Family Philanthropy  Engaging the Next Generation

John and Ann Mahoney are long-time Monterey residents who give generously of both their time and resources. They created a donor advised fund in 2000 at the Community Foundation for Monterey County (CFMC) to simplify their giving. They recently added their four adult children, Mark and Sarah Peterson and Jay and Kevin Mahoney, as donor advisors so each can support their causes of choice. Though two of the children live elsewhere, the Mahoneys stipulated that a portion be granted to Monterey County nonprofits.

This year the Mahoneys allocated a small portion of the grantmaking to their nine grandchildren, ages 5-15. The grandchildren in each family will agree on one organization to support. At a family gathering this fall, they will share how they made their decision. This is a tremendous example of the flexibility of a donor advised fund and how it can engage many generations in the joy of giving. Read their full story at www.cfmco.org/Mahoney.

Many people want to pass on their values by sharing a legacy of giving. Whether through a donor advised fund or private foundation services, the CFMC can help design a customized solution that works best for each family. Below we’ve listed seven benefits to including the next generation in philanthropy.

1. The family develops deeper ties through giving and philanthropy. It provides a way to connect and keep the family together since they are gathering around a shared purpose.

2. When we invite the next generation to the table everyone has an opportunity to learn, personally and professionally. Young people often report that they gain valuable life and professional skills through philanthropic participation.

3. The family learns more about critical issues that impact local and global communities. Millennials can help connect their family’s place-based giving with global issues.

4. We learn to work more effectively with individuals of different ages, beliefs, and experiences. Family philanthropy fosters meaningful relationships across generational lines and can offer a variety of perspectives.

5. We gain new and innovative ideas to explore and incorporate. Bringing new eyes and minds to the work can also bring about a mental shift from doing good to doing better.

6. Young people bring us up to speed on new technology, media, and communication. We can be better connected to our partners, stakeholders, and beneficiaries.

7. The next generation becomes advocates for philanthropy and generosity. Engaging in family philanthropy can help the next generation learn the importance of generosity at an early age and help young people articulate their charitable values.

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PRESIDENT’S MESSAGE

Working with Patience and Urgency

One of my pet phrases to describe community foundations is that we work with great patience and great urgency. Hopefully that patience and urgency will produce great impact.

One of the more telling examples is our work with scholarships. For many in the community foundation field, scholarships have long been a lower priority than other types of funds. They are hard to administer, what with chasing down students to turn in required information, getting proof of enrollment, making sure GPAs are being met (for the scholarships that have those requirements), and following IRS guidelines. What? IRS guidelines? Scholarships may be the most regulated form of philanthropy. Even folks with no malicious intent may think it’s a good idea to establish a scholarship fund for a grandchild. Sorry, but the IRS doesn’t allow direct benefit to known individuals. Committees need to be formed. Donors can be involved but at arm’s length. And there needs to be a large enough group of potential awardees that it doesn’t appear gifts are being directed to specific individuals. All this requires patience.

We’ve always administered scholarships, but perhaps without the same enthusiasm as our other funds. Then a few things happened. A news report stated that college debt surpassed credit cards as the number two type of debt, behind only mortgages (college debt is also immune to bankruptcy). The cost of college was going up faster than scholarships were increasing. And local surveys showed that Monterey County high schoolers aspired to college and professional life, but hadn’t taken the required core courses, nor knew how to access financial aid. The majority of these students would be first-generation college goers. The urgency was clear.

In 2014, the CFMC received an invitation to partner with the College Futures Foundation, a Bay-area private foundation. We’re one of six participating California community foundations in this partnership. We were required to develop a robust scholarship plan and College Futures would provide training and financial resources, including funding for a program person who would work directly with high school students and families.

In 2017 we introduced College Futures Monterey County. Through our partnership with the College Futures Foundation, and a tremendous increase in support from local donors, total scholarships grew from $300,000 in 2015 to $800,000 in 2017. As I read through the list of 2017 scholarship recipients, I was thrilled to see the names, amounts and the outstanding colleges and universities they’re attending.

Patience and urgency equaled impact.

Women’s Fund Creates Opportunity

$100,000 raised for scholarships

A scholarship isn’t just money to Francisca “Frieda” Rios – it’s opportunity. It’s being able to buy a computer to do homework and research from home. It’s knowing that making homework a priority when she finishes her shift at a local pizza shop is a must, because people she doesn’t know have invested in her and have faith in her abilities. It’s making it possible for her to be the first in her family to attend college.

“The scholarship not only provided much-needed financial assistance, it also was a vote of confidence in me and my dreams,” Frieda told the 500 people who gathered at the 2017 Women’s Fund luncheon to support Girls’ Health in Girls’ Hands scholarships.

“I’m very grateful,” said Frieda, who attends California State University Monterey Bay, “Without your support and encouragement, I would not be where I am now.”

Frieda was one of 17 scholarship recipients in 2016 – a number that has doubled to 34 this year. Attendees, inspired by Frieda and keynote speaker, philanthropist Tracy Gary, raised a record $100,000 for the GHGH scholarship program. Learn more at www.cfmco.org/WomensFund.
Paying it Forward
Raymond Costa

Raymond Costa was just nine years old when an act of kindness embedded a feeling he’s never forgotten.

“We had just lost my father—he died and Christmas was coming up. I’ll never forget seeing two station wagons full of toys collected in a toy drive just for my family,” said Costa. “It was totally unexpected—that memory is what makes giving so personal.”

For Costa then, it was toys. Now, for his 700 employees, it’s money for college. Costa is a successful McDonald’s franchisee with ten restaurants he owns and operates in Salinas and the Salinas Valley. Last year he approached the CFMC about setting up a college scholarship program for employees. Working with the CFMC and his attorney, Costa established the Raymond H. Costa Family Scholarship Fund.

“The people who work for us, they hold so much promise,” said Costa, ticking off the skills McDonald’s employees have—customer relations, multi-tasking under pressure and quick decision making that give them strong skill sets for life. “We are about changing people’s lives by giving them an opportunity. If I can help with tuition so employees can further their goals, then that’s what we need to do.”

Sitting in his new office in Salinas, flanked by his team of Human Resources Director, John Duarte, and Director of Operations, Lilia Garcia, Costa got an update on his scholarship’s activity. A look of quiet pride followed when he learned that 14 college-bound employees shared in the $52,500 his scholarship granted. His scholarship fund is helping students attend schools like UC Davis, Hartnell College, UC Berkeley, California State University, Monterey Bay, UC Merced and Fresno State.

On working with the CFMC, Costa noted, “The CFMC is the best group to work with, with a great reputation. I wanted to work with the best, and the CFMC is the best.”

The CFMC holds more than 45 scholarship funds. For more information about establishing a scholarship fund, contact Christine Dawson at 831.375.9712 x126 or visit www.cfmco.org/scholarships.

PHILANTHROPY Engaging the Next Generation, continued

These are just some of the reasons to involve the family in giving. You can accomplish this through a donor advised fund or through an existing foundation. The National Center for Family Philanthropy 2015 Trends Study showed that about 30% of family foundations use donor-advised funds at community foundations or give directly to community foundations. To learn more about engaging your family in your giving or private foundation services, or to receive a copy of the full article, please contact Dan Baldwin or Christine Dawson at 831.375.9712.

Excerpted and adapted from Opportunity of a Lifetime 2.0: Multigenerational Family Philanthropy, by Kylie Musolf and Danielle LaJoie, published by National Center for Family Philanthropy

New Funds Created*

The CFMC manages more than 450 funds established by individuals, families, businesses and nonprofit organizations. Learn more at www.cfmco.org/waystogive.

Agency Endowment
All Saints’ Day School Endowment Fund
Ventana Wilderness Alliance Fund
Big Sur Fiddle Camp Scholarship Fund
Orchestra in the Schools

Agency Stewardship Fund
Meals on Wheels of the Salinas Valley Stewardship Fund
Pacific Grove Public Library Fund for the Future
Sarah Spencer Seed Money Fund for the Center for Photographic Art
Friends of Sunset Foundation Stewardship Fund
United Way Monterey County Stewardship Fund II

Company Fund
Mission Ranches Fund

Designated Fund
Monterey County Development Professionals Fund
Big Sur Relief Fund

Donor Advised Funds
Bareuther Family Foundation
Fuhs Family Foundation Fund
Tom Grainger Memorial Fund
F.B. and B.H. Keith Fund
Marcus Family Fund
Marcus Family Fund (2)
Cambrel B. Marshall Fund
James I. and Barbara S. Miller Charitable Fund
Tim and Cindy Minor Charitable Giving Fund
William and Patricia Monahan Fund
Neidel Family Fund
Shelley Family Fund
Andy and Steffanie Smith Fund
Ben and Mary Ann Whitten Fund
Wold Family Foundation

Field of Interest
Siembra Latinos Fund

General Endowment Funds
Jean P. Fitton Fund

Scholarships
Drezner Family Scholarship Fund
Joel and Dena Gambord Nursing Scholarship
Jess Harrison Family Scholarship Fund
Elke Junger “Sharing the Future” Scholarship Fund
George V. Kriste Scholarship Fund
Rotary Club of Monterey Martin/Hurd Scholarship Fund

*Since January 2017
Northern Monterey County Foundation Awards Grants

The Northern Monterey County Foundation (NMCF) has awarded its first round of grants. The NMCF, established as an affiliate fund of the Community Foundation for Monterey County in 2016, is guided by an advisory board of North County residents who have a deep understanding of community needs. Grants totaling $24,000 were made to ten nonprofit organizations serving Northern Monterey County residents. The 2017 grantees are:

- **Big Sur Land Trust** to provide transformative outdoor experiences for youth
- **Castroville Coalition** for a homeless advocacy campaign of the Castroville Teen Leadership Council
- **Central Coast YMCA** for Pajaro Park programs to build community and promote health and wellness
- **Foundation for Monterey County Free Libraries** to provide adult literacy programs in Pajaro, Aromas, Prunedale and Castroville
- **Girls Inc. of the Central Coast** for leadership training for young women
- **Habitat for Humanity Monterey Bay** to support the Home Repair Program for low-income homeowners in Pajaro
- **Jacob’s Heart Children’s Cancer Support Services** to provide support for families of children with cancer
- **Legal Services for Seniors** for no-cost legal representation
- **Partnership for Children** to help increase access to medical care and support for children with serious illnesses
- **Prunedale Senior Center** to improve the quality of life for area seniors

For more information or to contribute, visit www.cfmco.org/NMCF.

CENTER FOR NONPROFIT EXCELLENCE

9 Small Nonprofits Take “Next Steps”

In 2016, the Community Foundation and its Center for Nonprofit Excellence (CNE) took a bold step to serve an unmet need in the nonprofit community: addressing the unique challenges of the smallest nonprofit organizations.

Half of the nonprofits in the county are very small, with budgets under $100,000. They typically have only one or two employees, and many are staffed by all volunteers. They are focused on delivering services and have a strong commitment to their mission and communities, but often struggle with developing management systems and building the leadership teams that would help their sustainability and impact.

By developing the Next Steps for Small Nonprofits (“Next Steps”) program, the CFMC is providing capacity building support to nine small nonprofits. The grantees were awarded three years of operating support, and recently completed their first year of organizational strengthening activities. The participants have demonstrated a focused commitment to developing stronger infrastructures. While each organization’s activities are different, many have started recruiting more board members, clarifying staff roles and laying the groundwork for a more stable, diversified funding base.

“Every time I attend a workshop, I depart completely inspired. It is so helpful to me to know that I have a network of peers each experiencing the same challenges,” said Lori Tuttle, of Hope, Horses & Kids.

**Next Steps Grantees:** Child Development and Behavior Consortium • Gathering for Women • Hope, Horses & Kids • Monterey Bay Fisheries Trust • Monterey County Pops! • Monterey Peace and Justice Center • Multiple Sclerosis Quality of Life Project • Orchestra in the Schools • The Parenting Connection of Monterey County

Nonprofits: Immigration & Deportation

Nonprofit organizations came together at a recent CNE workshop to identify the impacts immigration issues have had on their organizations. A six-person panel with voices from higher education, legal counsel, community-focused nonprofits, and large national organizations shared their experiences.

Break out groups grappled with difficult issues they encounter when working with affected communities. The rich discussion led to many useful suggestions for nonprofits that serve immigrant communities in today’s climate.

The CNE compiled suggestions for nonprofits, including: Your Nonprofit as a Safe Place, Mental Health Issues for Providers, Adjusting Program Strategies, and Nonprofits and ICE. Visit www.cfmco.org/immigration to read more or download the resources.
The CFMC is pleased to announce the creation of the Siembra Latinos Fund (SLF). Its mission is “To inspire philanthropy and cultivate strong and vibrant Latino communities in Monterey County.” Its vision is “Healthy, Safe and Engaged Latino Communities.” “Siembra” means “to sow” and the fund seeks to grow opportunity for local residents through charitable giving to worthwhile programs. The Siembra Latinos Fund is one of ten members of the National Latino Funds Alliance. Latinos are among the largest and fastest growing ethnic group in the United States. In California, Latinos make up 38.9% of the state’s population; 58.3% in Monterey County (Census 2016). The idea for launching a Latino philanthropy initiative came from Aurelio Salazar, Jr., Program Officer and Latino Philanthropic Services, in a conversation with President/CEO Dan Baldwin.

After inviting Latino community leaders together to gauge interest, share nationwide research and shape such an effort, the Siembra Latinos Fund was born. The founding advisory board members are: Blanca E. Zarazua, Esq. (Chair), Chris Barrera, Ida López-Chan, Erica Padilla-Chávez, Anna Marie Ponce, Frank Ramírez, Daniel Rodríguez and Raúl Rodríguez. They will raise funds and set grantmaking priorities including education, health, safety, community development, the arts and human services. The goal is to make grants now while building an endowment for the future.

The Siembra Latinos Fund is a field of interest fund of the Community Foundation for Monterey County. To learn more, get involved, or support the fund, visit www.cfmco.org/SLF.

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**CFMC Welcomes New Board Members**

**Nolan M. Kennedy**, of Monterey, is an attorney and founding partner of Kennedy, Archer & Giffen. He has been practicing law on the Monterey Peninsula for more than 44 years and specializes in the areas of business, nonprofit, real estate and healthcare law. In 2015, he was honored by the Monterey County Bar Association with the Gibson Award, given to recognize legal achievement and distinguished community service. He’s served on the boards of the Monterey Peninsula College Foundation, United Way Monterey County, Carmel Bach Festival, Monterey Peninsula Chamber of Commerce, and Volunteers in Action. Kennedy is a graduate of Baylor University in Texas and the University of California, Hastings College of the Law. “I am proud to be part of an organization which does such great work in inspiring giving and building our community,” said Kennedy.

**Fred Meurer**, of Salinas, is a retired Army Colonel and former Monterey City Manager. He retired from the City of Monterey in 2013 after 27 years, including 22 as City Manager. Meurer worked to diversify the city’s economy and is credited with establishing working relationships between business districts, residential districts and the city. He oversaw the redevelopment of the city’s residential neighborhoods and business districts, neighborhood policing, waterfront acquisition, the Main Street Program, tourism development, historic preservation programs and development of the education and research economic clusters. He is principal of Meurer Municipal Consulting, LLC. Meurer is a 1966 West Point graduate and has graduate degrees from Stanford University in Water Resources Planning and Civil Engineering. “I’ve always been impressed with the Foundation’s ability to mobilize what is good in our community to address local needs. I hope to contribute to that effort,” he said.

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**Siembra Latinos Fund**

**OF THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY**

We are proud to be on the forefront of Latino philanthropy, and to help sow the seeds for a strong and vibrant Latino community in Monterey County.

—Blanca E. Zarazua, Esq. 2017 SLF Board Chair
Community Impact grants make a meaningful difference for many people and communities throughout Monterey County. For more examples of recent grants, please visit [www.cfmco.org/grantsandsupport](http://www.cfmco.org/grantsandsupport).

**Parent Institute for Quality Education**

**$12,000 for Parent Engagement in Education to help prepare students for success in college (Children & Youth)**

A Forbes Magazine article, ranking the city of Salinas as one of the least educated cities in the country, has one organization taking on the challenge of empowering families through education. Parent Institute for Quality Education (PIQE) is using a $12,000 CFMC Community Impact grant to teach parents and caregivers how to advocate for their children’s educational needs through a series of free workshops. “In addition to being the first teachers, they are the vehicle for student success,” said Janine Ramirez, PIQE Executive Director. “Studies show that parents that are informed and involved have children who are more likely to graduate high school and enroll in college.” PIQE provides its program to 60 low-income parents, reaching about 180 under-represented youth. The goal is to connect parents to proven strategies that can be easily implemented at home and school, that help them develop an effective learning environment that “Creates a College Going Culture.”

**Community Human Services**

**$30,000 for substance abuse and mental health services at Chinatown Health Services Center (Health & Human Services)**

A newly opened Chinatown Health Services Center (CHSC) in Salinas is providing comprehensive help to those most in need, from drug addiction counseling to mental health support and services for the homeless. A $30,000 grant to Community Human Services will provide outpatient drug treatment and mental health counseling at CHSC.

“Our initial plan is to provide these services 16 hours a week,” said Robin McCrae, Community Human Services Chief Executive Officer. “Providing these services on-site removes one of the huge barriers homeless populations face, namely lack of transportation to access services. Another often overlooked issue is lack of familiarity and trust. We expect the Chinatown population will be more willing to engage in services when they know we are connected with Dorothy’s Place and the CHSC.”

McCrae said a 2017 Monterey County Homeless census report underscores the immediate need for these services. It found 28 percent of those surveyed had emotional or mental health conditions and 34 percent reported abusing drugs or alcohol.
STORIES OF IMPACT

Sunset Cultural Center
$30,000 for Arts-in-Education Program (Arts & Culture)

A shift in California’s public education curriculum has put a focus on science, math and technology, leaving teachers with less flexibility for art instruction. Sunset Cultural Center (SCC) is encouraging the advancement of arts education in Monterey County through three targeted programs.

A $30,000 grant to SCC is funding a three-component arts education program. Classroom Connections, launched in 2008, has provided 10,000 Monterey County students with opportunities to interact with internationally touring artists. The other two programs are the Kennedy Center’s Partners in Education Program and Turnaround Arts.

“Their remains a large amount of unmet need for arts education, especially in the lowest performing schools and districts,” said Barbara Davison, SCC Development Manager. “Sunset Center has been able to broaden the scope of its arts education outreach from individual student interaction to school and district reform,” she said.

Turnaround Arts: California has partnered with SCC to implement arts education programs in high-need elementary and middle schools including two local schools: Mary Chapa Academy in Greenfield and Martin Luther King Jr. Elementary School in Seaside. SCC is also partnering with the North Monterey County Unified School District as participants in the Partners in Education program of the John F. Kennedy Center for the Performing Arts.

“SCC was selected because of their demonstrated commitment to the improvement of education in and through the arts. The partnership team will participate in collaborative efforts to make the arts integral to education district-wide,” Davison said.

Elkhorn Slough Foundation
$20,000 for Sand Hill Farm Restoration Project (Environment)

The migratory birds that carpet the gentle waters and wetlands of the Elkhorn Slough in Moss Landing are the residents of an ecologically sensitive area. Weeds, trash, and unchecked water run off threaten the habitat of dozens of species that call the area home.

The Elkhorn Slough Foundation is working with volunteers to repair and rehabilitate the 4,000-acre watershed. A $20,000 grant is being used to restore “Sand Hill Farm” – 107 acres of former agricultural land adjacent to the Elkhorn Slough Reserve that drains into the slough.

“For nearly four decades its extremely steep slopes were used to grow strawberries, and the farm was left with deep furrows and agricultural debris,” said Mark Silberstein, Executive Director, who estimates that it will take seven to ten years to restore the hillside to native vegetation.

Critical work is already underway. The full scope of the restoration includes: stabilizing eroded slopes, re-contouring the land to remove and fill gullies, cover-cropping to protect against erosion, rebuilding healthy soil, restoring native vegetation and removing trash piles, debris and weeds.

Neighborhood Groups Inspire
$50,000 Awarded to 15 Groups

The fifteen groups receiving the 2017 Neighborhood Grant Program (NGP) grants are doing inspiring work. At the 20th Annual Awards Ceremony on July 26, groups from Salinas, Seaside and North and South County shared what the support meant to their organizations.

“This grant has increased Palenke Arts’ capacity as an emerging arts organization by allowing us to buy much-needed sound, recording and lighting equipment thanks to a quick, streamlined granting process.”

— Juan L. Sánchez, Palenke Arts Program Coordinator/NGP Grantee

$50,000 total was awarded to support playground revitalization, music and dance instruction, youth leadership training and mentoring, programs for families of color, parents of children with special needs, crisis intervention for homeless women and youth empowerment.

The purpose of the Neighborhood Grants Program is to support local residents who come together to improve their communities. Since the program’s inception in 1997, more than $975,000 has been awarded to support groups whose volunteers work to improve the safety, well-being, and quality of life in their neighborhoods.

“We are committed to supporting resident-led groups that are invested in giving back to the community.”

— Aurelio Salazar Jr., CFMC Program Officer and Latino Philanthropic Services

For a full list of grantees or more information, visit www.cfmco.org/NGP.
MC Gives! is a partnership between the Monterey County Weekly, the CFMC and the Monterey Peninsula Foundation.

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