Jeri Gattis  
 Donald and Frances Gaver  
 Rodney Guilfoil \*  
 Terry Haber  
 Ruth Hartmann  
 Peter C. Hatton  
 Virginia O. Hawes  
 Dick Hawkinson  
 Thomas Hawley  
 Carol and Don Hilburn  
 Richard Hobley and Deborah Steel  
 Jeffrey and Amanda Holder  
 Jeanne S. Holmquist  
 Robert and Millie House  
 Chris and Tola Hubbard  
 Jack Jewett  
 Craig and Christine Johnson  
 Joanne Taylor Johnson  
 Mark and Susan Johnson  
 Karen D. Kadushin  
 Mary Ann Kane  
 Rick and Martha Kennifer  
 Alice V. Kinsler  
 Paul Lawrence and Marian Buccafurni  
 Douglas C. Lee  
 Laurel Lee-Alexander  
 Jennifer L. Levey

David S. and Norma Lewis  
 Esther H. Lindsey  
 Robert H. Lindsey  
 Todd Lueders  
 Valera W. Lyles  
 Thomas and Kathy Macdonald  
 John and Ann Mahoney  
 Jan and Tannie Mandel  
 Roger and Carolann Manley  
 Michael and Tobi Marcus  
 Joseph A. and Sheila Mark  
 Jan L. McAlister  
 Sherrie McCullough  
 Thomas D. Melville  
 Lenore Meyer \*  
 Malcolm \* and Joanne Millard  
 Sidney Morris  
 Tony and Lary Muller  
 Alec and Kim Murdock  
 David M. Nee  
 Vicki Nelson  
 Diane R. Nonella  
 F. Robert Nunes  
 Alfred P. Oliverio  
 Charles Olvis and Miranda Morris  
 Mike and Mary Orradre  
 Nicholas M. and Nicollette Pasculli  
 John Phillips and June Dunbar Phillips  
 Gregory A. and Winoma Plaskett  
 Margaret L. Radunich  
 Rex and Joan Reade  
 Reid-Robnett Family Trust  
 Paul Rochester  
 Lee and Shirley Rosen

James C. Sanders  
 John C. Sanders  
 Kenneth C. Schley  
 Carol A. Shade  
 JeriAnn Shapiro  
 Connie Shelstad  
 Robert B. Sheppard  
 Janet L. Shing  
 Sidney Sue Slade  
 Pamela D. Smith  
 Charles and Leslie Snorf  
 George Somero and Amy Anderson  
 David and Maryanne Spradling  
 Jean Stallings  
 Loren Steck and Annette Yee Steck  
 Judy Sulsona and Bill Rawson  
 Tom Sweeney  
 Robert and Leslie Taylor  
 Frederick W. Terman and Nan Borreson  
 Brian Thayer  
 Peter and Anne Thorp  
 Vincent and Evelyn Torras  
 Patricia Tynan-Chapman  
 William H. and Susanne S. Tyler, III  
 William Umeki  
 James R. Valentine  
 Robin Venuti and Joseph Rock  
 Jacqueline Wendland  
 Nels P. Wiegand  
 Kenneth and Mary Wright  
 Richard Zahm

*\*In memoriam*



Christine Dawson presents Legacy Society pin to Sarah Bouchier



Members enjoy Legacy Society luncheon



THE CFMC HELPS  
BRING YOUR  
PHILANTHROPIC  
VISION TO LIFE



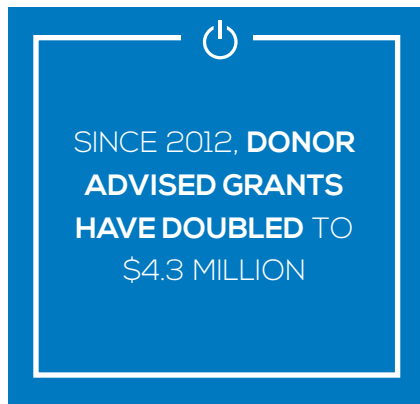
(l to r) Legacy Society Members Jim and Jeri Gattis, Joanne Taylor Johnson



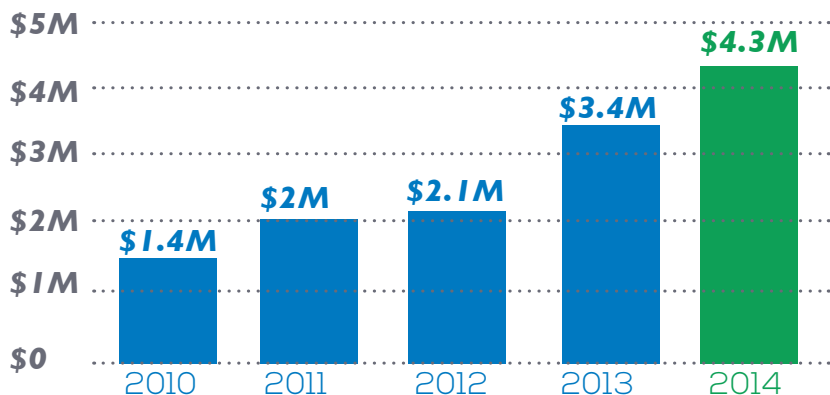


## CO-INVESTMENT WITH DONOR ADVISORS

The CFMC encourages collaboration and adds value to our fund holders' philanthropy through deep community knowledge of local nonprofit organizations. Twice each year, donor advisors receive a list of dozens of grantmaking opportunities to support programs in a wide variety of interest areas. Due to the conversion of some donor advised funds to non-endowed funds and additions to those funds, more than \$470,000 was directed to support Community Impact, Women's Fund, Monterey County Gives! match and Neighborhood Grants in 2014. Donor advised grants have tripled from 2010 and doubled from two years ago, to \$4.3 million, comprising nearly 40% of the foundation's total grantmaking. That is a true partnership, enabling the CFMC to deepen and broaden its grant funding.



## DONOR ADVISED GRANTS



"Growing up on the Monterey Peninsula I personally benefited from so many organizations, that I want to give back in some small way. There are a multitude of deserving organizations throughout Monterey County. As a non-resident, I value the Community Foundation's list of nonprofit opportunities for giving. This list provides descriptions of various community needs and projects and really helps me focus on where my donations can be most effective. We all want Monterey County to continue to be a wonderful place for all of its residents!"

**- Cynthia Snorf Livermore**

## MONTEREY COUNTY GIVES! RAISES RECORD \$1.3 MILLION

Through the Monterey County Gives! Campaign in partnership with the Monterey County Weekly, more than \$1.3 million was given back to the community. This record amount continues the campaign's impressive growth each year. The annual giving opportunity engages youth and encourages donors of all levels to instill the habit

of giving to nonprofits to improve the lives of our neighbors.

*The Monterey County Weekly Community Fund is a donor advised fund of the CFMC. Partners: Monterey County Weekly, CFMC, Neumeier Pomo Investment Counsel, the David and Lucile Packard Foundation, Cannery Row Company, the Ona and Robert Murphy Charitable Trust (managed by Kilzer Wealth Management). Sponsors: Whole Foods, the Doolittle Fund and the Jose F. Fernandez Fund of the Community Foundation for Monterey County.*







# Partnering with Nonprofits

## FUTER ESSENTIAL HUMAN SERVICES GRANTS REALIZING A DONOR'S VISION

The story of the Futer grantees expands the concept of partnership with donors and nonprofits. Rudy Futer entrusted the CFMC with his charitable vision, creating the Rudy E. Futer Fund for Human and Humane Needs through his estate. He directed that the fund be used to make grants for direct human services, particularly at-risk and underserved populations. The CFMC supported organizations through its Community Impact grants program to fulfill his wishes, then took it a step further. In 2012 the CFMC committed \$1.5 million in grants and training to ten anchor social service organizations over three years. The grantees partnered with the CFMC and each other, sharing common challenges and learning ways to address them.

Each agency received \$50,000 annually in general operating funds, along with training, peer gatherings and individualized organizational plans to strengthen their operations. As a result of this wrap-around support, these key organizations developed innovative fund development strategies, new program approaches, stronger boards of directors and improved procedures.

The Futer grantees are: **Coastal Kids Home Care, Community Human Services, Food Bank for Monterey County, Franciscan Workers of Junipero Serra, Housing Resource Center, Legal Services for Seniors, Shelter Outreach Plus, Sun Street Centers, United Farm Workers Foundation and YWCA Monterey County.**

### Success stories:

- YWCA and Legal Services for Seniors developed electronic client information systems, allowing secure storage of sensitive information and increased ability to provide customized services and referrals.
- The UFW Foundation, Community Human Services, Food Bank for Monterey County and the Housing Resource Center expanded their services significantly, doubling or even tripling the number of people served in certain programs.
- Coastal Kids Home Care reached out to families that had benefited from their services, local businesses and the larger community for support. With strong board involvement, they launched Touch-A-Truck day, broadening their reach and providing educational fun to over 500 people.

Thanks to Mr. Futer's generosity and the flexibility of his instructions, the CFMC was able to craft this program to build strong, sustainable nonprofit organizations for our county's safety net. These organizations reported that the three-year support based on proven methodology was critical to developing new, more efficient approaches and a culture of continuous improvement.

REALIZING



Sun Street Centers



Futer grantees strengthen one another

A



Shelter Outreach Plus



Coastal Kids Home Care

VISION



## INVESTING IN **HEALTHY, SAFE AND VIBRANT COMMUNITIES**

**The power of partnership between our donors, fund holders and nonprofit organizations continues to positively impact our community.** Philanthropy

fuels grantmaking, grantmaking creates impact, and impact inspires philanthropy. In 2014, the CFMC, together with its donor advisors, distributed more than \$11 million in 935 grants to 415 agencies in Monterey County and beyond. Grants have been steadily increasing, growing 75% since 2010.

The CFMC Board of Directors approved nearly \$3.6 million through the foundation's competitive grants programs and leadership initiatives to strategically invest in community improvements. The deployment of these philanthropic resources contributes to

the health and welfare of Monterey County's youth and most vulnerable and supports key organizations in the areas of community development, culture and the environment.



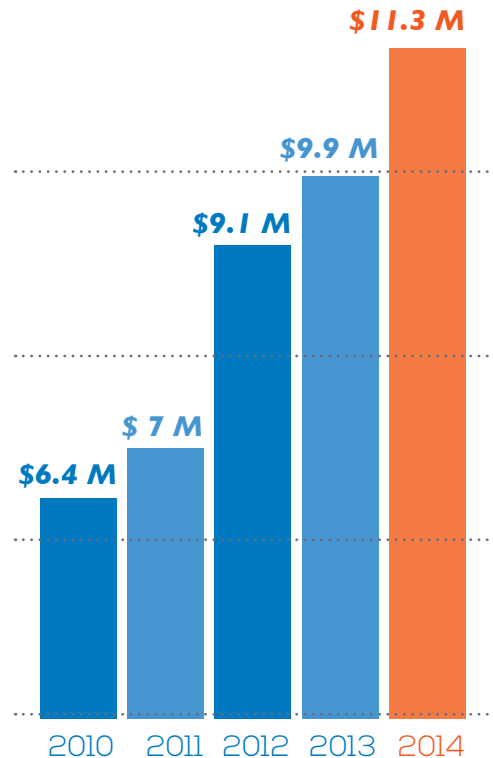
### Partnering with Funders

The CFMC seeks to align its resources for greatest impact, and invites local funding partners to invest in programs such as Girls' Health in Girls' Hands and the LEAD Institute (*see page 15*). Additional grants from the Peggy and Jack

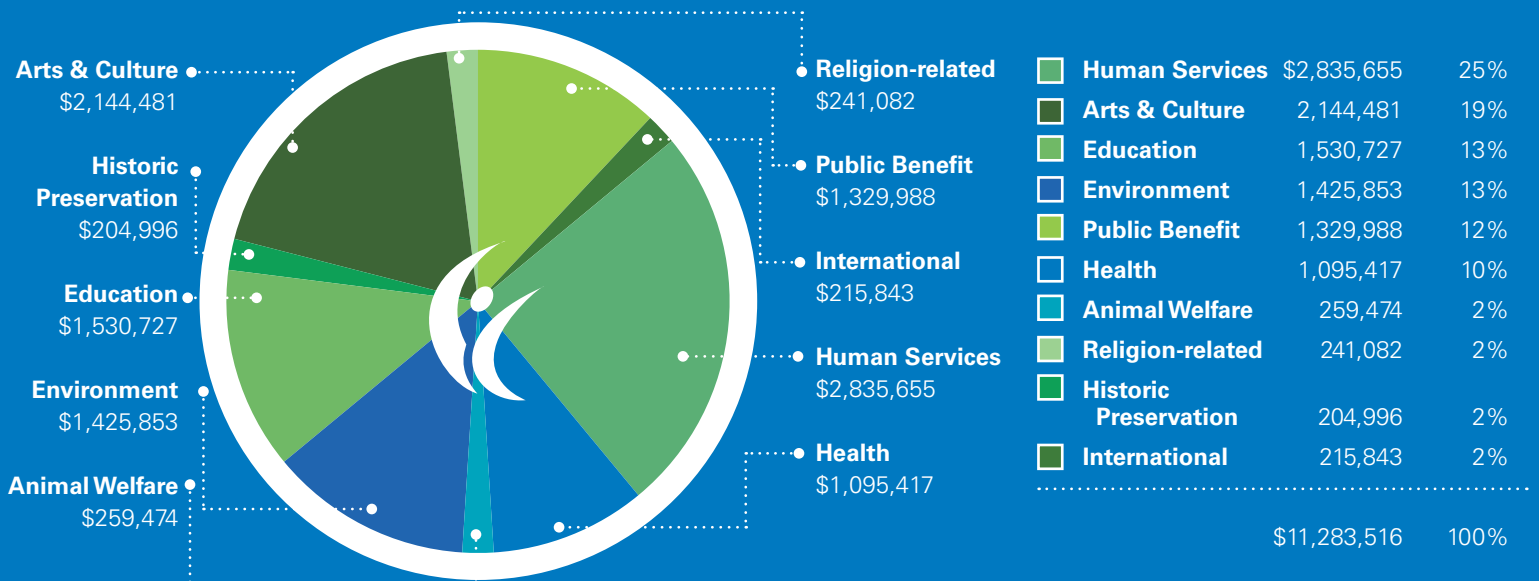
Baskin Foundation, Claire Gianinni Fund, Monterey Peninsula Foundation, and David and Lucile Packard Foundation, to name a few, supported CFMC programs and initiatives.

**The power of partnership = increased investment in healthy, safe and vibrant communities.**

## Record \$11.3 Million Granted



## GRANTS BY PROGRAM AREA





## Partnering with Nonprofits

### MAKING A MEANINGFUL DIFFERENCE

As one of the largest private sources of funding for area nonprofit organizations and programs, the CFMC seeks to align our philanthropic investments with the county's greatest needs, while at the same time fostering collaboration between other funders and community organizations. CFMC grant committees, made up of board and community representatives from across the county, review proposals and select projects with the greatest promise of making a meaningful difference in the lives and wellbeing of Monterey County's diverse residents.



#### COMMUNITY INFORMATION CENTER (ACTION COUNCIL)

**\$18,000** for computer literacy classes for adults in Greenfield and Salinas

The ACTION Council of Monterey was awarded \$18,000 to support the Community Information Center's computer literacy classes in Salinas and Greenfield. The Community Information Center's mission is to educate the Spanish-speaking community in the Salinas Valley about the educational system and help bridge the "digital divide" by providing training in computer literacy in their native language. Internet access remains a challenge for many low-income communities due to cost, cultural barriers and accessibility. The 32-hour course helps users learn how to communicate with their children's schools using email/internet and conduct job searches. The Community Information Center partnered with the Monterey County Office of Education, CSU Monterey Bay, the Boys & Girls Club, and other organizations to serve over 600 participants.

*The ACTION Council provides expertise in program incubation, community building, research & evaluation and serves as a fiscal sponsor for emerging organizations such as the Community Information Center.*



#### CARL CHERRY CENTER FOR THE ARTS **\$10,000** for countywide poetry workshops

The Carl Cherry Center for the Arts was founded in 1948 by a local artist to present arts and theater that explores contemporary issues. The Center currently operates a gallery, sculpture garden and theater space in Carmel for a wide variety of arts programs and events. This grant supported the high school poetry awards and workshops, Thinking Out Loud. These awards provide the motivation to engage with high school students and promote literacy, creativity, community and an appreciation for their own voices. The Center offers workshops on poetry writing and promotes the award program to local high schools. The program reaches high schools countywide and accepts poems from hundreds of students in English and Spanish, understanding that students' voices come in many languages. Each year the Center publishes an anthology of the award winning poems and supporters gather to celebrate the accomplishments of the students.

## Strengthening Communities

### NEIGHBORHOOD GRANTS PROGRAM

The Neighborhood Grants Program (NGP) links funders and donors who have provided resources for charitable purposes with community volunteers they will never meet. These small grants, ranging from \$1,500 to \$4,000, have a tremendous impact when partnered with the energy of caring volunteers who are committed to improving

conditions in their neighborhoods. These grants fuel community groups leading neighborhood beautification projects, after school arts and sports activities, advocacy and support networks and more. In 2014 NGP supported these volunteer-led efforts by granting \$57,100 to 18 groups, bringing the total to more than \$850,000 since 1997.





## **READ TO ME PROJECT (ACTION COUNCIL) \$22,500**

*to expand childhood literacy in the Salinas Valley*

The Read to Me Project is a family reading program where elementary school students receive books and read daily to their younger siblings. Research demonstrates the critical importance of early enrichment through exposure to language, vocabulary, concepts and experiences. Reading to children provides this essential engagement with learning. This program, which began in 2011 with 48 students in East Salinas, now has more than 900 students reading to 1,200 siblings across four school districts in Salinas, Greenfield and Gonzales. The elementary school students receive training on how to effectively read and engage with their younger siblings, and each classroom keeps track of how often the students read. The program focuses on creating a close connection to younger siblings while encouraging literacy through age appropriate books and good storytelling techniques. The Read to Me Project recently received its nonprofit status and plans to continue to expand to over 1,000 readers in 2015.



## **SALUD PARA LA GENTE**

**\$25,000** *for children's dental disease prevention and treatment program in North and South Monterey County*

Salud Para La Gente delivers comprehensive and affordable healthcare in response to the needs of the low-income and migrant communities. Services are provided at its 12 clinic sites on the Central Coast, including Pajaro and Greenfield, and a mobile dental unit regularly provides services at Greenfield Elementary and Alisal Family Resource Center. Tooth decay is the most chronic childhood disease, and it is preventable. Dental disease goes beyond teeth, affecting children's loss in concentration, school absenteeism and overall growth and development. Funding supports 1,000 free dental screenings for low-income, un/under-insured youth, 135 of whom will receive comprehensive treatment (two visits and a six-month follow-up). Children and parents learn about everyday oral hygiene practices and follow-up visits help reinforce these healthy habits.



## **SAVE OUR SHORES**

**\$20,000** *for plastic pollution education and reduction through presentations and beach clean-ups*

Save Our Shores advocates for sound marine policy, educates community members on marine issues, and creates a sense of responsibility for the Monterey Bay National Marine Sanctuary. The organization coordinates beach clean-up efforts, working with more than 10,000 volunteers annually and collecting over 41,000 pounds of trash. Plastic bags are one of the five most common beach litter items and pose a threat to sea turtles and other marine animals. This grant supports beach clean-up efforts and the organization's lead role with the Central Coast Sanctuary Alliance, which formed in 2010 to ban single-use plastic bags. The Alliance has over 90 members representing nonprofit organizations and businesses, and increases awareness through public presentations. To date, the following jurisdictions have plastic bag ordinances: Carmel, Monterey, Gonzales, Pacific Grove, Seaside, Marina, Soledad, Greenfield, King City, Salinas and unincorporated areas of Monterey County.

## **TRANSITION AROMAS**

**\$2,500** *for environmental and sustainability awareness*

Aromas, located in northwestern Monterey County, has half of its 3,000 residents split almost evenly between Monterey and San Benito counties. Residents concerned about the environment formed a group to increase awareness around climate disruption and resource depletion. They were awarded

a neighborhood grant to support the annual Harvest Fair and workshops on disaster preparedness, greywater systems and re-skilling. Workshops focus on rainwater catchment, beekeeping, irrigation and water conservation, repurposing clothing, gopher trapping, fruit tree care, and apple and persimmon preservation. Through these life skill trainings, members learn how to mitigate their impacts on the environment and reduce their carbon footprint.







# Partnering with Nonprofits



Lucy Bernholz shares trends in the field



2014 LEAD Institute graduates



## MONTEREY COUNTY NONPROFITS KNOW HOW TO MAKE A DIFFERENCE



Nonprofits gather for presentation



LEAD alumni come together for a day of reflection



Nonprofit professionals strengthen their skills through CNE offerings



Eric Leland presenting Technology for Nonprofits



## HELPING NONPROFITS THRIVE

The power of partnership with nonprofits goes beyond grantmaking. While nonprofits in Monterey County know how to make a difference, these dedicated organizations typically face challenges that far outstrip available resources. Through workshops and other offerings, the Center for Nonprofit Excellence (CNE) helps nonprofits build on strengths and learn from peers, so that more time and energy can be spent addressing critical needs.

The CNE connects the local nonprofit community with resources for leadership, fund development, management and much more. To do so, CNE staff listen closely to nonprofits and stay abreast of new trends and strategies in the field. The CNE then shares practical tools and encourages promising approaches to strengthen local nonprofit organizations.

### ✔ Strengthening organizations in the Salinas Valley/South County region

The CFMC conducted a survey of more than 300 organizations active in the region to seek feedback on pressing needs. Training topics were suggested by respondents and vetted by a local advisory group. The CNE offered two workshops in Greenfield, "Raising Funds in Your Local Community," with grassroots fundraising expert Kim Klein, and "Getting the Word Out About Your Programs." These workshops focused on the needs of smaller nonprofits and unincorporated organizations, and drew participants from the entire region. The CNE also supported organizations such as Sol Treasures and the YWCA to improve and expand programming. Additional South County workshops will be offered.

### ✔ Supporting Board and Executive Leadership

In 2014, 11 CEOs and 13 board chairs participated in the CNE's peer learning groups to discuss common issues in a confidential setting. The CNE offered three workshops highlighting the Board Transformation Toolkits, where experienced board members spoke as panelists to bolster skills. The CNE also co-sponsored the BoardConnect reception, linking potential board members to local nonprofits and provided organizational development grants to nonprofits working on executive transitions.

### ✔ Celebrating Five Years of the LEAD Institute

The LEAD Institute serves Santa Cruz, Monterey and San Benito Counties, building talented, committed nonprofit leaders for the entire Monterey Bay region. The program prepares mid- to upper-level nonprofit managers for greater leadership roles. LEAD's long-term vision is to support professional development and transitions as organizations expand and long-time leaders move on. LEAD seeks to provide a collection of valuable tools and resources and build a network of peers for ongoing support. In 2014, LEAD graduated a fifth class, bringing the total to 85 participants.

### ✔ Looking Into the Future of Nonprofits

To develop synergy and avoid duplication of efforts, the CNE convened other organizations who provide professional development to local nonprofits. This Capacity Builders Network coordinated training topics and dates, taking a big picture view of how to strengthen the sector. At their suggestion, the CNE brought

Lucy Bernholz to speak about future trends in the field. A Senior Fellow at Stanford University's Center for Philanthropy and Civil Society and visiting scholar at the David and Lucile Packard Foundation, Bernholz addressed a full house on the use of new technology, privacy and other issues likely to affect agencies over the next 10 years.

IF YOU WANT TO  
GO FAST, GO ALONE.  
IF YOU WANT TO  
GO FAR,  
GO TOGETHER."

—African Proverb

To learn more, visit [www.cfmco.org/cne](http://www.cfmco.org/cne)





## Giving & Stewardship



Monterey County Youth Museum



Mission San Antonio de Padua



Monterey County Free Libraries



Operation Freedom Paws

THE POWER  
OF YOUR  
PHILANTHROPY  
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BIT OF GOOD WHERE  
YOU ARE; IT'S THOSE  
LITTLE BITS OF GOOD  
PUT TOGETHER  
THAT OVERWHELM  
THE WORLD."

—Desmond Tutu



Julie Packard addresses guests at annual Legacy Society Luncheon

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"I knew as Mark was dying and we were discussing where his memorial gifts should go, that a donor advised fund named in Mark's memory would be the perfect answer. It provided an initial place where people could direct memorial gifts, as well as an ongoing philanthropic vehicle to continue to support local causes that meant so much to Mark and me. It has already been a very gratifying experience to make grants from the fund. As an individual without family heirs, it is reassuring to know that, even after my life, CFMC will be "Here for Good" providing both competent investment management and careful grantmaking so our assets can continue to support causes in the community we loved so much."

**- Jackie Wendland**



*(l to r) Sharen Carey, Executive Director of the Big Sur Health Center and Patricia Lee Pavey present check to Dan Baldwin to establish the Big Sur Health Center Stewardship Fund*

**THE CFMC HOLDS  
FUNDS CREATED BY  
INDIVIDUALS,  
FAMILIES,  
NONPROFITS AND  
BUSINESSES**



*Reverend Michael Reid of the Fund for Homeless Women with CFMC board member Patti Hiramoto*

**THE CFMC  
IS HERE  
FOR GOOD**



*Trinidad and Patricia Gomez. The Trinidad Gomez Family Fund was established by their mother, Lupe, in honor of their late father.*



*MPUSD Fund for the Arts enriches arts programming*



## WAYS TO GIVE

The CFMC holds more than 350 funds created by individuals, families nonprofits and businesses. Funds can be established to benefit individual organizations, specific types of nonprofits (such as arts, youth, the environment), or unrestricted to respond to changing community needs. The CFMC is a trusted steward of both philanthropic assets and donor intent. Please contact us at 831.375.9712 or [www.cfmco.org/waystogive](http://www.cfmco.org/waystogive) to learn more.

### Affiliate Funds

*A local advisory board provides oversight, defines grantmaking priorities, and raises funds that are distributed to community organizations serving a specific region*

#### **Southern Monterey County Foundation\***

#### **Southern Monterey County Foundation – Non-endowed\***

### Agency Endowment Funds

*Agencies benefit from participation in the CFMC's investment pool, help with planned giving, and a reliable source of income*

39 Craftsmen Fund for Monterey County Youth Museum  
Alliance on Aging Endowment Fund  
Alzheimer's Association of Monterey County Fund  
Big Sur Health Center Endowment Fund  
The Big Sur Land Trust Conservation Fund  
Blind and Visually Impaired Center Fund  
Laurie Boone Hogen Appreciation Fund for Excellence in Teaching  
The Boys and Girls Club of the Monterey Peninsula Fund  
Carl Cherry Center for the Arts Fund  
Carmel Music Society Endowment Fund  
Carmel Woman's Club Fund  
Casa Amesti Foundation

Building Endowment Fund  
David Allen Bernahl II, Local Heroes Fund for CASA

#### **Center for Photographic Art Fund\***

Chamber Music Monterey Bay Fund  
Chartwell School Scholarship Endowment Fund  
Children's Services International Fund  
Community Partnership for Youth Fund  
Carmel Public Library Foundation Fund  
Carmel Public Library Foundation - Children's Fund  
Elkhorn Slough Foundation, Inc. Fund  
Fred Farr & Edwin Bliss Buckeye Memorial Fund  
Fenton Founders' Fund for Youth Music Monterey  
Director Emeritus Richard Tyler Scholarship Award  
Food Bank for Monterey County Endowment Fund  
Friends of the Carmel Valley Library Fund  
Friends of the Salvation Army Monterey Peninsula Fund  
Girl Scouts of California's Central Coast Endowment Fund  
Goodwill Industries of Santa Cruz, Monterey and San Luis Obispo Counties Fund

Health Projects Center Fund  
Interim, Inc. Mental Illness Endowment Fund  
Kinship Center Fund  
Bishop Kip Fund for All Saints School  
Legal Services for Seniors Endowment Fund  
LULAC Council # 2055 Fund  
Lyceum Founders' Fund in Memory of Vera Hering and Claire Kennedy  
Foundation for Monterey County Free Libraries - General Endowment Fund  
Foundation for Monterey County Free Libraries - Dallas Shaffer Book Fund  
Monterey County Free Libraries Staff Development Fund  
Meals on Wheels of the Monterey Peninsula Fund  
Eve Mills Memorial Fund for Meals on Wheels Salinas Valley  
Meals on Wheels of Salinas, Inc. Fund  
Monterey History and Art Association Endowment Fund  
Monterey Public Library Fund  
MPC Women Supporting Women Endowment Fund  
Monterey Museum of Art Fund

Monterey County Historical Society Fund  
Museum Foundation of Pacific Grove Fund  
Natividad Medical Foundation Fund  
Danny Nugent Memorial Campership Fund  
Ombudsman for Long-Term Care Fund  
Operating Endowment Fund  
Nellie Irons Orr Scholarship Fund  
Pacific Repertory Theatre Endowment  
Salinas Rodeo Rotary Club Foundation Agency Endowment Fund  
Shelter Outreach Plus Fund  
SPCA of Monterey County Fund  
St. Timothy Foundation, Inc. Fund  
Sunset Theater Endowment Fund  
Sylvia W. Schwarz Endowment for Reading Improvement at Tularcitos School  
Robinson Jeffers Tor House Fund  
Tularcitos Parent Teacher Organization Fund  
United Way of Monterey County Fund  
Ventana Trails Forever Fund  
Ventana Wildlife Society Fund  
The Western Stage Endowment Fund  
**Youth in Wilderness Fund\***  
York School Fund

### Corporate Funds

*Businesses receive tax advantages, and customized support to maximize their community philanthropy*

#### **Carmel Realty Foundation\***

#### **Community Healthcare Corporation Fund\***

Monterey County Weekly Community Fund  
Nepenthe/Phoenix Corporation Fund

### Designated Funds

*Donors can support a specific agency or agencies with a permanent, protected stream of operating income*

Arts Council for Monterey County Endowment Fund  
Tony P. and Marjorie Ayres Fund  
Nancy Parker Benham Endowment Fund  
Central Coast Lighthouse Keepers Fund  
Cislini Fund  
Howard and Lynn Classen Endowment  
The Gloria S. Daly Endowment Fund for All Saints' Episcopal Day School

Frances Elgan & Werner Kunkel Fund  
The Herman Fletcher Fund  
A Fork in the Road - A Fund Providing a Path to a Science Career  
John Gill ALS Patient Support Fund  
Hester Hyde Griffin Fund for All Saints Day School  
Rodney & Betty Guilfoil Fund  
The Hudson Fund  
Ward D. and Mary T. Ingram Fund  
Bob Jones Boy Scout Camping Fund  
The William Kiepora Fund  
Sandy Loiacono Scholarship Fund  
John H. Marble Endowment Fund  
Jane P. McKay Endowment Fund for the Big Sur Land Trust Fellowship Program  
Jane P. McKay Endowment Fund for Door to Hope  
Jane P. McKay Endowment Fund for the Hartnell College Foundation Counselors' Grants Program  
Joyce Morris Fund  
Monterey County Symphony Association Fund  
Margaret L. Musser Restricted Fund  
Perry-Downer House Fund  
Merritt V. Weber Fund  
Maud Porter Work Rose Garden Fund  
YWCA Endowment Fund

### Donor Advised Funds

*Advisors recommend grants from their fund to support nonprofit organizations and work with CFMC staff to create a meaningful philanthropic legacy*

Anonymous Donor Advised Fund  
Zekai and Carolyn Akcan Fund  
William S. and Janice R. Anderson Fund  
Amy Anderson and George Somero Fund  
Andrew and Victoria Ausonio Family Fund  
Ausonio Family Fund  
Peggy Downes Baskin Fund for Women's Reentry  
Lino and Teri Belli Family Fund  
The Benjamin Family Foundation  
Marta L. Bennett Fund  
The Brown Family Fund  
Buccafurni-Lawrence Fund  
The Buffett Fund  
Chappellet Youth, Arts, and Ecology Fund  
Chris's Fund  
**Scott Corwon Fund\***  
Cynthia Snorf Fund

Andrew & Phyllis D'Arrigo Fund  
D'Arrigo-Martin Fund  
Marcia F. DeVoe Fund  
DeWitt Fund  
Helen R. Doe Fund  
Doolittle Fund  
**Jean and Jim Duff Fund\***  
Eimer/Cartwright Fund  
Howard and Karin Evans Fund  
Davis Factor, Jr. Fund  
Farrell/Allen Carmel Rotary Fund  
Doris Parker Fee Fund  
Ted Fehring Family/Carmel Host Lions Club Fund  
Lewis and Gloria Fenton Fund  
Jose F. Fernandez Fund  
Lori and Lou Flagg Memorial Youth Fund  
Tom and Mary Kay Gallagher Fund  
**Gloria Fund\***  
Jessica Govea-Thorbourne Memorial Fund  
Harlan and Barbara Hall Fund  
Dr. Adriana Hayward Fund  
The Peter and Jackie Henning Fund  
Hicks Fund for the Arts  
Elmer G. and William G. Hitchcock Fund  
Mary and Peter Hobley Memorial Fund  
**Hodges Family Fund\***  
Jeanne Smith-Holmquist Fund  
Kadushin Robinson Fund  
Jack and Patricia Kilmartin Fund  
The Kohn Family Theatre and Arts Fund  
Phyllis Geer Krystal Fund  
The Landreth Family Fund  
James and Susan Lansbury Fund  
Jefferson and Frances Larkey Memorial Fund  
Phyllis and Herbert Lister Fund  
Valera Whitford Lyles Fund  
Mahoney/Peterson Family Fund  
Cappy Martin/Vernon Hurd Monterey Rotary Club Fund  
The Ann Mayer Hiller Memorial Fund  
McMahan Family Fund  
Catherine L. and Robert O. McMahan Fund  
Marjorie McNeely Fund for the Blind or Illiterate  
Lenore and Dale Meyer Fund  
Malcolm and Joanne Millard Fund  
Mills Family Fund  
**Howard and Anne Morgens Fund\***  
Monterey Peninsula Sunrise Rotary Club Fund  
Anthony and Lary Lynn Muller Fund  
Gilbert M. Neill Math Fund  
Non-Point Source Projects Fund





# Ways to Give CONTINUED

Don Nucci Fund for the Salinas Valley  
F. Robert Nunes Family Fund  
Oak Hill Charitable Fund  
Mike and Mary Orradre Fund

## **Reese Family Fund\***

The Fred Rowden Memorial Fund

## **RSH Fund\***

Tom and Carol Russell Family Fund  
Salinas Rodeo Rotary Club Fund  
Salinas Rotary Club Fund  
Fund for the Salinas Valley  
The James M. Shade Memorial Fund  
Will and Mary Shaw Fund  
Ramsey Shirk Fund  
Snorf Endowment Fund  
The Snorf Fund  
Salinas Steinbeck Rotary Club Fund  
Robert and Leslie Taylor Fund

## **The Fred Terman and Nan Borreson Fund\***

Peter and Anne Thorp Fund  
Trinidad Gomez Family Fund  
William and Susanne Tyler Fund  
Wiegand Family Foundation  
**Mark R. Wendland Memorial Fund\***  
Willemssen Family Fund

## **Field of Interest Funds**

*Donors specify a charitable field of interest and the CFMC's Board of Directors awards grants to organizations making a difference in our county*

Ruth L. and Wilbur K. Amonette Fund  
Paul Block, Jr. Fund  
Patricia J. Boles Fund  
Maureen Bradford Fund  
Stephen and Madeleine Conran Fund

## **The John & Mary Dawson Learning Fund\***

Thomas Doud, Sr. and Anita M. Doud Fund  
Ken and Gundy DuVall Fund  
Fund for the Environment  
Fred Farr Environmental Stewardship Fund  
Rudy E. Futer Fund for Human & Humane Needs  
Good Neighbor Basic Human Needs Fund  
Gumm Fund for the Performing Arts  
Elmer Mills Harris Fund  
Douglas Madsen Fund for HIV/AIDS Housing in Monterey County  
The Fund for Homeless Women  
The Fund for Homeless Women Non-endowed Fund  
Terry Layne Fund for Beach Protection  
Literacy Campaign Fund

The Todd Lueders Fund for the Arts  
Kathleen and Howard Marks Fund  
The McKay Fund

## **MPUSD Fund for the Arts\***

Engracia Irene Murray Field of Interest Fund  
Margaret L. Musser Field of Interest Fund  
Andrew D. and Marjorie S. Orrick Fund  
Out Reach - A Fund for LGBT Life in Monterey County  
Dr. Frank Pye Smith Medical Facilities Fund  
Katherine Curtis Springer Fibromyalgia and Chronic Fatigue Syndrome Patient Support Fund  
Robert and Virginia Stanton Endowment Fund  
Irving R. and Helen G. Stuart Fund  
The James M. and Marjorie E. Sturgeon Fund  
Evelyn and Spencer Thompson Fund to Help Feed the Hungry  
Dr. George & Sam Kih Thorngate Family Fund  
Tri-Counties Blood Bank Fund  
Anita Tarr Turk Fund for Breast Cancer Research  
Women's Fund Endowment Youth Fund

## **General Endowment Funds**

*Donors place their trust in the CFMC's expert staff and board to respond to the community's most pressing needs now and into the future*

Fund for the 21st Century  
Kathleen and Austin Barrows Fund

## **Wendy (Millard) Benjamin Fund\***

Cislini Fund #2  
CFMC Trustees Fund  
Mary Jane Drummond Fund  
General Endowment Fund of the Community Foundation  
Marilyn & Philo Holland Fund  
Lauralie and J. Irvine Fund  
George P. and Betty Kendall Memorial Fund  
Leo Lanini Fund  
The Barbara and Joseph Lee Fund  
The John and Nancy Love Fund  
John R. Marron Fund  
Neighborhood Grants Program Fund  
Opportunity Fund  
The Donna Roop Endowment Fund  
The Scott Fund

## **Private Foundation Funds**

*These funds offer administrative support, plus increased flexibility, tax advantages and personalized philanthropic services*

Joel and Dena Gambord Charitable Foundation  
The Morse Foundation Stewardship Fund  
David and Lucile Packard Foundation  
Robert N. & Florence Slinger Foundation Fund  
S.T.A.R. Foundation of Monterey County Stewardship Fund  
**The Alexander F. Victor Foundation\***

## **Scholarship & Award Funds**

*Donors invest in the future of local students and support a variety of individuals with the help of professional staff*

Monica Abbott Scholarship Fund  
AIA Monterey Bay Concepts Competition Fund  
Dr. William D. Barr Scholarship Fund for Excellence in Educational Leadership

## **Dr. Roger and Kate Bartels Memorial Scholarship Fund\***

The Bissell Fund  
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund  
Margaret and Seba Bronson Scholarship Fund  
Carol C. W. Butterfield Bacon Scholarship Fund

## **The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship Fund\***

California Polytechnic State University Agriculture Business Department Endowment Fund  
Carmel High School Class of 1952 Fund  
Bill Clapper Memorial Music Scholarship Fund  
The Nancy Wheelis Dodd Fund  
The Elkhorn Slough Foundation's James Rote & Les Strnad Scholarship Fund  
David L. Ferguson Scholarship Fund  
Matthew Paul Finnigan Memorial Scholarship Fund  
Flagg Scholarship Holding Fund  
The Allen S. Griffin Fund

Geraldyn R. Griffith Memorial Scholarship Fund  
Hausdorf Family Scholarship Fund  
Ed Kennedy Journalism Scholarship Fund  
Kier Memorial Scholarship Fund  
The Jim Martin Scholarship Fund  
The Morse Foundation Scholarship Fund  
Robert Hattori Nakamura Memorial Scholarship Fund  
Anthony Nicholas Narigi Memorial Baseball Endowment

## **Dr. Gladys M. Olvis Scholarship Fund\***

Kristopher Pallastrini Fund  
Richard Scott Reynolds Science and Technology Education Scholarship Fund  
San Ardo Foundation for Education  
Theodore R. Sarbin Research and Scholarship Award Fund  
The Harles R. Sarment College Endowment  
Alan and Rita Shugart Scholarship Fund  
**Joseph and Betty Spradling Scholarship Fund\***

Robert Stanton Award Fund  
Wilbur H. and Maxine D. Stevens Scholarship Fund  
Charles Joseph Watts Scholarship Fund  
Shelley Watts Scholarship Fund  
Horace H. Wilson Scholarship Fund

## **Stewardship Funds**

*Agencies benefit from participation in the CFMC's investment pool, help with planned giving, and maintain access to the fund's principal*

**1984 Fund\***  
Big Sur Health Center Stewardship Fund  
Carmel Valley Kiwanis Foundation Stewardship Fund  
Carmel Woman's Club Stewardship Fund  
Central Coast VNA and Hospice, Inc. Stewardship Fund  
Chamber Music Monterey Bay Stewardship Fund  
Community Human Services Stewardship Fund  
**Church in the Forest Stewardship Fund\***  
Del Monte Forest Conservancy Fund  
**Friends of the Marina Library Stewardship Fund\***  
Girls, Inc. Stewardship Fund

Japanese American Citizens League of Monterey Peninsula Stewardship Fund  
Kernes Adaptive Aquatics Stewardship Fund  
LandWatch Monterey County Stewardship Fund  
Methodist Foundation of Pacific Grove Stewardship Fund  
Monterey County Rape Crisis Center Stewardship Fund  
Museum Foundation of Pacific Grove Stewardship Fund  
Pacific Grove Public Library Foundation Stewardship Fund  
Peace of Mind Dog Rescue Stewardship Fund  
Rancho Cielo Youth Stewardship Fund  
Shelter Outreach Plus Stewardship Fund  
Sun Street Centers Stewardship Fund  
Temple Beth El Stewardship Fund  
United Way Monterey County Stewardship Fund  
**Voices for Children Stewardship Fund\***

## **Temporary Funds**

*Funds established for urgent needs, specific projects or initiatives with a limited timeframe*

Alert Monterey County Fund  
Big Sur Fire Fund  
Casa Amesti Garden and House Fund  
Center for Nonprofit Excellence  
Central Coast Veterans Cemetery Foundation  
Community Leadership Project  
Rudolph E. Futer Restricted Purpose Fund  
Girls' Health Initiative Grover Hermann Foundation Fund  
The Monterey Experience Project Fund  
Pathways to Safety

**\* created in 2014**





Photos by Randy Tunnell



## CFMC BOARD OF DIRECTORS

BACK (l to r)

**James Panetta**, Monterey County District Attorney  
**Alfred Diaz-Infante**, President/CEO CHISPA  
**Judge John M. Phillips (retired)**, Monterey County Supervisor, District 2  
**Ken Wright**, Community Volunteer  
**Greg Chilton**, Attorney at Law, Chilton & House, LLP  
**Rick Kennifer**, Attorney at Law, Johnson, Fantl & Kennifer, LLP  
**Ken Petersen**, President, Monterey Private Wealth  
**Stephen McGowan**, former CFO and EVP Corporate Resources, Sun Microsystems, Inc.  
**Raul Rodriguez**, Owner, La Plaza Bakery  
**Stephen Dart**, Principal, Dart Family Co. Inc.

FRONT (l to r)

**Tonya Antle**, Community Volunteer, Principal, Tanimura & Antle  
**Patti Hiramoto**, AVP of Inclusive Excellence, Chief Diversity Officer, CSU Monterey Bay  
**Erica Padilla-Chavez**, CEO, Pajaro Valley Prevention and Student Assistance  
**Tina Starkey Lopez**, Senior Relationship Manager, Pacific Valley Bank  
**Gail Delorey**, CPA, Managing Partner, Bianchi, Kasavan & Pope, LLP  
**Ida Lopez Chan**, Senior Vice President, Wells Fargo Bank  
**Catherine Kobrinsky Evans**, Partner, The Kobrinsky Group

NOT PICTURED

**Ann Brown**, Rancher \*  
**Jim Claypool**, Claypool Consulting \*  
**Kelly McMillin**, Chief, Salinas Police Department \*  
**Anna Marie Ponce**, Sun Valley Berries, LLC

\* We are especially grateful to Ann Brown, Jim Claypool and Kelly McMillin for their service which ended in 2014.

## CFMC STAFF

STANDING (l to r)

**Dan Baldwin**, President/CEO  
**Kaki Rusmore**, Director Center for Nonprofit Excellence  
**Jan McAlister**, Development Associate  
**Brian Thayer**, Philanthropic Services Officer  
**Susie Polnaszek**, Program Officer  
**Josh Warburg**, Philanthropic Services Associate  
**Diane Nonella**, Director of Finance & Human Resources  
**Amanda Holder**, Communications Officer  
**Lynn Bentaleb**, Program Officer  
**Eva Holt Rusmore**, Program Manager, Girls' Health in Girls' Hands  
**Arlene Barr**, Administrative Services Coordinator

SEATED (l to r)

**Aurelio Salazar, Jr.**, Program Officer  
**Julie Conrad**, Administrative Services Manager  
**Laurel Lee-Alexander**, VP Grants and Programs  
**Christine Dawson**, Director of Philanthropic Services  
**Janet Shing**, Senior Program Officer

NOT PICTURED

**Angela Cline**, Accounting Manager  
**Karina Gutierrez**, Grants & Office Administrator  
**Julie Drezner**, VP Grants and Programs (retired)



Richard Green

(l to r) Gail Delorey, Ann Brown and Kelly McMillin at Celebration of Philanthropy



Aurelio Salazar, Jr.

"We must always be moving forward." - President/CEO Dan Baldwin, 2014 Annual Report



## Giving & Stewardship



CFMC Investment Committee; Back (l to r) Ida Lopez Chan, Bill Doolittle, Ken Petersen, Craig Johnson, Jimmy Panetta, Dan Baldwin, Stephen Dart; Front: (l to r) David Benjamin, Anne Westreich (Verus), Rick Kennifer, Tina Starkey Lopez. Not pictured: Steve McGowan, Bill Sharpe

## FINANCIAL STEWARSHIP

The motto of the CFMC is “Here for Good.” The board of directors and staff take that expression seriously as we steward the assets entrusted to us for the good of Monterey County in perpetuity. With a distinguished investment committee and the consultancy of Verus, we invest these resources for the long term, to protect and preserve the endowment, while allowing growth to fuel future grantmaking. The CFMC is confirmed in compliance with rigorous national standards for community foundations.

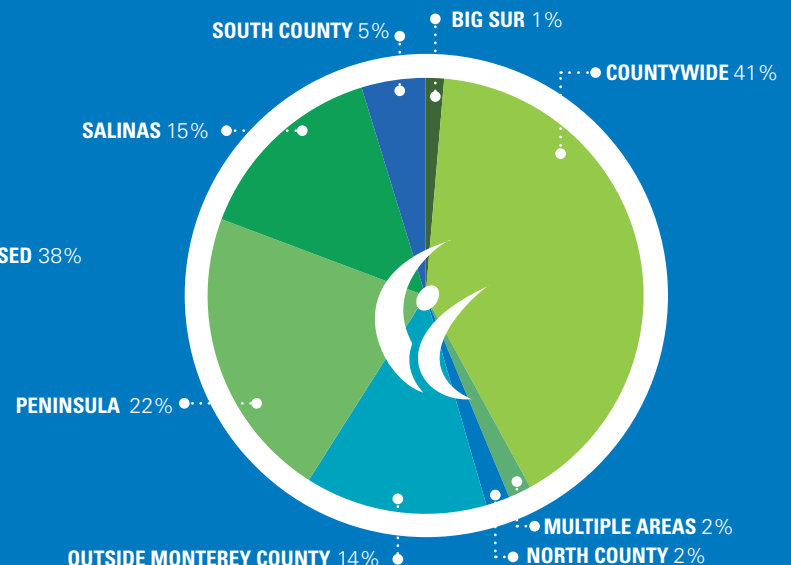
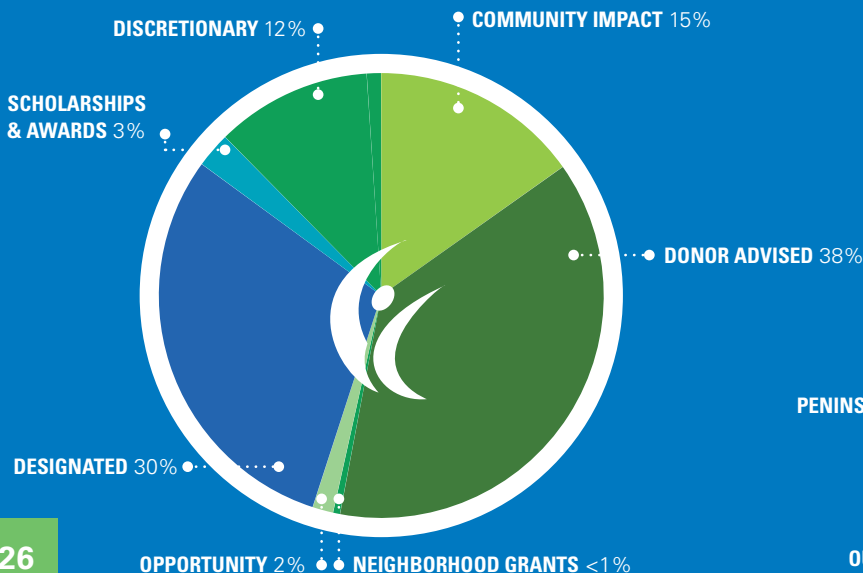
For more information visit  
[www.cfmco.org/finance](http://www.cfmco.org/finance)

## SOURCE OF GRANT FUNDS

Donor Advised	\$4,267,185
Designated	3,395,664
Community Impact	1,705,359
Discretionary (Field of Interest, Women’s Fund, etc.)	1,397,165
Scholarships & Awards	288,865
Opportunity	172,178
Neighborhood Grants	57,100
	<hr/>
	\$11,283,516

## GRANTS BY REGION

Countywide	\$4,583,303
Peninsula	2,453,835
Salinas	1,641,074
South County	535,964
North County	198,931
Multiple Areas	191,990
Big Sur	153,754
Outside Monterey County	1,524,665
	<hr/>
	\$11,283,516





## COMMUNITY FOUNDATION FOR MONTEREY COUNTY

### CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2014

### CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2014

#### ADDITIONS

Contributions*	\$11,016,334
Other income	856,772

**Total assets** **\$11,873,106**

#### INVESTMENT INCOME

Grants and expenses	
Grants*	10,649,202
Other operating expenses	2,834,255

**Total grants and expenses** **\$13,483,457**

**INCREASE IN NET ASSETS** **4,537,931**

#### NET ASSETS

Beginning of year 145,170,364

**End of Year** **\$149,708,295**

*This condensed Financial Statement was prepared by PMB Helin Donovan, LLP based on audited financial statements prepared by them for the year ending December 31, 2014. A copy of the completed audited financial statements or the IRS Form 990 can be obtained at the CFMC office or online at [www.cfmco.org](http://www.cfmco.org).*

\* net of contributions received and grants disbursed on behalf of nonprofit agency and stewardship funds

#### ASSETS

Cash and equivalents	\$ 7,601,459
Contributions receivable	1,994,034
Other assets	29,565
Property and equipment, net	1,780,379
Investments, carried at market value	
Mutual funds and equities	137,239,407
Cash and money market funds	7,733,365
Beneficial interest in remainder trusts administered by other trustees	1,136,529
Investments held in charitable remainder trusts	20,353,477

**Total assets** **\$177,868,215**

#### LIABILITIES AND NET ASSETS

Grants payable	1,043,561
Accounts payable and accrued expenses	114,403
Liabilities under split-interest agreements and charitable remainder trusts	13,180,126
Funds held for others	13,821,830

**Total liabilities** **28,159,920**

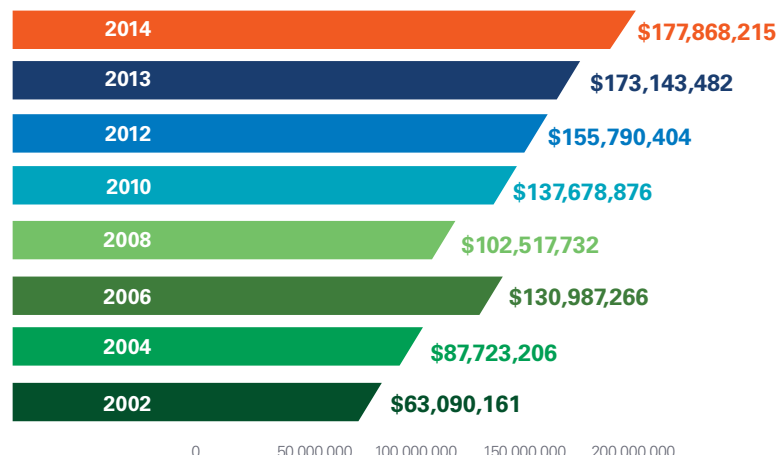
**Total net assets** **\$149,708,295**



Confirmed in Compliance with National Standards for U.S. Community Foundations  
Member, Council on Foundations League of California Community Foundations

## YEAR END TOTAL ASSETS

Year	Amount (\$)
2014	177,868,215
2013	173,143,482
2012	155,790,404
2010	137,678,876
2008	102,517,732
2006	130,987,266
2004	87,723,206
2002	63,090,161







# Giving & Stewardship

## 2014 COMMITTEES

The CFMC relies on the expertise of its volunteer board and committee members. Thank you for your investment of time, talent and partnership in this important work.

### BOARD COMMITTEES

#### Executive Committee

Gail Delorey (Chair), Rick Kennifer (Vice Chair), Greg Chilton, Alfred Diaz-Infante, Catherine Kobrinsky Evans (Secretary), Tina Starkey Lopez (Treasurer), Ken Petersen

#### Audit Committee

Ken Wright (Chair), Jim Claypool, Gail Delorey, Rick Kennifer, Tina Starkey Lopez

#### Grants and Programs Committee

Alfred Diaz-Infante (Chair), Gail Delorey, Catherine Kobrinsky Evans, Patricia Hiramoto, Kelly McMillin, John Phillips, Anna Marie Ponce

#### Investment Committee

Ken Petersen (Chair), David Benjamin, Ida Lopez Chan, Steve Dart, Gail Delorey, Bill Doolittle, Craig Johnson, Steve McGowan, Bill Sharpe, Tina Starkey Lopez

#### Finance Committee

Tina Starkey Lopez (Chair), Jim Claypool, Steve Dart, Gail Delorey, Rick Kennifer, Ken Wright

#### Governance Committee

Ann Brown (Chair), Gail Delorey, Alfred Diaz-Infante, Ken Petersen, Ken Wright

#### Resource Development

Greg Chilton (Chair), Tonya Antle, Gail Delorey, Kurt Gollnick, Steve McGowan, Raul Rodriguez

### ADVISORY COMMITTEES

#### Community Impact Grants Committee

**Community Engagement**  
Catherine Kobrinsky Evans (Chair), Alfred Diaz-Infante, Chris Lopez, Kelly McMillin, Christine Dressler Moss, Reyna Navarette, Maria Orozco, John Perez, Seth Pollack, Ken Wright

#### Health & Human Services, Economic Opportunity & Environment

John Phillips (Chair), Paulette Bumbalough, Greg Chilton, Steve Dennis, Len Foster, Diana Jimenez, Regina Mason, John Silva, Rosemary Soto

#### Youth Development & Culture

Ann Brown and Patricia Hiramoto (Co-chairs), Meg Clovis, Jennifer Colby, Sharon Gish, Anna Marie Ponce, Francine Rodd, Brenda Grayson Shinault, Rose Vasquez, Mark Verbonich

#### Real Estate Advisory Committee

Sarah Bouchier (Chair), Ann Brown, Thomas Bohnen, Catherine Kobrinsky Evans, James Heisinger, Craig Johnson, Bill Mitchell, John Mahoney

#### Robert and Virginia Stanton Endowment Committee

Ramona Smith (Chair), Iathan Annand, Ann Brown, Stephen Dart, Kip Hudson, Breck Tostevin

#### Women's Fund Grants Committee:

Konny Murray (Chair), Barbara Babcock, Vivian Brennand, Ann Brown, Joan Crenshaw, Karen Csejtey, Margaret D'Arrigo-Martin, Emily Hull-Parsons, Felicia Perez-Kausin, Annabelle Rodriguez, Jeannie Tanimura, Traci Townsend, Bonnie Yokota

#### Women's Fund Endowment Committee:

Tonya Antle (Chair), Sarah Bouchier, Kevin Cartwright, Jeri Gattis, Kathryn Harrison, Tobi Marcus, Kay Sullivan

#### Women's Economic Security Working Group:

Tonya Antle, Barbara Babcock, Vivian Brennand, Karen Csejtey, Kate Daniels Kurz, Konny Murray, Felicia Perez-Kausin, Amy Sands, Judy Sulsona, Carol Tisson

#### South Monterey County Capacity Building Advisory Committee

Paulette Bumbalough, Joe Gonzales, David Norum, Raul Rodriguez, Harold Walgamott

#### Southern Monterey County Foundation Advisory Board

Rich Casey (Chair), Grace Borzini, Ann Brown, Paulette Bumbalough, Rob Cullen, Tina Starkey Lopez, Mikel Ann Miller, Mary Orradre

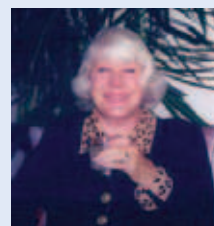
## IN MEMORIAM



**Robert V. Antle,**  
Former CFMC board member,  
Distinguished Trustee Award  
Recipient 2010



**Leo L. Lanini,**  
Fund holder



**Barbara Lee,**  
Fund holder



**John and Nancy Love,**  
Fund holders





**AMONG TOP 100 U.S. COMMUNITY FOUNDATIONS IN ASSET SIZE\***

**GRANTED RECORD \$11.3 MILLION**

**RECEIVED \$13.8 MILLION IN GIFTS**

**CREATED SOUTHERN MONTEREY COUNTY FOUNDATION**

**LEAD INSTITUTE  
5TH ANNIVERSARY-  
85 GRADUATED**

**180 NONPROFITS STRENGTHENED THROUGH  
CENTER FOR NONPROFIT EXCELLENCE**

**MONTEREY COUNTY GIVES! \$1.3 MILLION**



***Our accomplishments are only made possible through your support and partnership.***



**Monterey Office**  
2354 Garden Road  
Monterey, CA 93940  
831.375.9712  
Fax 831.375.4731

**Salinas Office**  
945 S. Main St., Suite 207  
Salinas, CA 93901  
831.754.5880  
Fax 831.754.5876

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[www.cfmco.org](http://www.cfmco.org)

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Read to Me Project

# Healthy, Safe, Vibrant COMMUNITIES