

Private & Family Foundation Services

A Customized Approach



Dena and Joel Gambord created the Joel and Dena Gambord Charitable Foundation at the CFMC.

We Handle the Administration While You Fulfill Your Philanthropic Vision

The Community Foundation for Monterey County (CFMC) offers a variety of philanthropic services to support your local, national or international grantmaking. Reduce your administrative burdens and maximize charitable giving with the assurance that your foundation's philanthropic goals will be achieved in a personalized, cost-effective manner. Private Foundation Services at the CFMC are customized to meet your individual needs.

Customized Grantmaking & Administrative Services include:

- Vision and strategy development
- Succession planning
- Grantmaking support
- Creating proposal guidelines
- Grant research, due diligence and proposal screening
- Distribution and tracking of personalized grant checks
- Marketing and promotion

Generational Transition The CFMC can assist with succession planning, upholding the legacy of your private or family foundation.

Personalization Working with the CFMC is highly personalized. From letterhead and checks to custom web page and online services, your foundation's giving can be branded to your foundation's name or it can be anonymous.

Private & Family Foundation Donor Advised Funds For some foundations, a donor advised fund at the CFMC is a strong option. The CFMC offers many of the same benefits as a private foundation, plus increased flexibility, tax advantages and customized services to support your charitable vision.

Community foundations provide a cost-effective, powerful, and customized approach to fulfilling your foundation's charitable goals.

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Healthy, Safe, Vibrant Communities

"I love the 'can-do' attitude of the Community Foundation."

—Joel & Dena Gambord

The Gambords created the Joel and Dena Gambord Charitable Foundation at the Community Foundation for Monterey County. Staff provided the Gambords with foundation services including assisting with defining giving goals, developing grantmaking procedures, conducting due diligence on potential grantees, creating a custom webpage and meeting with the family to finalize their annual grants.





With the CFMC's Private Foundation Services you receive the level of support that best meets your needs.

Join us
Achieve your charitable goals with customized foundation services.

Click
www.cfmco.org
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Contact



Dan Baldwin
President/CEO
831.375.9712 x115
danb@cfmco.org



Christine Dawson,
Vice President of
Philanthropic Services
831.375.9712 x126
christine@cfmco.org

Visit

MONTEREY
2354 Garden Road
Monterey, CA 93940

SALINAS
945 S. Main St., Suite 207
Salinas, CA 93901

Grant Administration

Grantmaking Consultation

- **Vision and strategy development** Help you create and implement a strategy for your philanthropy that will transform your values into goals and objectives.

Grantmaking Support

- **Application process** Assist with the creation of proposal guidelines, identification of eligible organizations, promotion and distribution of RFPs.
- **Selection support** Review and screen proposals as well as advise on selections and award amounts.
- **Due diligence** Conduct local site visits (out of area site visits may incur extra fees), research past accomplishments, review financials and assess organization leadership.
- **Research** Provide in-depth assessments of community needs as a means to help determine funding priorities.
- **Reporting** Creation of requirements, monitoring compliance and performance, and collecting and reviewing reports.

Administrative Services

Administrative Services

- **Process grants** Ease the burden that comes with administering grant agreements as well as the disbursement and tracking of grant funds (with a minimum of \$500 per grant).

Marketing & Promotion

- **Creation of a web page** for your fund, press-release (optional) and listing in the CFMC newsletter and annual report.

Accounting Services

- **Quarterly fund statements** with online access.

Investment Management

- **CFMC funds are professionally invested** as part of a \$160 million portfolio.

Philanthropic Services for Private & Family Foundations

- \$1,500 flat rate for up to \$50,000 in cumulative annual grantmaking
- 2% fee for total annual grants made above \$50,000

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