

## PHILANTHROPY BY















ANNUAL REPORT



## Here for Good Community Foundation

for Monterey County



#### VISION

HEALTHY, SAFE, VIBRANT COMMUNITIES





#### **MISSION**

TO INSPIRE PHILANTHROPY
AND BE A CATALYST FOR
STRENGTHENING
COMMUNITIES THROUGHOUT
MONTEREY COUNTY



#### 2016 QUICK FACTS



Grants, Awards and Scholarships Approved for Distribution to 415 Grantees

#### TOP 100

Community
Foundations in the
U.S. (in asset size)\*

\*Columbus Survey 2016



#### MILLION

in Cumulative Grantmaking Since 1981



#### MILLION

Assets Grew 14.8% to a Record \$209 Million



#### MILLION

in Contributions Received





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"HOW WE INVEST, HOW WE GRANT, HOW WE HONOR DONOR INTENT – IS A TOP PRIORITY OF YOUR COMMUNITY FOUNDATION EACH AND EVERY DAY."

– Dan Baldwin,CFMC President/CEO

## MESSAGE TO THE COMMUNITY

#### From the Chair & President/CEO

2016 offered a clear reminder of how remarkable Monterey County is, and, in some respects, how fragile. It also reminded us of the important role of philanthropy and the Community Foundation for Monterey County.

By any measure, we can describe 2016 as one of the best years in the CFMC's 36-year history. Our total assets grew from \$180 million to \$209 million. Grantmaking grew from \$9.8 million to a record \$15.4 million. More than \$34 million in gifts were made to the CFMC, also a record. These numbers represent a tremendous spirit of giving in Monterey County, and a growing belief that the CFMC is a trusted partner for those wanting to make a difference in their community.

But numbers don't tell stories. 2016 will long be remembered as the year of the Soberanes Fire. One illegal campfire caused 132,000 acres in Big Sur to burn, destroyed 57 homes, and became the most expensive wildfire in U.S. history. It displaced families. It had a tremendous effect on Big Sur businesses, putting many of their workers' jobs at risk. We started the Soberanes Fire Fund in the days after its onset, then watched in amazement as gifts began to pour in from across the country, special events were organized, and the generosity driven by neighbors helping neighbors took hold. Nearly \$1 million was raised that provided support to families and the ability to help rebuild infrastructure.

2016 saw a renewed commitment to college-bound students. A general increase in the awareness of the benefits and cost of higher education motivated many new donors to start scholarship funds. This is leveraged by a new partnership we have with the College Futures Foundation, creating a marked increase in our scholarship capacity. Simply put, this means more young people will be headed to college and have the ability to make larger contributions to our community.

Community foundations are reflections of philanthropic spirit. We cite the CFMC's assets, but they exist only because individuals and families made choices to utilize philanthropy as a way of reinvesting in Monterey County. The stewardship of those assets – how we invest, how we grant, how we honor donor intent – is a top priority of your community foundation each and every day.

We hope you enjoy the 2016 annual report. It is filled with wonderful examples of how donor decisions aligned with CFMC stewardship and allowed for continuing support to organizations that are committed to making Monterey County stronger.

25

Daniel R. Baldwin President/CEO

Greg Chilton 2016 Board Chair

# DONORS + GRANTS + NONPROFITS =

HEALTHY, SAFE, VIBRANT

## 



#### PHILANTHROPY BY DESIGN

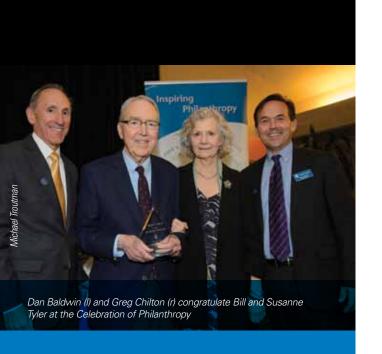
No two people have exactly the same reasons and goals for giving. The Community Foundation for Monterey County (CFMC) crafts individual solutions to help each person achieve his or her unique philanthropic vision. Distinguished Trustee Award Recipient Bill Tyler (see page 3) coined the phrase "design studio for philanthropy" when describing the CFMC, inspiring the theme for this year's annual report: "Philanthropy by Design."

Individuals, families or businesses can meet with foundation staff, learn about charitable giving options and create a plan that works best for them. With tools such as donor advised funds, life-income vehicles such

as charitable gift annuities or charitable remainder trusts, and thoughtful estate planning, donors can make the impact they want during their lifetime and beyond.

It all connects. Donors establish funds and recommend grants. Grants fuel nonprofit organizations and programs in Monterey County and beyond. Nonprofit programs and services help create healthy, safe, vibrant communities.

We invite you to pull up a chair at the table. As Bill Tyler says, "You would be simply amazed at the possibilities."



## "THE CFMC IS A DESIGN STUDIO THAT INVITES YOU TO PULL UP A CHAIR AT THE TABLE. YOU WOULD BE SIMPLY AMAZED AT THE POSSIBILITIES."

– Bill Tyler,2016 Distinguished Trustee

#### CELEBRATING PHILANTHROPY

#### **Distinguished Trustee Award**

For more than 25 years, the Community Foundation for Monterey County has recognized an individual or couple who have demonstrated exceptional commitment to supporting local nonprofit agencies.

In 2016 the Distinguished Trustee award was presented to Bill Tyler for his philanthropic leadership. Bill demonstrated his spirit of giving early in life. During WWII he collected Coke bottles and donated pennies to his local community recreation center for servicemen. He now epitomizes the philanthropic spirit by supporting education, health and the arts. His lead gift to the Tyler Heart Institute at Montage Health inspired others to follow suit to create excellent local cardiac care.

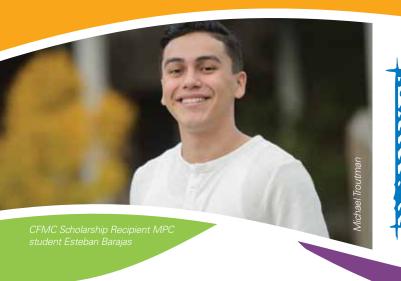
Bill and his wife, Susanne, created two donor advised funds at the CFMC to enhance their philanthropy. The Tyler Visiting Fellowship in Residence Fund supports visiting professors at the Middlebury Institute for International Studies, and the William H. and Susanne S. Tyler Pathway Fund facilitates their ongoing philanthropic interests. Bill summed it up this way: "Everyone can participate in helping others."

#### **Distinguished Trustee Honorees**

- 2016 William H. Tyler
- 2015 Nancy Ausonio
- 2014 F. Robert Nunes
- 2013 Warren Wayland
- 2012 David and Laurie Benjamin
- 2011 Mike and Mary Orradre
- 2010 Bob and Sue Antle
- 2009 Julie Packard
- 2008 Sherrie McCullough
- 2007 Maggie Downer
- 2006 Clint and Dina Eastwood
- 2005 Ed and Terry Haber
- 2004 Michael McMahan,
   Neal McMahan,
   Marsha McMahan Zelus
- 2003 Davis Factor, Jr.
- 2002 Joanne Taylor-Johnson

- 2001 Hilton and Roberta Bialek
- 2000 William and Nancy Doolittle
- 1999 Jim and Jeri Gattis
- 1998 Patricia Tynan Chapman
- 1997 Margaret Owings
- 1996 Basil E. Mills
- 1995 David Packard
- 1994 Harriet R. Thurmond, Sarah T. Hermann
- 1993 Francis H. Cislini
- 1992 Marshall Steel, Jr.
- 1991 Virginia Stanton, Gordon Paul Smith
- 1990 Ruth P. Fenton
- 1989 John A. McCone





"Receiving a scholarship was a big
motivation for me. Any amount of money
always helps and I am extremely grateful."
- Esteban Barajas,

Monterey Peninsula College Student

#### SCHOLARSHIPS

#### **Creating Opportunity**

2016 was a record year for scholarships. We awarded over \$380,000 to 123 students through 31 scholarship programs, (a 33% increase in dollars and 45% increase in students from 2015). Many new scholarships came through corporate partners who wanted to support the education of their employees and their children.

The Morse Foundation Scholarship Fund awarded \$55,000 to 14 children of employees at the Monterey Peninsula Country Club, and Church Brothers/ True Leaf Farms awarded \$35,000 to 14 employees and children of employees to attend college or learn a trade. Our staff worked with leaders in both organizations to determine award criteria, promote the opportunity to employees, collect and review applications and select the recipients.

For those wishing to create opportunity for young people, scholarship funds are one of the most effective and fulfilling ways to give. Scholarship funds can be customized to represent your values and specific areas of interest. Or, for even greater impact, you can co-invest in College Futures Monterey County (right) to reach students with the greatest need.

#### **Designed for Student Success**

At a time when the cost of college continues to rise and the need for higher education has never been greater, it is inspiring to see so many giving generously to support students' dreams of earning a college degree. Our Philanthropic Services team works with families, organizations, and businesses to design scholarship programs that meet their goals, and manages each step from application to award. Scholarships vary from one-time awards of \$500 to a four-year scholarship of \$60,000, and benefit students from public and private high schools throughout the county.

#### **College Futures Monterey County**

In 2016 the CFMC began work on a new initiative to support college attainment - College Futures Monterey County. Through a partnership with CSU Monterey Bay, we are helping high school students prepare academically, apply to the college of their choice, understand and take advantage of financial aid opportunities. This support is paired with a scholarship of up to \$5,000. This wrap-around approach – combining advising, public financial aid, and private scholarships – is an important part of our effort to increase the number of college graduates in Monterey County.

www.cfmco.org/collegefutures

#### Hugo and Dolores Tottino Family Scholarship Fund

For the Tottinos, supporting the community they have long called home is an important value. Their business, Ocean Mist Farms, was co-founded by Hugo's father, Alfred, as California Artichoke & Vegetables Growers in 1924. To give back to the Castroville community, Hugo and his wife, Dolores, established the Hugo and Dolores Tottino Family Scholarship Fund. They annually award \$2,500 each to four students at North Monterey County High School and are happy to be able to instill the importance of an education by providing scholarships to local students.

"This scholarship is given to students who show integrity, quality, passion and success in the their daily life decisions and pursuit of higher education." – Michele (Tottino) Pecci

The Hugo and Dolores Tottino Family Scholarship is one of more than 30 scholarship funds managed by the CFMC with a total value of over \$6.2 million. For more information on creating or applying for a scholarship, visit:

www.cfmco.org/scholarships





#### **WOMEN'S FUND**

#### **Changing Lives of Women & Girls**



The Women's Fund is making strides in its key investment areas - the future of girls and women's economic security.

#### Girls' Health in Girls'



Formed by the Women's Fund in 2012 for girl-led health empowerment, Girls' Health in Girls' Hands (GHGH) is a countywide collaborative of six girl-serving agencies. It helps girls ages 11-18 gain better access to health information, leadership skills and advocacy training. Over 550 girls from 22 sites are participating, and more than 1,500 girls have been impacted since the start of the program.

#### **GHGH Scholarships Created**

At the 2016 Women's Fund luncheon, we took our support beyond high school and created the GHGH Scholarship program. Seventeen scholarships totaling \$30,000 were awarded to GHGH alumnae from participating organizations.

"I now have the financial support to fund my tuition at the University of California, Berkeley. This scholarship is allowing me to achieve my academic and life dreams. I feel so blessed to have organizations like the Women's Fund supporting and believing in students like me," said Bella-Graciela Chavez, GHGH scholarship recipient and UC Berkeley student.



Our vision is that every woman and girl in Monterey County has what she needs to be healthy, confident and able to fulfill her dreams.



#### Women's Economic Security Initiative

WOMEN'S economicsecurity INITIATIVE

The Women's Economic Security (WES) Initiative is a three-year effort designed to help low-income women move their families out of poverty. Through peer-led community groups named "Women in Action" in Salinas, Castroville and Soledad, women are accessing education, training and support services they need. The program is operated by the ACTION Council of Monterey County through a Women's Fund grant.

Since the program began, the women are taking advantage of the opportunities that expand their potential. Participants have increased their confidence and sense of self-worth through achievements in school, taking part in their local PTAs, speaking at Monterey County Board of Supervisors meetings, and even leaving abusive relationships. WES has inspired these women to make positive changes in their lives.

#### www.cfmco.org/womensfund

GHGH is a collaborative program of the Boys and Girls Club of Monterey County in partnership with Girls' Inc., of the Central Coast, Monterey County Health Department, Monterey County Rape Crisis Center, Planned Parenthood Mar Monte and YWCA Monterey County.

#### PLACE-BASED PHILANTHROPY

#### **Affiliate Funds**

Imagine a group of engaged citizens wanting to create a unique resource, one that will have an immediate impact, yet will continue to grow and support future generations. Because Monterey County is large and diverse, we work with, support and empower people in specific geographic areas to design new and targeted ways to strengthen their own communities.

One of the best examples of philanthropy by design is an affiliate fund. These funds are created by local community members. Like a foundation within the foundation, each is led by its own advisory board and serves a specific region in Monterey County. The CFMC handles all administrative details, while the advisory board raises funds and recommends grants for their region.

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

The CFMC's first affiliate fund was created in 2013. The Southern Monterey County Foundation (SMCF) was designed and developed by local residents to give back to King City and points south. 2016 marked the third year of grantmaking, with \$15,000 awarded to eleven grantees. In total, the SMCF has already granted over \$50,000. The SMCF is supported by individuals and business that have joined their "Founding Family" by pledging \$5,000 over the first five years of the foundation. These donations will be split between immediate grantmaking and endowment building.

#### www.cfmco.org/SMCF

#### **Northern Monterey County Foundation**

In 2016, following several community meetings, North County residents created the Northern Monterey County Foundation (NMCF). With an Advisory Board of eleven North Monterey County residents, chaired by local businessman Don Chapin, the NMCF serves the communities of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita. Thanks to the generous donations of Advisory Board members and other philanthropic residents and business, the NMCF quickly raised \$207,000 in donations and pledges. Half of all donations will go to immediate grantmaking, while the other half will build an endowment to create a permanent philanthropic resource. The group will award its first grants in 2017. These competitive grants will support nonprofits and other groups serving North County.

#### www.cfmco.org/NMCF

To learn more, please contact the CFMC at 831.375.9712.



Standing (I to r): NMCF supporters Don Chapin, Linda Grier, Anne Herendeen, Karen Miller, Joe Pezzini, Leslie Austin, John Phillips, Rich Coffelt. Seated: Nancy Ausonio, Lou Calcagno



BECAUSE MONTEREY
COUNTY IS LARGE AND
DIVERSE, WE SUPPORT AND
EMPOWER PEOPLE IN SPECIFIC
GEOGRAPHIC AREAS TO DESIGN
NEW AND TARGETED WAYS
TO STRENGTHEN THEIR OWN
COMMUNITIES.





This year-end giving program
boosts nonprofits and helps
donors leverage their
support through matching funds.

#### MONTEREY COUNTY GIVES! Special Awards

Each year, the CFMC makes three special awards at a Monterey County Gives! grantee gathering in February. In 2016, the Village Project won the \$2,500 Ingenuity Award for its big idea of providing a technology lab to teach children coding skills. Peace of Mind Dog Rescue received a \$1,000 grant for having the most donors, and the Monterey Museum of Art received \$1,000 for having the most donors ages 18-35.

#### **MONTEREY COUNTY GIVES!**

#### **Leveraging Year-End Giving**

Monterey County Gives! has grown from modest beginnings to a record \$3.6 million awarded to local nonprofits in 2016. Gives! has inspired \$12.3 million in donations and grants since the Monterey County Weekly first established its donor advised fund in 2000.

Each fall, Monterey County Gives! focuses on "Big Ideas" from more than 120 local nonprofits. Donors are directed to a website for efficient, simple online giving. Donors can choose the amount of money given and customize the number and kind of causes they wish to support. For many it has become a year-end giving tradition.

In 2016, the total awarded included \$350,000 of match made possible by key support from the Monterey Peninsula Foundation, David and Lucile Packard Foundation, the Neumeier Poma Investment Council, the Cannery Row Company and others. Individuals donors contributed \$471,000 in challenge gifts to help spur support for their favorite nonprofit. Donors appreciate that their gift can have a greater impact through the match. More than 4,200 individuals, families and businesses contributed in 2016, giving a tremendous boost to participating agencies

The growth once again surpassed all expectations. It seems we say that every year. We look forward to saying it again next year.

#### www.cfmco.org/mcgives







MCGives! is a partnership between the Monterey County Weekly, the CFMC and the Monterey Peninsula Foundation. Thanks to Neumeier Poma Investment Counsel, The David and Lucile Packard Foundation and Cannery Row Company for their generous support. The Monterey County Weekly Community Fund is a donor advised fund of the CFMC.





"WE CAN GIVE BOTH LOCALLY
AND OUTSIDE THE AREA
AND INVOLVE OUR FAMILY.
IT'S NEVER TOO EARLY TO
BEGIN BUILDING HEALTHIER
COMMUNITIES."

- Bill and Adriana Hayward,
Donor Advised Fund Holders

## BUILDING HEALTHIER COMMUNITIES

#### The Hayward Family

Bill and Adriana Hayward were inspired early in life by their parents. They were role models who gave thoughtfully and generously to causes that mattered to them. The Haywards count themselves very fortunate to be part of successful family businesses, which now involve the fourth and fifth generations.

#### **Sharing their Values**

Bill and Adriana are intentional about passing their values to their five children. At an annual family meeting, Adriana coordinates teambuilding exercises across generations, which always involve a philanthropic component. "The children see us volunteer and we volunteer as a family. They know that giving even a little bit can make a difference," explains Adriana.

#### **Giving Time**

Adriana, a licensed clinical psychologist, participates in Rachel's Network, an organization concerned with global environmental sustainability. She also gives of her time locally, serving on the boards of the SPCA of Monterey County, the Monterey Museum of Art, and the Monterey Peninsula Ballet Theatre. Bill is currently chair of the Nancy Eccles and Homer M. Hayward Foundation, and Chair Emeritus of the Forestry Stewardship Council. Growing up in the lumber business, he was struck by the importance of maintaining healthy forests, and their impact on the environment. As CEO of Hayward Lumber, he pioneered sustainability in the 1990's and continues to be an industry leader in green building products.

#### **Giving Back**

Adriana's love of nature began as a child. She cares deeply about animals, supporting Saving the Sea Otters as a teenager. In addition to animal welfare, they use their donor advised fund at the CFMC to support youth, the arts and of course, the environment.

#### **Healthy Homes**

After a family experience with illness caused by environmental factors in their home, the Haywards researched solutions. They built a house with continuous fresh air, non-toxic products, and other features, creating a new standard. Together, Bill and Adriana are working on the nexus between human health and the built environment. Their family mission is to "help families live healthy." See more of their story at www.haywardhealthyhome.com, where a free new tool, the HaywardScore.com, teaches families how their home may be impacting their health.



"It's amazing how the Community
Foundation brings diverse people and
passions together. They look out for the
investments and give us good ideas of
programs to fund. When the CFMC is
involved we have confidence."

- Adriana Hayward, CFMC Donor Advisor





#### LEAVING A LEGACY

A planned gift is one of the most meaningful and personal ways to give. With thoughtful estate planning, you can rest assured your philanthropic resources will communicate your values, experiences and interests and benefit the causes that matter to you most.

#### **Stewardship**

The Community Foundation for Monterey County fullfills each donor's wishes so you can have peace of mind knowing your intentions will be honored in the future. Dale Meyer, CFMC donor advised fund holder and 2016 Legacy Luncheon speaker, noted, "It's gratifying to know that the endowed fund will go on in

perpetuity, meaningfully and purposefully. The Community Foundation has been pivotal to my family as a partner in philanthropy."

#### **The Legacy Society**

The Legacy Society honors those who have named the Community Foundation for Monterey County in their estate plan, contributed more than \$25,000 to an endowed fund, or established an endowed fund during their lifetime. Members are invited to an annual luncheon to learn about the impact of legacy giving.

If you have included the CFMC in your estate, please let us know so we may recognize your generosity. Legacy Society members may also choose to remain anonymous.

The CFMC's Guide to Planned Giving can help you explore the many available options to create your own legacy of giving, from retirement plans and estate gifts, to gifts that offer income such as charitable remainder trusts or charitable gift annuities. Please call 831.375.9712 to learn more.

#### www.cfmco.org/legacy

Anonymous (7) Mrs. Wilber K. Amonette\* Tonya and Rick Antle Yvonne A. Ascher and Leonard Laub Tony Ayres Daniel R. Baldwin and Anne Ylvisaker Robert P. Balles Nancy L. Bartell John B. Berain Paul P. Bianchi Nancy Bletzer Joyce Blevins and Katherine M. Coopman James W. Bogart

James W. Bogart
Thomas Bohnen
Jay and Ann Brown
Julie A. Cason and
Lisa K. Crawley
Joseph\* and
Betty Chaffers
Mishka Chudilowsky
and Henry Azama
Arthur Connell\*
Julie Conrad
Leland\* and
Gloria Dake
Robert N. Danziger and
Martha Drexler Lynn

Margaret D'Arrigo-Martin

Larry Davidson and
Beverly DekkerDavidson, Dekker
Davidson Foundation
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
Lowel I. Figen\*
Cyrus and Jean\* Fitton
Crawford E. and
Linda P. Fov

Susie and Charly Franklin Joel S. and Dena Gambord

James and Jeri Gattis Donald and Frances Gaver Lupe Gomez Rodney Guilfoil\* Terry Haber Ruth Hartmann Peter C. Hatton Virginia O. Hawes Dick Hawkinson\* Thomas Hawley Carol and Don Hilburn Richard Hobley and

Richard Hobley and Deborah Steel Jeffrey and Amanda Holder

Jeanne S. Holmquist Robert and Millie House Chris and Toula Hubbard Jack Jewett Craig and

Christine Johnson Joanne Taylor Johnson Mark and Susan Johnson Colburn and Alana Jones Deborah Juran Karen D. Kadushin Mary Ann Kane Rick and Martha Kennifer Alice V. Kinsler Paul Lawrence\* and

Marion Buccafurni Douglas C. Lee Laurel Lee-Alexander Jennifer Levey David S. and

Norma Lewis Esther H. Lindsey Robert H. Lindsey Janette Loomis Todd Lueders Valera W. Lyles Tom 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 McAlister Sherrie McCullough Terry A. McHenry and Joan Smith McHenry

Joan Smit Michelly
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

Charles Olvis and Miranda Morris Mike and Mary Orradre Nicholas M. and Nicollette Pasculli Ken Petersen 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 Jean Rudolph\*, The

Lauralie Irvine
Foundation
James C. Sanders
John C. Sanders
Kenneth C. Schley
Carol Shade
JeriAnn Shapiro
Connie Shelstad
Robert B. Sheppard\*
Janet L. Shing
Sidney Sue Slade
Madison Smith\*
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
Fredrick W. Terman
and Nan Borreson
Brian Thayer
Peter and Anne Thorp
Vincent and Evelyn\* Torras
William H. and

Susanne S. Tyler, III
Patricia Tynan-Chapman
William Umeki
James R. Valentine
Robin Venuti and
Joseph Rock
Arlene Wall
Jacqueline Wendland
Benjamin and Mary
Ann Whitten
Nels and Jill Wiegand
Martin Wolf
Kenneth and Mary Wright

Richard Zahm\*
\*In Memoriam



#### SOBERANES FIRE FUND

#### **Relief, Recovery & Rebuilding**

The blaze that began with an illegal campfire on July 22, 2016 grew rapidly, creating the most expensive wildfire in U.S. history. Thankfully the philanthropic response was also swift. The Soberanes Fire Fund was created within 72 hours after the fire began to provide resources for relief, recovery and rebuilding.

In addition to individual contributions, dozens of fundraising events created outlets for community support (see page 24). More than 8% of the gifts came from individuals outside California and even other countries.

"We're proud to be in a position to facilitate a philanthropic response when disasters happen," said Dan Baldwin, CFMC President/CEO.

#### **Gifts & Grants**

More than \$980,000 was donated with gifts as small as \$5 and as large as \$110,000. A special volunteer grant committee, made up of veteran grantmakers and people from Big Sur, worked to award grants totaling \$517,370 in 2016. An additional \$438,000 was granted through May 2017.

#### Relief

Donations supported immediate relief to evacuees, property owners, renters and caretakers who suffered a complete loss. Volunteers also donated their time, working side by side with Palo Colorado neighbors to assist with ash and debris removal.

#### **Recovery**

In the recovery phase, grants supported repair and replacement of water systems, reimbursement to property owners, and inspection and repair of burnt out septic systems.

#### Rebuilding

Repair and maintenance of shared private roads remains a key concern. Already a problem before the rains, roads were damaged further due to flooding and debris from winter storms. Grants have supported culvert repair, replacement and maintenance with gravel, road base, and plastic to stabilize areas until permanent repairs can be made.



"The residents of Palo Colorado are very grateful for the community support."
- Patte Kronlund and Jerri Hansen,
Coast Property Owners Association
Advisory Committee



#### Soberanes Fire Fund Grants\* \$954,046 Awarded

Coast Property Owners Association (CPOA) \$10,000 - Relief to displaced residents CPOA \$30,000 - Relief for property owners who lost their dwelling CPOA \$25,000 - Relief for property owners, renters and caretakers who lost their dwelling Community Emergency Response Volunteers of the Monterey Peninsula \$10,000 & \$20,000 - Relief to Carmel Valley residents displaced by the Soberanes Fire CPOA \$306.72 - Reimbursement for bottled water for Palo Colorado residents Middlebury Institute for International Studies at Monterey \$20 - Spanish translation for fire victim resource guide

Mid-Coast Fire Brigade \$36,756.40 - Water tanks and community signage

CPOA \$120,000 - Water system subsidy for uninsured or underinsured property owners
CPOA \$24,000 - Septic system inspection fees for uninsured or underinsured property owners
Boy Scouts of America Silicon Valley Monterey Bay Council \$18,000 - Fire
management plan and tree removal equipment for Camp Pico Blanco
CPOA \$24,610 - Support for artisan food producers from Cultura Carmel Fundraiser
Big Sur Land Trust \$50,000 - Restoration projects at Mitteldorf Preserve

CPOA \$97,353 - Road repair and replacement of culverts to prepare for winter rains

CPOA \$50,000 - Ash & debris removal in Palo Colorado

**CPOA \$50,000** - Emergency road repair due to winter rains

**CPOA \$200,000** - Reimbursement of immediate relief and ash and debris removal **CPOA \$188,000** - Ongoing rebuilding; residential water system repair, ash, debris and hazardous waste removal, road reconstruction



#### GRANTMAKING OVERVIEW

#### \$15.4 Million Awarded

In 2016 the CFMC, together with its donor advisors, distributed over \$15.4 million through 1,076 grants to 503 agencies working towards healthy, safe, vibrant communities.

#### **Community Impact Grants**

Field of interest and unrestricted funds, created by generous donors through their estates, fuel the CFMC's competitive grantmaking programs. The CFMC board of directors approved more than \$2.7 million in grants through the foundation's competitive programs and leadership initiatives. These philanthropic resources combine to strengthen organizations that serve Monterey County's children and youth, provide health and human services, enhance arts and culture, and support community development, animal welfare and the environment.

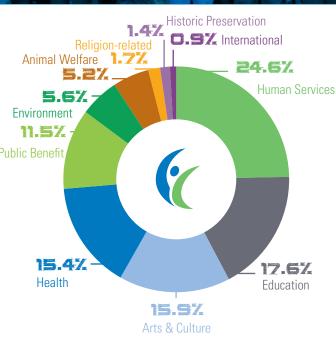
#### **Partnering with Funders**

The CFMC appreciates our continuing collaboration with local funding partners. Grants from the College Futures Foundation, Claire Giannini Fund, Monterey Peninsula Foundation, Nancy Buck Ransom Foundation, the David and Lucile Packard Foundation, Tanimura Foundation and Vanguard Charitable enhanced CFMC programs and initiatives.

#### **Beyond Grantmaking**

The CFMC also strengthens the nonprofit sector beyond grantmaking. The Center for Nonprofit Excellence (CNE) works with nonprofit staff, board and volunteers to expand nonprofit capacity and sustainability.





#### **GRANTS BY PROGRAM AREA**

Human Services	\$3,793,794
<b>Education</b>	2,720,798
Arts & Culture	2,459,860
Health	2,385,663
Public Benefit	1,778,233
Environment	868,911
Animal Welfare	803,757
Religion-related	265,768
Historic Preservation	219,763
International	144,870

\$15,441,416



#### **Center for Nonprofit Excellence**

Based on their needs and interests, nonprofits can take a customized approach to boosting their effectiveness. Of the 158 organizations CNE served in 2016, many engaged in multiple offerings. Sun Street Centers, for example, attended workshops, sent staff to LEAD Institute and received an Organizational Development grant. They also worked with pro bono consultants through Stanford Alumni Consulting Team to strengthen their business plan and prepare for growth. When you put it all together Anna Foglia said, "The CNE is a crucial resource to us and an important part of our enhancement as an organization!"

#### STORIES OF IMPACT

The Community Foundation for Monterey County invests in local nonprofits meeting needs throughout Monterey County. Grant committees, made up of CFMC board members and community volunteers, review proposals and select projects with the greatest potential to make a meaningful difference. View recent Community Impact grants on our website.

www.cfmco.org/recentgrants



"Philanthropy fuels grants.

Grants create impact. Impact attracts resources."

- Dan Baldwin.

CFMC President/CEO



## Children and Youth Hartnell College Foundation

\$25,000 for STEM K-12 enrichment

Young innovators have the chance to put down computer games and start creating them thanks to STEM programming through Hartnell College's NASA and Coder Dojo programs. A \$25,000 Community Impact grant to the Hartnell College Foundation provided STEM (science, technology, engineering and mathematics) classes for up to 6,000 students during the summer and school year in Monterey County.

"The United States has built its leadership in engineering and technology through brilliant innovators in the fields of STEM," said Jackie Cruz, Hartnell College Vice President of Advancement and Development. "These fields feed our medical, agricultural, and technology-based jobs. Today, we're faced with a shortage of young adults entering STEM-related fields, and we're addressing this concern at the community level."

The program has expanded to rural parts of Monterey County by partnering with school districts in Northern and Southern Monterey County. "A child engaged in Hartnell's K-12 STEM programming will have accumulated close to 50 hours of hands-on, after-school STEM experiences," says Cruz.

#### Health and Human Services Legal Services for Seniors

\$15,000 for no-cost legal services for local seniors

Seniors are prime targets for scams, denial of benefits and other legal problems that threaten their health, housing and livelihoods. "Legal recourse is hard to come by when living in poverty or on fixed incomes," said Kellie Morgantini, Executive Director of Legal Services for Seniors.

A \$15,000 grant provided professional no-cost legal services to Monterey County's seniors in most areas of civil law including health care and insurance, Medicare, Medi-Cal, Social Security disability, housing, public benefits, consumer protection, financial and physical elder abuse, probate guardianship of minor children, wills, advance health care directives and even court representation.

"Eighteen percent of Monterey County's seniors live in poverty. Many are denied equal access to justice because they cannot pay an attorney and pay for the necessities of food, clothing, shelter and medical care at the same time. If LSS were not here to help our seniors in need address their legal problems, those problems would escalate, run unchecked and could eventually result in deteriorated health and potentially homelessness," said Morgantini.



## Community Development Catholic Charities of the Diocese of Monterey \$30,000 for immigration services in Southern Monterey County

In the last six months of 2016, political uncertainty caused an unprecedented surge in people seeking out immigration services from Catholic Charities of the Diocese of Monterey.

"It's very serious," said Terrie Iacino, Executive Director of Catholic Charities. "We have been flooded with immigrants coming in for information – needing to know their rights, where they stand and what they should do in the event a family member is stopped and asked about their status."

A \$30,000 grant supported immigration services and allowed for expansion to Greenfield to serve Southern Monterey County communities. lacino says stories of children being kept home from school and people fearful of families being broken up by deportations are true, and that the change in immigration policies is prompting long-time green-card holders and others to take citizenship classes to get on the pathway to citizenship. The organization has about 2,000 active immigration cases, and has qualified close to 700 others for Deferred Action for Childhood Arrivals (DACA). "We let our clients know that regardless of what happens, we will walk the road with you, wherever it leads." lacino said.

#### **Environment MEarth**

\$25,000 for environmental education programs for underserved youth

Monterey County has a reputation for being the "Salad Bowl of the World." A closer look in the produce crisper of your refrigerator will reveal that much of your salad, broccoli and strawberries are produced locally. Yet there's a disconnect with healthy foods failing to reach the dinner tables and lunchboxes of local children in need of nutritious foods.

"There is increasing cultural and economic disparity, lack of nutritious food options, access to nature and education about healthy and sustainable lifestyle choices," said Tanja Roos, MEarth Executive Director. "It's resulting in systemic issues of nature-deficiency and obesity for our children where in Monterey County alone, 44.6% are overweight or obese."

A \$25,000 grant provided funding for programs to teach local youth about healthy lifestyle choices through programs such as FoodConnect, NatureConnect, ClassroomConnect, School FieldTrips, Summer Day Camps, and Carmel River Stewardship Projects. Participants include elementary and middle school students from more than ten elementary schools in Salinas and Monterey. "It is our goal that children not only incorporate the healthy habits they learn in their own lives, but to 'teach up' by inspiring behavior changes in their homes, schools and community." Roos said.

#### Arts and Culture First Night Monterey

\$10,000 for free arts education classes and community events

First Night Monterey (FNM) is known for the annual New Year's celebration in downtown Monterey, but there's much more to the organization than a one-night event on the Peninsula.

A \$10,000 grant supported FNM's Greenfield Cultural Arts Center (GCAC). The center holds weekly traditional dance and visual art classes. A local Oaxacan group uses the facility for traditional language and dance classes. All workshops and classes are free for Greenfield residents. Weekly programs serve more than 80 youth and 30 adults.

"The new center has been designed as a cultural facility for the programming, production, presentation, and exhibition of traditional dance, film, literature, visual arts and music," said Ellen Martin FNM Executive Director. Since 2010, FNM has also produced the Greenfield Harvest Festival, a free community celebration of art and culture, annually attracting over 5,000 attendees in a family-friendly, alcohol-free event. "We see the GCAC as an important anchor for the community to foster cultural identity and connection for the residents of Greenfield." Martin said.



#### **DUR FAMILY OF FUNDS**

The CFMC holds more than 450 funds created by individuals, families and businesses. Funds can be established to benefit specific organizations, causes, geographic areas, scholarships or unrestricted to respond to changing needs. The CFMC is a steward of both the charitable assets entrusted to us and each donor's philanthropic vision. Please call us at 831.375.9712 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.

**Northern Monterey County** Foundation\*

**Northern Monterey County** Foundation (Non-endowed)\*

Southern Monterey County Foundation

Southern Monterey County Foundation (Non-endowed)

#### **Agency Endowment Funds**

Nonprofit agencies benefit from participation in the CFMC's investment pools, help with planned giving, and grow their sustainability. 39 Craftsmen Fund for Monterey County Youth Museum
All Saints' Day School Endowment

Fund\*\*

Alliance on Aging Endowment Fund Alzheimer's Association of Monterey County

Big Sur Health Center Endowment Fund

The Big Sur Land Trust Conservation Fund

Blind and Visually Impaired Center

Laurie Boone Hogen Appreciation Fund for Excellence in Teaching (All Saints' Day School)

The Boys and Girls Club of the Monterey Peninsula Fund Carl Cherry Center for the Arts Fund Friends of the Carmel Valley Library

Fund Carmel Music Society Endowment

Carmel Public Library Foundation

Fund Carmel Public Library Foundation -

Children's Fund Carmel Woman's Club Fund

Casa Amesti Foundation Building **Endowment Fund** 

Casa Amesti Garden and House

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

Colleagues of the Arts **Endowment Fund\*** 

Community Partnership for Youth Fund

Elkhorn Slough Foundation, Inc. Fund

Fred Farr & Edwin Bliss Buckeye Memorial Fund

Fenton Founders' Fund for Youth Music Monterey

Food Bank for Monterey County Endowment 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.

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

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Operating Endowment Fund of the CFMC

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Robinson Jeffers Tor House Fund Tularcitos Parent Teacher

Organization Fund Director Emeritus Richard Tyler Scholarship Award

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

#### **Agency Stewardship Funds**

Agencies benefit from participation in the CFMC's investment portfolios, and maintain access to the fund's principal.

1984 Fund Friends of the Andy Ausonio Library Stewardship Fund

Big Sur Health Center Stewardship

#### **Big Sur Land Trust Carmel River** FREE Stewardship Fund\*

Carmel Heritage Society Stewardship Fund Carmel Woman's Club Stewardship

Fund

#### Stewardship Fund for the Center for Photographic Arts\*

Chamber Music Monterey Bay Stewardship Fund

CHISPA Stewardship Fund\* Church in the Forest Stewardship

Fund Community Human Services

Stewardship Fund Carmel Valley Kiwanis Foundation Stewardship Fund

Friends of Carmel Forest Stewardship Fund\* Friends of the Carmel Valley Library Stewardship Fund\*

Del Monte Forest Conservancy Fund

Girls Inc. Stewardship Fund

Jacob's Heart Children's Cancer Support Services Stewardship Fund

Japanese American Citizens League of Monterey Peninsula Stewardship Fund

Kernes Adaptive Aquatics Stewardship Fund

LandWatch Monterey County Stewardship Fund Sun Street Centers' Anne C Leach

Scholarship Fund **Legal Services for Seniors** 

Stewardship Fund\* Friends of the Marina Library

Stewardship Fund Meals on Wheels Salinas Valley Stewardship Fund\*\*

Methodist Foundation of Pacific

Grove Stewardship Fund Peace of Mind Dog Rescue

Stewardship Fund Pacific Grove Public Library Foundation Stewardship Fund

**Pacific Grove Public Library** Foundation Stewardship Fund II\*

Pacific Grove Public Library Fund for the Future\*\*

Museum Foundation of Pacific Grove Stewardship Fund Rancho Cielo Youth Stewardship

Fund Monterey County Rape Crisis Center Stewardship Fund

Learning Opportunities Endowment Fund for Scottish Fiddlers of California

Shelter Outreach Plus Stewardship Fund

Sarah Spencer seed money for the Center for Photographic Art\*\* Sun Street Centers Stewardship Fund

#### Salinas Valley Memorial Hospital Foundation Stewardship Fund \*

Friends of Sunset Foundation Stewardship Fund\*\* Temple Beth El Stewardship Fund

United Way Monterey County Stewardship Fund\*

Central Coast Veterans Cemetery Foundation Stewardship Fund

#### Visiting Nurses Association and **Hospice Stewardship Fund\***

Central Coast VNA and Hospice, Inc. Stewardship Fund Voices for Children Stewardship Fund

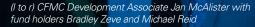
Central Coast Young Men's Christian Association Stewardship Fund

YWCA Monterey County Stewardship Fund

## "THE CFMC IS A TRUE PARTNER IN PHILANTHROPY"

- Birt Johnson, Jr.
CFMC board member and
Donor Advised Fund Holder







#### **Company Funds**

Businesses simply their giving and receive tax advantages and customized support to maximize their community philanthropy. The Carmel Realty Foundation

Mission Ranches Fund\*

Monterey County Weekly Community Fund Nepenthe/Phoenix Corporation Fund

#### **Designated Funds**

Donors can support a designated agency or agencies over time with a permanent, protected stream of operating income.

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Arts Council for Monterey County Endowment Fund

Tony P. and Marjorie Ayres Fund Nancy Parker Benham

Endowment Fund

Central Coast Lighthouse Keepers
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Cislini Fund

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The Gloria S. Daly Endowment Fund for All Saints' Episcopal Day School

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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 Maud Porter Work Rose Garden

Fund
Carl Young Memorial Earth
Science Endowment Fund
YWCA Endowment Fund

#### **Donor Advised Funds**

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

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Somero Fund Friends of Community Animal Services Fund

Anonymous Donor Temporary Fund Rick and Tonya Antle Fund Ausonio Family Fund

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Howard Franklin Bowker Numismatic Projects Endowment Fund\*\*

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McMahan Family Fund
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McMahan Fund
Marjorie McNeely Fund for the
Blind or Illiterate

#### **FIELD OF INTEREST FUND**

## Terry Layne Fund for Beach Protection

Colonel Dorothea "Terry" Layne loved Carmel beaches. The windswept landscape, churning waters and rugged beauty prompted the Carmel resident to set up a special field of interest fund, the "Terry Layne Fund for Beach Protection."

The beauty that drew Layne to local beaches, last year attracted 1.1 million people to Point Lobos. The crush of people, long line of cars and off-trail use have caused soil erosion, trampling of native plants, build up of tide pool sediment and a myriad of environmental problems that have impacted its beaches.

Since Layne's passing in 2011, the fund has made grants in her interest area, including \$25,000 to the Point Lobos Foundation for construction of trails and rope barriers to keep visitors contained to bluffs and marked trails.

"This is a bucket-list place, but trails are being eroded at a rate we just can't keep up with," said Stephen Bachman, California State Parks Senior Park and Recreation specialist. "A little thing like signs and barriers goes a long way to get people to stay on trails, and keeps the sediment from ending up on the beaches."

A field of interest fund allows donors to specify charitable areas of interest and the CFMC makes grants to organizations making a difference in those areas. Terry Layne's field of interest fund continues to do vital work on her behalf. Richard and Grace Merrill Fund\*

Lenore and Dale Meyer Fund Malcolm and Joanne Millard Fund James I. and Barbara S. Miller Charitable Fund\*\*

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#### **Field of Interest Funds**

Donors specify a charitable area of interest and the CFMC awards grants to local nonprofit organizations

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Stewardship Fund Jean P. Fitton 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 Non-Endowed Fund

The Fund for Homeless Women Terry Layne Fund for Beach Protection

Literacy Campaign Fund 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

June P. Sheppard Fund for the Performing Arts\*

Siembra Latinos Fund\*\* Dr. Frank Pye Smith Medical Facilities Fund

Katherine Curtis Springer Fibromyalgia and Chronic Fatigue Syndrome Patient Support Fund

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Tri-Counties Blood Bank Fund Anita Tarr Turk Fund for Breast Cancer Research

Women's Fund Endowment Youth Fund

#### **General Endowment Funds**

These funds provide philanthropic resources for CFMC community grantmaking.

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The Donna Roop Endowment Fund The Scott Fund

Clvn & Pamela Smith Fund\* **Evelyn Torras Fund\*** CFMC Trustees Fund

#### **Private Foundation Funds**

These funds offer a customized blend of administrative support plus tax advantages, increased flexibility and personalized philanthropic services

The Joel and Dena Gambord Charitable Foundation The Morse Foundation Stewardship Fund

The David and Lucile Packard Foundation Fund

S.T.A.R. Foundation of Monterey County Stewardship Fund Robert N. & Florence Slinger Foundation Fund

The Alexander F. Victor Foundation

#### **Scholarship & Award Funds**

Donors invest in the future of local students with the help of CFMC

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 Big Sur Fiddle Camp Scholarship Fund\*

The Bissell Fund James Bliss & Annette Sward Forestry & Nursing Scholarship Fund

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Carol C. W. Butterfield Bacon Scholarship Fund

The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship

#### Jack Van Zander Cal Alumni Memorial Scholarship Fund\*

California Polytechnic State University Agriculture Business Department Endowment Fund Carmel High School Class of 1952 Fund

#### CHISPA Scholarship Fund\* **Church Brothers-True Leaf** Farms Scholarship Fund\*

Bill Clapper Memorial Music Scholarship Fund

**College Futures Monterey** County Fund\* Raymond H. Costa Family **Scholarship Fund\*** 

The Nancy Wheelis Dodd Fund Drezner Family Scholarship 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 Joel and Dena Gambord Nursing Scholarship\*

#### Girls' Health in Girls' Hands Scholarship Fund\*

The Allen S. Griffin Fund Geraldyn R. Griffith Memorial Scholarship Fund

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Libby Olver Scholarship Fund\* Dr. Gladys M. Olvis Scholarship

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San Ardo Foundation for Education Theodore R. Sarbin Research and Scholarship Award Fund

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Robert Stanton Award Fund Rotary Club of Monterey Martin/ Hurd Scholarship Fund\*\*

Wilbur H. and Maxine D. Stevens Scholarship Fund

**Hugo and Dolores Tottino** Family Scholarship Fund\*

Charles Joseph Watts Scholarship Fund Shelley Watts Scholarship Fund Horace H. Wilson Scholarship Fund

#### **Special Purpose Funds**

These funds are established for specific projects or initiatives with a limited time frame.

Alert Monterey County Fund Big Sur Relief Fund\*\* Center for Nonprofit Excellence Central Coast Veterans Cemetery Foundation

**College Futures Foundation** 

Community Leadership Project King City Recreation

Commission Forden Park Playground Fund\*

Rudolph E. Futer Restricted Purpose Fund

**Gathering for Women Capital** Campaign\*

Girls Health Initiative

Friends of Laguna Seca Capital Campaign\*

Monterey County Development Professionals Fund\*\* The Monterey Experience Project

Fund Pathways to Safety Soberanes Fire Fund\*

Tassajara Fire Fund

#### \*New Fund Created in 2016

\*\* New Fund Created in 2017

www.cfmco.org/waystogive



"Monterey County is very fortunate to have an organization like the CFMC. We appreciate their expertise and countywide focus. We know they will watch over our gifts so they will achieve our goals in the future."

– Mike & Mary Orradre (I)
 Donor Advised Fund Holders, Legacy Society Members

"Our decision to be Legacy Society members was based on our knowledge of many years of outstanding work by the CFMC in supporting the charities of Monterey County. We are confident that our endowment will be used wisely and in a responsible manner on behalf of local charities. We are very proud to be a part of this wonderful organization."

- Bob & Millie House (r), Legacy Society Members





"The Community Foundation has consistently demonstrated integrity and competence. We have found the CFMC a wonderful place to establish a philanthropic legacy."

– David & Laurie Benjamin (I)
 Donor Advised Fund Holders, Legacy Society Members

"We first looked into establishing a family foundation. Instead, we choose a donor advised fund in which our daughters are coadvisors. It provides an ideal solution without any administrative burden. It helps us plan for ongoing giving and offered additional tax benefits, since we were able to contribute highly appreciated assets."

Bill & Emmy Reese (r)
 Donor Advised Fund Holders



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Carmel Valley Kiwanis Foundation

Friends of the Carmel Valley
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Casa Amesti Foundation Building Endowment Fund

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Casa Amesti Garden and House Fund

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"Our company has always had a focus on philanthropy. We're excited to take it to the next level through our partnership with the Community

Foundation."

– Bill and Vicki Mitchell

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Now in its fourth generation in local real estate, the Mitchell Family, co-owners, have made giving back a key component of their company's culture.

"We have a strong foundational belief that you share your success and give back to the local community that has given you so much," says Bill Mitchell, co-owner, Carmel Realty Company and CFMC board member.

The company partnered with the CFMC to establish the Carmel Realty Foundation, a company donor advised fund to streamline their giving. "Rather than the expense and burden of a private foundation, it allowed us to simplify what we were already doing. It's even increased our giving since it's made it so much easier," noted Bill.

CRC also builds on their employees' generosity through a matching gifts program which the CFMC administers. In 2016 they made grants to the Soberanes Fire Fund, in addition to supporting youth, arts, health and other areas.

www.cfmco.org/companyfunds

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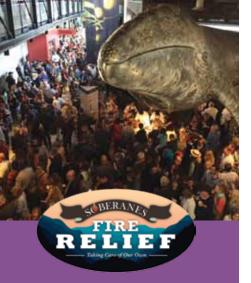
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#### **SOBERANES FIRE Community Response**

"It's about people helping people," says CFMC President/ CEO, Dan Baldwin.

From individual donors to local businesses, the outpouring of support for Soberanes Fire victims was broad and deep. The epic fundraiser at the Monterey Bay Aquarium coordinated by Downtown Dining and local restaurants and wineries generated record-breaking evening attendance and more than \$100,000 for the fund to build early momentum.

Restaurants from Cultura Carmel to Chipotle held benefits. Golf events, pancake breakfasts, wine tastings and concerts were held. Local artists and retailers stepped forward to host fundraising efforts to benefit the Soberanes Fire victims. All told, over \$980,000 was raised, (see page 10).

These pages include a list of individual donors. We thank all those who hosted events and the patrons that supported them. The residents affected by the fire are deeply grateful for the support they have received.



Dan Baldwin (r)

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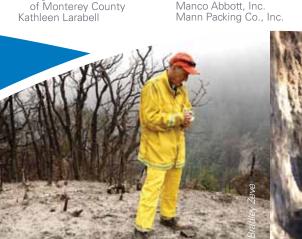
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(I to r) Dan Baldwin surveys fire damage,

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\*In memoriam

This list represents our 2016 donors. If there are any errors or omissions, please contact us at 831.375.9712 so we may recognize your generosity.





CFMC Investment Committee: Seated (I to r) Bill Sharpe, Ken Petersen, Teri Belli, David Benjamin. Standing (I to r) Steve McGowan, Craig Johnson, Dan Baldwin, Jeff Eikenberry, Steve Dart. Not pictured: Bill Doolittle, Anne Westrich (Verus)

#### INVESTMENT STEWARDSHIP

The board of directors and staff of the CFMC steward the charitable assets entrusted to us for the betterment 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.

CFMC fund holders now have three investment options to choose from. In addition to the Primary Portfolio and Medium Term Fund, the ESG (Environmental, Social and Governance) Portfolio, for those who prefer socially responsible investments, was added in 2016.

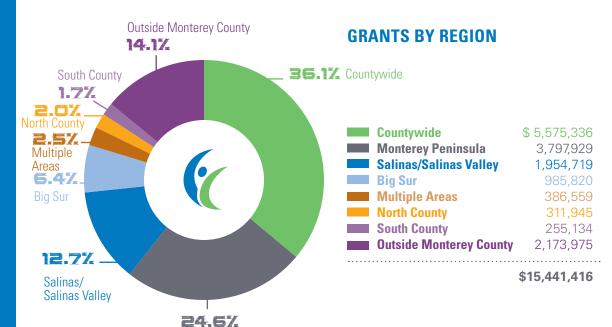
www.cfmco.org/finances

#### GRANTS BY THE NUMBERS

The record \$15.4 million granted in 2016 was distributed from a variety of fund types to many different program areas. Below is a breakdown of the type of grant awarded and grants by geographic region. For a list of grants by program area, please see page 11.

#### **TYPES OF GRANTS**





Community Impact

Monterey Peninsula

## COMMUNITY FOUNDATION FOR MONTEREY COUNTY

CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FORTHEYEAR ENDED DECEMBER 31, 2016

#### CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2016

#### **ADDITIONS**

Contributions* Other income	\$22,796,222 260,497
Total revenues and support	23,056,719
INVESTMENT GAIN	10,650,197
GRANTS AND EXPENSES Grants* Other operating expenses	14,145,577 3,011,665
Total grants and expenses	17,157,242
INCREASE IN NET ASSETS	16,549,674
NET ASSETS Beginning of year	150,578,654
End of Year	\$167,128,328

<sup>\*</sup> net of contributions received and grants disbursed on behalf of nonprofit agency and stewardship funds

#### **ASSETS**

Cash and equivalents	\$11,219,874
Contributions receivable	1,643,353
Other assets	32,732
Property and equipment, net	3,273,461
Investments, carried at market value	
Mutual funds and equities	159,545,229
Cash and money market funds	4,513,612
Charitable gift annuities	390,466
Beneficial interest in remainder trusts	
administered by other trustees	2,730,408
Investments held in charitable remainder trusts	24,614,873

Total assets	207.964.008

#### LIABILITIES AND NET ASSETS

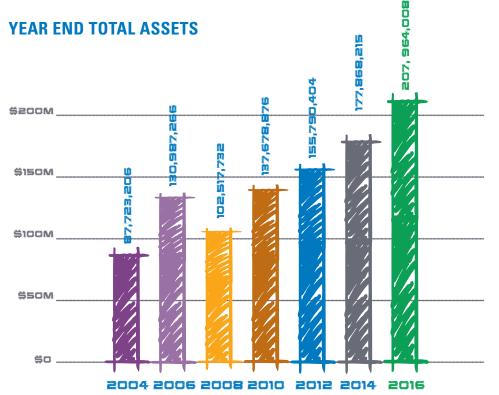
Grants payable	1,969,780
Accounts payable and accrued expenses	107,865
Liabilities under split-interest agreements	
and charitable remainder trusts	18,154,949
Funds held for others	20,603,086

Total liabilities 40,835,680

Total net assets

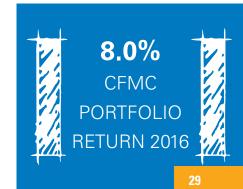


Confirmed in Compliance with National Standards for U.S. Community Foundations Member, League of California Community Foundations The condensed financial information was prepared based upon audited financial statements prepared by Hutchinson and Bloodgood LLP.





\$167,128,328



#### LEADERSHIP



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#### We are especially grateful to:

Tonya Antle, Stephen Dart, Gail Delorey, James Panetta, Judge John M. Phillips and Raul Rodriguez for their board service, which ended in 2016.

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Susie Polnaszek, Program Officer Julie Conrad, Administrative Services Manager Laurel Lee-Alexander, Vice President of Grants and Programs Christine Dawson, Vice President of Philanthropic Services Aurelio Salazar, Jr., Program Officer and Latino Philanthropic Services

Not pictured: Minnie Elliot, Administrative Coordinator

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CFMC staff present Neighborhood grant to African American HIV/AIDS Wellness Group





## "WE ARE FINDING THE COMMUNITY FOUNDATION TO BE A WONDERFUL GUIDE AS WE BEGIN OUR PHILANTHROPIC JOURNEY."

- Giff and Pam Lehman

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## PARTNER WITH US

Individuals, families, nonprofits and businesses can make a difference and enhance their philanthropy through a fund at the Community Foundation for Monterey County in three simple steps.

#### START A FUND It's simple











CREATE

Our team works with you to create a fund that reflects your charitable vision. Establish the fund in your name, your family's or company's name, in honor of a loved one, or have it be anonymous.

You choose the assets to make a gift to create the fund. Cash, publicly traded securities, closely held stocks, real estate or tangible personal properties are often used. You can also direct a gift from your will or trust to create or add to a fund.

Recommend grants from the fund. We can help you make a difference on issues and causes that matter to you most, anywhere in the world.

#### WHEN TO BEGIN

While anytime is a good time, consider a fund when:

- A financial event occurs (such as the sale of business or estate gift) and you are about to receive new assets
- You update your will or trust
- It is tax-wise to make a gift before year-end
- You are thinking about creating a private foundation

A fund performs much like your own private foundation, but without any of the legal or administrative burdens. It can be created in a matter of hours at no start-up cost to you, compared to the time and financial expense required to create a private foundation. Your gift of \$5,000 or more can create a donor advised fund today.

#### JOIN US!

Give us a call at 831.375.9712 or visit our website.





#### THANK YOU!

Our accomplishments are only made possible through your support.

#### **2016 HIGHLIGHTS**

Monterey County Gives!

Record Grants

\$15.4 MILLION \$3.65 MILLION

\$34.5 MILLION in Gifts Surpassed **5209** 

MILLION in Assets 158

Nonprofits Strengthened through Center for Nonprofit Excellence

Expanded Scholarships

\$380,000 Awarded

SOBERANES FIRE FUND

Created

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BACK COVER PHOTOS: (I to r) Watsonville Wetlands Watch, firefighters at Soberanes Fire (Michael Troutman), Positive Discipline Community Resources playgroup Monterey Office

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