GIVING. TOGETHER.
The Community Foundation for Monterey County (CFMC) has always symbolized the idea of “Giving Together.” This certainly held true in our successful 2015. Our assets represent a collection of funds entrusted to the foundation by many people with varied interests. Because our grantmaking reflects these interests, we are, in effect, always Giving Together.

Events in 2015 brought this concept to life. The arson fire at the Food Bank for Monterey County in March prompted a $50,000 grant from our unrestricted funds and rallied 35 donor advisors to grant an additional $270,000. In November, the Tassajara Fire burned hundreds of acres and several homes. We immediately opened the Tassajara Fire Fund. One hundred four people donated, and we were able to make grants directly to displaced individuals. Monterey County Gives!, the year-end campaign conducted in conjunction with the Monterey County Weekly, and our newest partner, the Monterey Peninsula Foundation, more than doubled the then-record 2014 totals for number of donors and dollars donated, resulting in $3.12 million in grants to the participating nonprofit organizations.

One of our board’s most important functions is the development and oversight of its strategic plan. In 2015 the board reviewed our 2010 strategic plan, and dove into developing a new one. The three pillars of the 2010 plan – Community Impact through wise and effective grantmaking; Philanthropic Leadership; and Organizational Excellence – remain in our 2015 plan, but have been modernized to better reflect our current goals. And a fourth pillar was added: Community Leadership. This fourth pillar reflects the CFMC’s growing engagement in issues and initiatives beyond grantmaking.

While it is important that we not lose sight of our goal to continually grow our total assets, we increasingly recognize our desire to deploy assets for the benefit of our communities and the organizations that serve them. In 2015, we received gifts in excess of $18.6 million, which represents one of our most productive years. But we’re just as excited about the $10 million we granted, and the ever-increasing amount being granted by our donor advisors. This year our donor advisors granted a record $4.7 million, with $1.2 million being co-invested in the Food Bank project, Monterey County Gives!, and our Community Impact grant program.

We hope you find this report to be informative. It reflects our county’s great philanthropic spirit, as well as the CFMC’s commitment to stewarding assets, assisting our donors in reaching their philanthropic goals, and allowing us to make a difference in the lives of thousands of Monterey County residents. In short, we appreciate the opportunity to leverage the power of Giving Together.

Rick Kennifer
2015 Board Chair

Daniel R. Baldwin
President/CEO

“This report... reflects our county’s great philanthropic spirit.”
 – Dan Baldwin
GIVING TOGETHER

Giving is inspiring. When we hear about generous acts of philanthropy, we want to get involved. Gifts in 2015 ranged from $10 donations from children for Monterey County Gives! and contributions from donor advisors to a large bequest. These acts combined to create an enormous impact in 2015 – $9.8 million granted to 503 organizations and individuals and $137 million since our founding in 1981.

Numbers don’t always reflect the difference made in the lives of recipients; the girl empowered through Girls’ Health in Girls’ Hands, the boy who learned the joy of making music, the woman who is safe from harm, the at-risk youth who seeks a better future, and the bright young person who can now attend college.

The CFMC has thousands of donors, hundreds of nonprofits and dozens of professional advisor partners who help create a vision of “Healthy, Safe, Vibrant Communities.” All these elements work together to make change possible.

The mission of the Community Foundation for Monterey County is to inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County. We are proud to be your partner in philanthropy.

“If everyone is moving forward together then success takes care of itself.” - Henry Ford
CO-INVESTMENT
Partnering with Donor Advisors

In 2015 our donor advised funds continued to grant in record numbers – $4.7 million, up 9.3% from 2014, comprising nearly half the total grants made by the CFMC. About one quarter of this total was co-investment from donor advisors who partnered with the CFMC to provide support to initiatives, projects and programs benefiting Monterey County. Contributions included $432,000 to the Monterey County Gives! campaign (see p. 4) and the inspiring response to the Food Bank Fire (below).

DONOR ADVISED GRANTS

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DONOR ADVISORS
Respond to Food Bank Fire

The nimble response of the CFMC’s donor advisors and fellow funders helped the Food Bank for Monterey County recover from the arson-caused fire in March. The CFMC board immediately approved a $50,000 grant to help sustain critical services.

President/CEO Dan Baldwin reached out to donor advisors and fellow funders. Within days, the CFMC, Harden Foundation, Monterey Peninsula Foundation, David and Lucile Packard Foundation, Nancy Buck Ransom Foundation, Pebble Beach Company Foundation, First 5 Monterey County, and United Way Monterey County responded, contributing $542,500.

Nearly half, $270,000, was provided by CFMC fund holders, who rose to the occasion to make sure families in need did not go hungry. This unfortunate event helped raise awareness of food insecurity in our county, where 1 in 5 people utilize the Food Bank’s services. The outpouring of support demonstrates the power of local philanthropy.

“‘We’re excited to help our favorite nonprofits and learn about new opportunities for giving.’
- Kevin Cartwright and Steve Eimer

Community Impact

Community Impact (CI) is the CFMC’s largest competitive grantmaking program. Twice a year we share CI grant proposals with donor advisors and offer them the opportunity to contribute to these important projects. In 2015 twelve donor advised funds co-invested nearly $470,000.

“We appreciate receiving updates on potential grantees. We’ve learned a lot, which has allowed us to invest in organizations we hadn’t known about before,” said Kevin Cartwright and Steve Eimer, donor advised fund holders.

“The Community Foundation does a huge service to both donors and nonprofits and continues to get better and better. The flexibility is game changing.”
MONTEREY COUNTY GAVE! $3.17 Million

Monterey County Gives! epitomizes the spirit of giving together. In 49 days, a record $3.17 million was donated by over 4,000 individuals, families and businesses. They supported the “Big Ideas” of 141 nonprofits in Arts & Culture, Community & Social Service, Education & Youth, Environment & Sustainability and Health, Wellness & Food.

This annual campaign encourages donors of all levels to support local nonprofits. The campaign easily surpassed the $2 million goal and more than doubled 2014 giving. The record amount of donors and money raised in 2015 demonstrates the generosity of people in our community.

The campaign’s success was spurred on by $348,000 in matching funds, supported in large part by the addition of Monterey Peninsula Foundation as a campaign partner. “Monterey County Gives! is a great example of local philanthropy. We’re thrilled to partner with other funders to build local support for nonprofits, and about the record success this year,” said Steve John, CEO of the Monterey Peninsula Foundation. Along with the overall match, many participating nonprofits raised Challenge Grants from key supporters, enabling the campaign to launch on November 12 with more than $700,000 already contributed.

The CFMC provided $2,500 Ingenuity Awards to Loaves, Fishes & Computers (LFC), whose big idea was to distribute 99 dual-language computers to low-income families, and Gathering for Women - Monterey, which is raising funds for a food pantry and day center for homeless and at-risk women. The International School of Monterey received an award for most donors under 35, and Peace of Mind Dog Rescue for the most overall donors.

“LFC is honored and proud to receive the ingenuity award that will allow us to hire an employee to produce dual language computers for our neighbors in need,” said Loaves, Fishes and Computers Executive Director Christian Mendelsohn.

The 2015 response surpassed all expectations. We look forward to building on the momentum.

GRANTMAKING
$9.8 Million Awarded

Philanthropy fuels grantmaking, grantmaking creates impact, and impact inspires philanthropy.

In 2015, the CFMC, together with its donor advisors, distributed nearly $9.8 million in 1,076 grants to 503 agencies in Monterey County and beyond. The CFMC also strengthens the nonprofit sector beyond grantmaking. The work of the Center for Nonprofit Excellence with nonprofit staff, board and volunteers expands nonprofit capacity and sustainability.

Community Impact grants
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.

Our commitment to continuous improvement includes monitoring our grantmaking programs and identifying ways to streamline our processes. As a result, we increased the use of online technology and simplified our application guidelines.

Partnering with Funders
The CFMC collaborates with local funding partners to support and enhance programs for increased impact. Grants from the Peggy and Jack Baskin Foundation, College Futures Foundation, Claire Gianinni Fund, Monterey Peninsula Foundation, David and Lucile Packard Foundation and Tides Foundation supported CFMC programs and initiatives.

“Giving Together equals increased investment in healthy, safe, vibrant communities.”
— Laurel Lee-Alexander, Vice President of Grants and Programs

$9.8 MILLION Awarded

PROGRAM AREA

Human Services 28%
Education 15%
Arts & Culture 18%
Health 13%
Public Benefit 9%
Environment 7%
Animal Welfare 4%
Religion-related 3%
Historic Preservation 2%
International 1%

GRANTS BY PROGRAM AREA

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<tr>
<td>International</td>
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Total: $9,778,712
The CFMC seeks to align its philanthropic investments with the county’s greatest needs. Grant committees, made up of CFMC board members and community representatives from across the county, review proposals and select projects with the greatest potential to make a meaningful difference. View all Community Impact grants on our website.

www.cfmco.org/recentgrants

Carmel Bach Festival - Growing Music Appreciation
$15,000 to Expand Family Concert Series to Seaside and Salinas and Adding Spanish Narration

Nia De Leon is five years old and can already identify instruments she hears in classical music. “She has developed a new awareness – her exposure and appreciation are growing,” said Nia’s mother Nargess. The De Leon family gained this appreciation for classical music thanks to the Carmel Bach Festival’s family concert series. “Our family looks forward to going,” said Nargess, whose son Jonah, 7, is a budding violinist who is inspired to learn and play the works of Bach.

Families like the De Leons are among the audiences that the Festival wants to reach to spark the love of classical music. The CFMC grant will expand the family concert series to include Seaside and Salinas, and add Spanish narration. To make classical music more accessible, concert fees will be reduced, with complimentary tickets provided to youth partners. Musicians will also connect with local high school students to prepare a piece to be performed at the concert.

Peacock Acres - Foster Youth Skills Development
$10,000 for The Learning Center, a Learning Space for Foster Youth

Showing a parent a good grade can be a self-esteem booster for any child. Yet for foster children the experience may never happen. “They don’t have their parents to go home to everyday, to say ‘Look What I Did,’” said Ernie Howard, Executive Director of Peacock Acres, a Salinas-based nonprofit that provides services, housing and support for Monterey County foster youth and those on probation. “Kids in foster care don’t always have that adult telling them ‘Good job’ or ‘You can do it’ to make them feel valued.” A $10,000 grant for the Peacock Acres Learning Center will help build self-esteem around academics by connecting foster youth with tutoring services, mentorship and employment training. The center is open before and after school and serves as a home school education site.

“Feeling good about an accomplishment is meaningful to everyone – having confidence in academics means high school graduation, college, or bigger thinking,” said Howard. Some 50 volunteers serve as tutors and mentors and staff members work with schools to ensure completion of required credits and assignments.
Ventana Wilderness Alliance - Outdoor Trips for Underserved Youth
$10,000 for Youth Wilderness Exposure

Nature can have a transformative effect. The Ventana Wilderness Alliance (VWA) organizes and leads local backpacking trips for at-risk youth to give them exposure to life-changing experiences. Working together to climb a mountain or forming bonds while camping are powerful experiences that lead to new perspectives. “By immersing themselves in the natural environment, kids learn skills like teamwork, trust, self-reliance – skills that translate back to their community,” said Richard Popchak, VWA development director.

The grant supports backpacking trips and day trips to Ventana and Silver Peak Wilderness Areas at no charge to underserved Monterey County youth. VWA works with youth ranging from elementary to high school, including teenagers from Rancho Cielo and similar programs. “Most of our participants don’t have the means to know how to explore the lands on their own,” Popchak said. “We hope that they will be inspired to explore and develop a life-long relationship with the natural world.”

The VWA’s mission is to protect, preserve and restore the wilderness qualities and biodiversity of public lands within the Santa Lucia Mountains and Big Sur coast.

Veterans Transition Center - Job Skills Development for Veterans
$50,000 for Job Development Center

The Veterans Transition Center (VTC)’s Job Development Center in Marina is helping veterans find employment. It is a key component of VTC’s services to help veterans get the skills they need to be economically secure and resilient. The grant will support expansion of the Job Development Center at Martinez Hall on the former Fort Ord – a historic place where for decades, Army soldiers were trained before its closing in 1994.

Veteran Preparation, Reintegration, and Employment Program (VET-PREP) was awarded funding to support military veterans living in Monterey County. In early 2016 the VTC launched “Operation: Job Search 2016” to instruct veterans on employment skills such as resume building, interviewing, application tips, and to provide education opportunities. The program features guest speakers who offer advice from employment agencies and local businesses. It will enhance the employment skills of homeless, disabled and/or low income Veterans.

“This generous grant will help homeless veterans become self-sufficient by making them ‘employment-ready’ and competitive in the job marketplace,” said Terry Bare, the VTC’s executive director.

California Department of Parks & Recreation - Historic Preservation
$50,000 for Restoration Plans of Monterey’s Custom House

Monterey’s Custom House was a bustling place – trading ships from as far as South America and England lined the Monterey harbor to unload furs, wood, and other goods. In the 1800’s the Custom House was a vital economic port in the Americas. It became California’s first designated historic landmark, and, politically, marked the site where in 1846 U.S. Commodore John Drake Sloat raised the American flag and declared it part of the United States – taking control from Mexico.

This rich story will come to life with a $50,000 grant to aid in the construction plans for full restoration of the Custom House in Monterey State Historic Park. The funds will enlist the services of an architectural and engineering firm specializing in historic preservation to develop a complete set of plans, drawings, and specifications that can be put out to bid for construction work. CFMC funds will augment state funds to support the project.
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.

The Women’s Fund changes lives by bringing people, resources and ideas together to improve the quality of life for local women and girls. Annual grants support agencies that increase opportunities for women to empower themselves. In 2015 the Women’s Fund Endowment reached $1.5 million and the Women’s Fund Leadership Council was formed to guide the future direction of the fund.

The Women’s Fund invests in two key areas: the future of girls and women’s economic security. More than $1 million has been granted since 2003 to help women and girls realize their potential.

The Future of Girls – Girls’ Health in Girls’ Hands (GHGH)

This girl-led movement for health empowerment is a partnership among girl-serving agencies, their leaders, program staff and the girls themselves. More than 550 girls from 22 sites are participating in health education and leadership training and more than 1,500 girls have been impacted. (See page 9)

Women’s Economic Security – WES

The Women’s Economic Security (WES) initiative was created to help low-income women with children access the education, skills and support they need to secure family-sustaining wages. The CFMC created a two-generational approach based on local data and national models to help break the cycle of poverty. A $225,000 grant was made to the ACTION Council of Monterey County to facilitate a three-year pilot project, titled “Women in Action,” where women help one another achieve their goals.

Women’s Fund Endowment – Join Us!

The Women’s Fund welcomes donations and legacy gifts to meet changing needs. A gift made to the Women’s Fund endowment will benefit women and girls in Monterey County today and in the future.
GHGH is a countywide collaborative founded in 2012 to help girls ages 11-18 in Monterey County gain better access to health information, leadership skills and advocacy training. Hundreds of girls have developed tools to help influence positive changes in their lives and the lives of others.

Advocacy
In 2015, GHGH progressed in its efforts to promote healthy emotional development. The Girls Leadership Network (GLN) presented their findings to several important governing groups including the Monterey County Board of Supervisors and the Monterey County Office of Education (MCOE).

The GLN shared surprising statistics on the status of social and emotional health of teens in our county along with personal stories to highlight the importance of focusing on healthy emotional development. These presentations led to both groups adopting the first youth-written resolutions to show their support for GHGH.

“The school board presentation and resolution drafting showed me that I am capable of great things and I have a voice,” said one GLN Participant.

I learned that I am not alone in my feelings, and I can show others that they are not alone.” - GHGH Participant

Girls Leadership Network
(l to r) Salma Aredondo and Jocelyn Ramos

Bubbles & Bags Silent Auction, held in November at the Inn at Spanish Bay raised $40,000 to support GHGH. More than 300 attended to purchase new, gently loved and vintage bags generously donated by community members. Bubbles & Bags was co-chaired by Judie Profeta and Stephanie Harkness and hosted by the Pebble Beach Company with support from Illusions of Grandeur. Premier sponsors: Comerica Bank, Impower. Platinum Sponsor: Kathy and Don Yost. Gold Sponsor: Mann’s Packing. Bronze Sponsors: Jane Emison, Joanne Nissen.

“I was absolutely moved by this event. It changed my life and opened my eyes.”
- GHGH Participant

GRANTMAKING | GIRLS’ HEALTH IN GIRLS’ HANDS

Girl-led Health Empowerment Summit
In November, more than 130 girls gathered at the Asilomar Conference Grounds to learn more about girl-led health and advocacy efforts to help create opportunities for healthy emotional development for local youth. They attended workshops on reproductive health, healthy relationships, nutrition, physical fitness, stress and depression, self-esteem and body image, healthy sexuality and conflict mediation.

Attendees got to know other girls from nine cities in Monterey County and brainstormed solutions to the challenges around school counseling services. Nancy Kotowski, Monterey County Superintendent of Schools, presented a resolution passed by the MCOE recognizing the work of GHGH and prioritizing social and emotional health in our schools.

“We should be role models for the girls in our community!”
- GHGH Participant

GHGH is a collaborative program of the Monterey County Health Department in partnership with the Boys & Girls Clubs of Monterey County, Girls Inc. of the Central Coast, Monterey County Rape Crisis Center, Planned Parenthood Mar Monte and the YWCA Monterey County. It was created by the Women’s Fund of the Community Foundation for Monterey County.
HELPING NONPROFITS THRIVE
Working and Learning Together

2015 was a year of working and learning together for the Center for Nonprofit Excellence (CNE). The CNE served over 160 agencies through workshops, institutes, consulting, grantmaking and other resources. Many nonprofits took advantage of multiple CNE services, using one to complement another to significantly strengthen their organizations.

“Your support, workshops, online resources, one-on-one meetings and Organizational Development grants are all combining to help us make our goal of long-term organizational sustainability achievable,” said Phillip Geiger of Legal Services for Seniors.

Educating Together – Capacity Builders Network
The Monterey Bay Capacity Builders Network is comprised of more than ten organizations that coordinate to provide professional development support to local nonprofits. In 2015, the network offered a series of events on evaluation, including a multi-session seminar presented by CNE. This helped nonprofits better understand the value of their programs and learn new ways to improve their effectiveness.

Learning Together – Futer Grantees
Ten local nonprofits completed the three-year Futer Essential Social Services Program, which combined grantmaking, training, peer learning and mentoring to strengthen these key organizations and their future stability. Over the course of the program, grantees developed strategic plans, implemented new fundraising strategies, expanded their boards, and completed effective communications with their clients and the public.

“This grant provided a springboard for growth for our organization. We now have a committed Board of Directors, an experienced development team, and a strong community of supporters,” said Margie Mayfield, Executive Director of Coastal Kids Home Care, a Futer grantee.

Developing Resources Together
The Monterey, Santa Cruz, and San Benito County Community Foundations coordinated to develop an online database with information about consultants who provide services to nonprofits in these three counties. Accessible through each foundation’s website, the database holds profiles for over 75 consultants and continues to grow. The CFMC website also provides information about selecting and working effectively with consultants.

www.cfmco.org/CNE
SCHOLARSHIPS
Helping Others Dream Big

Thanks to generous donors like the Bartels, Sarment and Spradling families, an investment in a student’s future can change the trajectory of a life. Dr. James Bartels was described as a cross between a cowboy and James Bond – a fighter pilot, a champion marksman, surgeon and innovator of a technique for repairing cleft lips. Education allowed him to achieve his goals. His family set up The Dr. Roger and Kate Bartels Memorial Scholarship to inspire students to dream big, just as he had.

As a retired public school teacher Harles Sarment understood the value of higher education and left his entire estate, valued at $1 million, for scholarships to Monterey County students. The Harles R. Sarment College Endowment Fund was established by Sarment through his estate in 1990. Thanks to the power of endowment, the fund has granted scholarships totaling nearly $1 million to 270 students.

David and Maryanne Spradling established the Joseph and Betty Spradling Scholarship to provide financial awards to students working their way through school. Each year up to $2,000 is given to three first-year students attending Hartnell College or Monterey Peninsula College.

“I just wanted to give working students a boost.” - David Spradling, scholarship donor

“There is something very meaningful in being a working student at a community college. It shows you have done something, wanted to learn and gone through some effort to get there,” said Spradling, who named the scholarship for his parents. They modeled a strong work ethic which he exemplified as a young boy with a paper route, and later as a successful photographer then lighting entrepreneur.

Receiving a scholarship has meant opportunity for Alexander Baskoro, a Marina High School graduate attending UC Berkeley who is the first in his family to attend college. “Opportunity is right in front of me now. Thanks to these scholarships, they’ve given me a perfect platform to experience and explore my interests and do things that provide tangible support to my community,” said Baskoro, a recipient of both The Dr. Roger and Kate Bartels Memorial and The Harles R. Sarment College Endowment Scholarships.

With the addition of The Howard and Gretchen Leach Scholarship Fund and The Morse Foundation Scholarship Fund in 2015, the CFMC now manages over 30 scholarship funds that help students afford college, and affirm that their community supports their aspirations. Our Philanthropic Services team works with families to design a scholarship program that meets their goals and manages each step from application to award.

Scholarships vary in amount from one time awards of $700 to a four-year scholarship of $60,000, and benefit students from every public high school in the county. The CFMC awarded more than $285,000 in scholarships to 85 students in 2015.

www.cfmco.org/scholarships

“The idea that the community helped me fund my education is making me want to give back to my community.” – Alexander Baskoro, Joseph and Betty Spradling scholarship recipient

“I just wanted to give working students a boost.” - David Spradling, scholarship donor

“The idea that the community helped me fund my education is making me want to give back to my community.” – Alexander Baskoro, Joseph and Betty Spradling scholarship recipient
DISTINGUISHED TRUSTEE
Awarded to Nancy Ausonio

Each year the CFMC honors an individual or couple who has demonstrated exceptional generosity and commitment in supporting local nonprofit agencies. In 2015 the award was presented to Nancy Ausonio for her philanthropic leadership.

Nancy makes a difference by giving both her time and money. She is a founding board member of the Foundation for Monterey County Free Libraries, president of the Friends of the Andy Ausonio Library, as well as past board member of the Salinas Valley Memorial Hospital Foundation, and the CFMC. Her favorite causes include organizations benefiting seniors, youth and health, the CFMC’s Women’s Fund and her local church. The library in Castroville is named after her late husband Andy, thanks to Nancy’s leadership efforts. Nancy created a donor advised fund in 2003 and plans to add to her fund through her estate. “It’s all in place. It will continue after I’m gone. Just knowing you’re helping someone feels good.”

“I always just wanted to help somebody.”
– Nancy Ausonio

CFMC Distinguished Trustee Award Honorees

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
PAYING IT FORWARD
Rick and Tonya Antle

Rick Antle is the CEO of agricultural giant Tanimura & Antle. Tonya is best known for blazing the trail for organic produce as VP of Marketing at Earthbound Farm, and is now a community volunteer. They are CFMC donor advised fund holders and Legacy Society members, and give back in many ways.

What does philanthropy mean to you?
To give of yourself through your time, your talent and/or your treasure. We need volunteers that can contribute the gift of time. We also need volunteers that can share their talents and when community members can give financially that’s wonderful too. Everyone, no matter your age, education and economic status can be a philanthropist. The perfect example is MC Gives!. Everyone can give whatever they can to nonprofits that match their interests.

What causes do you most connect with?
Tonya - The Women’s Fund - the Girls’ Health in Girls’ Hands initiative is truly changing lives, inspiring young ladies to think bigger and go further than they ever imagined. The Women’s Fund also helps older women gain the education and skills they need to lift them up out of poverty. When a woman thrives so does her family and ultimately her community, that’s powerful.

Rick - I am passionate about having more affordable housing accessible for our local workforce. T & A has taken action by creating housing for employees. We hope other employers will be inspired to do the same.

How do you pass your values to your family?
It started with service hours in elementary school. It was a great springboard to speak with the kids about the gift of time. We had them gather and deliver their unused toys to local homeless shelters. We started eliminating holiday gifts and asking them to research and decide where the equivalent amount of money would go as a donation. They still ask us to give to their nonprofit of choice instead of gifts.

What would you say about giving back?
When you come from a modest upbringing and remember the goodness of others it stays with you for the rest of your life. So, when you can start giving back, you are paying it forward.

What would you tell others about leaving a legacy?
When you have been able to give to your favorite nonprofits over your lifetime, wouldn’t it be wonderful to be able to continue to give long after you are gone? It’s reassuring to know that our legacy gift will be secure and our wishes fulfilled properly and professionally. Working with the CFMC has been a true gift.

About the Antles
Tonya has been a CFMC board member since 2010, the Women’s Fund Endowment Chair and Chair of the Women’s Fund Leadership Council. She is a volunteer guest lecturer at Hartnell College and CSUMB, a member of the CSUMB Women’s Leadership Council and Carmel Women’s Club. Rick serves on the Cal Poly Ag Advisory Council and is an active member of many produce industry associations.
WHAT OUR DONORS ARE SAYING

TRUST
We feel strongly that these funds are indeed helpful, if not vital, to so many diverse needs of our regional community. We trust our gifts will be allocated effectively and put to beneficial use by each recipient.”
– CFMC donors Joe and Sheila Mark

FLEXIBILITY
We can give both locally and outside the area and involve our family. It’s never too early to begin building healthier communities.”
– CFMC donor advisors Adriana and Bill Hayward

SIMPlicity
When we were investigating how to extend our estate plans into the future we looked into establishing a family foundation. A donor advised fund in which our daughters are co-advisors provides an ideal solution without any significant administrative burden, simplifying cash flow, planning for ongoing giving efforts, and additional tax benefits through being able to contribute highly appreciated assets.”
– CFMC donor advisors Bill and Emmy Reese

LOCAL KNOWLEDGE
As relative newcomers to Monterey County, the CFMC’s knowledge of local nonprofits has been really valuable. We like the motto, ‘Here for Good’.”
– CFMC donor advisors Jackie and Peter Henning

SUPPORT
I like the high level of support I receive. I don’t have the administrative burden of a private foundation and I’m confident my wishes will be carried out in the future.”
– CFMC donor advisor Bob Nunes
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"We make a living by what we get. We make a life by what we give."
-Winston S. Churchill
Neighborhood Grants: Small Grants, Big Impact

The numbers of African Americans with HIV/AIDS in Monterey County consistently surpasses every other ethnic group, says Akin Miller, President of the African American HIV/AIDS Wellness Program. Moved to stop the loss of friends and loved ones, his group operates an all-volunteer, grassroots campaign to educate. They were awarded $2,400 for outreach materials for work in partnership with the Monterey County Health Department in informing the African-American and Latino communities about HIV-AIDS prevention at health fairs, festivals, religious events, and social and civic groups.

The Neighborhood Grants Program (NGP) links donors who had the vision to provide unrestricted charitable resources with community volunteers they may never meet. By giving to the endowment, which funds the NGP and other discretionary grants, donors trust the CFMC to respond to changing community needs. These smaller grants have a tremendous impact when combined with the energy of committed volunteers. In 2015 NGP granted $52,000 to 17 groups, bringing the total to more than $900,000 since 1997.

We get out there and just talk to people about what they can do – we talk to everyone.” — Akin Miller

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Monterey County Gives! check presentation ceremony

“"The great use of life is to spend it
for something that outlasts it.”
- William James

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The Legacy Society recognizes those who thoughtfully planned a gift through their estate, or create an endowed fund. Members are invited to an annual appreciation luncheon to hear about the impact legacy giving creates. If you have included the CFMC in your estate, or would like to make a gift (through a bequest, trust, life insurance, charitable gift annuity or other means) please contact Christine Dawson or Dan Baldwin at 831.375.9712 so we may recognize your generosity.

The Community Foundation means trust. It’s this wonderful joy of feeling part of the future even after you’ll be gone... The most joy comes from giving to what’s closest to your heart.”

– Bertie Elliott, CFMC donor advisor, Legacy Society member, former board chair (left)
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The CFMC holds nearly 400 funds created by individuals, families, nonprofits and businesses. Funds can be established to benefit individual organizations, specific types of nonprofits (such as arts, youth or the environment) donor advised, scholarships or unrestricted to respond to changing community needs. The CFMC is a steward of the charitable assets entrusted to us and each donor’s philanthropic vision. Please call us at 831.375.9712 to learn more.

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- Museum Foundation of Pacific Grove Stewardship Fund
- Pacific Grove Public Library Foundation Stewardship Fund
- Peace of Mind Dog Rescue Stewardship Fund
- Rancho Cielo Youth Stewardship Fund
- Monterey County Rape Crisis Center Stewardship Fund
- Learning Opportunities Endowment Fund for Scottish Fiddlers of California*
- Shelter Outreach Plus Stewardship Fund
- Sun Street Centers Anne C. Leach Scholarship Fund
- Sun Street Centers Stewardship Fund
- Temple Beth El Stewardship Fund
- United Way Monterey County Stewardship Fund
- Voices for Children Stewardship Fund
- Central Coast Young Men’s Christian Association Stewardship Fund
- YWCA Monterey County Stewardship Fund

**Corporate Funds**
Businesses simplify their giving and receive tax advantages and customized support to maximize their community philanthropy.
- The Carmel Realty Foundation
- Monterey County Weekly
- Nepenthe/Phoenix Corporation Fund
- Jane P. McKay Endowment Fund
- John H. Marble Endowment Fund
- Sandy Loiacono Scholarship Fund
- Bob Jones Boy Scout Camping Fund
- The Hudson Foundation
- Nepenthe Foundation
- The Kip Fund
- Cookies for Children Stewardship Fund
- Voices for Children Stewardship Fund
- Central Coast Young Men’s Christian Association Stewardship Fund
- YWCA Monterey County Stewardship Fund

**Designated Funds**
Donors can support a designated agency over time with a permanent, protected stream of operating income.
- William S. and Janice R. Anderson Fund
- Arts Council for Monterey County Endowment Fund
- Tony P and Marjorie Ayres Fund
- Nancy Parker Benham Endowment Fund
- Central Coast Lighthouse Keepers Fund
- Cislini Fund
- Howard and Lynn Classen Endowment Fund
- The Gloria S. Daly Endowment Fund for All Saints’ Episcopal Day School
- Frances Elgan & Werner Kunkel Fund
- The Hermann Fletcher Fund
- The Robert Spier Foundation for the Big Sur Land Trust
- Voices for Children Stewardship Fund
- The Gloria S. Daly Endowment Fund for All Saints’ Episcopal Day School
- Rodney & Betty Gufoi Fund
- The Hudson Foundation
- Wicht & Mary T. Ingrim Fund
- Bob Jones Boy Scout Camping Fund
- The William Kiepura Fund
- Sandy Loiacono Scholarship Fund
- John H. Marble Endowment Fund
- Jane P. McKay Endowment Fund for the Big Sur Land Trust
- Voices for Children Stewardship Fund
- Jane P. McKay Endowment Fund for Door to Hope
- Jane P. McKay Endowment Fund for the Hartnell College Foundation Counselors’ Grants Program

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“No one is useless in this world who lightens the burdens of another.” - Charles Dickens

www.cfmco.org/waystogive
Monterey County Symphony Association Fund
Joyce Morris 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 foundation staff to create a meaningful philanthropic legacy.
Zekai and Carolyn Akcan Fund
Amy Anderson and George Somero Fund
Anonymous Donor Temporary Fund
Rick and Tonya Antle Fund*
Ausiono Family Fund
Peggy Downes Baskin Fund for Women’s Reentry
Lino and Teri Belli Family Fund
The Benjamin Family Foundation
Marla L. Bennett Fund
The Brown Family Fund
Buccafurni-Lawrence Fund
Buchalter/Adler Family Fund*
The Buffett Fund
Chappelle Youth, Arts, and Ecology Fund
Chris’s Fund
Friends of Community Animal Services Fund*
Scott Corvon Fund
Andrew & Phyllis D’Arigo Fund 2
D’Arigo-Martin Fund
Eric and Ila Davis Fund*
Ila Davis Fund*
Dekker Davidson Foundation*
Marcia F. DeVois Fund
DeWitt Fund
Helen R. Doe Fund
Doolittle Fund
Jean and Jim Duff Fund
Eimer/Cartwright Fund
Howard and Karin Evans Fund
Kobrinsky Evans Family Fund*
Davis Factor, Jr. and Christine B. Factor Fund
Farrell/Allen Carmel Rotary Fund
Farrell/Allen/LaSalle Carmel Rotary Fund*
Don Parker Fee Fund
Ted Fehring Family/Carmel Host Lions Club Fund
Lewis and Gloria Fenton Fund
Jose F. Fernandez Fund
Lori and Lou Flagg Memorial Youth Fund
Tom and Mary Kay Gallagher Fund
Gloria Fund
Jessica Govea-Thorbourne Memorial Fund
Harlan and Barbara Hall Fund
Dr. Adriana Hayward Fund
The Peter and Jackie Henning Fund
Joseph and Elizabeth Esthon Family Foundation*
Hicks Fund for the Arts
The Ann Mayer Hiller Memorial Fund
Elmer G. and William G. Hitchcock Fund
Mary and Peter Hobley Memorial Fund
Hodges Family Fund
Jeannine Smith-Holmquist Fund
Kadushin Robinson Fund
Jack and Patricia Kilmartin Fund
The Kohn Family Theatre and Arts Fund
Phyllis Geer Krystal Fund
The Landreth Family Fund
James and Susan Lansbury Fund
Jefferson and Frances Larkey Memorial Fund
Lee-Alexander Family Fund*
Phyllis and Herbert Lister Fund
Valera Whittford Lyles Fund
John and Kristina Magill Fund*
Mahoney/Peterson Family Fund
Cassy Martin/Vernon Fund
Monterey Rotary Club Fund
Catherine L. and Robert O. McMahan Fund
McMaham Family Fund
Marjorie McNeely Fund for the Blind
Lenore and Dale Meyer Fund
Malcolm and Joanne Millard Fund
Mills Family Fund
Monterey Peninsula Sunrise Rotary Club Fund
Howard and Anne Morgens Fund
Anthony and Lary Lynn Muller Fund
Gilbert M. Neill Math Fund
Nonella Family Fund*
Non-Point Source Projects Fund
Don Nuccio Fund for the Salinas Valley
F. Robert Nunes Family Fund
Oak Hill Charitable Fund
Mike and Mary Orradre Fund
Reese Family Fund
The Fred Rowden Memorial Fund
RSH Fund
Tom and Carol Russell Family Fund
Salinas Bovino Rotary Club Fund
Salinas Rotary Club Fund
Salinas Steinbeck Rotary Club Fund for the Salinas Valley
The James M. Shade Memorial Fund
Will and Mary Shaw Fund
Ramsey Shirk Fund
Cynthia Snort Fund
The Snort Fund
Robert and Leslie Taylor Fund
The Fred Terman and Nan Borreson Fund
Peter and Anne Thorp Fund
Trinidad Gomez Family Fund
William and Susanne Tyler Fund
Tyler Visiting Fellowship in Residence Fund*
Wiegand Family Foundation
Mark R. Wendland Memorial Fund
Willemsen Family Fund

**Field of Interest Funds**
Donors specify a charitable area of interest and the CFMC’s awards grants to organizations making a difference in our county.
Ruth L. and Wilbur K. Amonette Fund
Paul Block, Jr. Fund
Patricia J. Boles Fund
Maureen Bradford Fund
Stephen and Madeleine Conran Fund
The John & Mary Dawson Learning Fund
Thomas Dougd, Sr. and Anita M. Dougd Fund I
Ken and Gundy DuVall Fund
Fund for the Environment
Fred Farr Environmental Stewardship Fund
Rudy E. Futer Fund for Human & Humane Needs
Good Neighbor Basic Human Needs Fund
Gumm Fund for the Performing Arts
Elmer Mills Harris Fund
Douglas Madsen Fund for HIV/AIDS"Housing in Monterey County
The Fund for Homeless Women
(Non-Endowed Fund)
The Fund for Homeless Women
Terry Layne Fund for Beach Protection
Literacy Campaign Fund
The Todd Lueders Fund for the Arts
Kathleen and Howard Marks Fund
The McKay Fund
MPUSD Fund for the Arts
Engracia Irene Murray Field of Interest Fund
Margaret L. Musser Field of Interest Fund
Andrew D. and Marjorie S. Orrick Fund
Out Reach - A Fund for LGBT Life in Monterey County
Dr. Frank Pye Smith Medical Facilities Fund
Katherine Curtis Springer
Fibromyalgia and Chronic Fatigue Syndrome Patient Support Fund
Robert and Virginia Stanton Endowment Fund
Irving R. and Helen G. Stuart Fund
The James M. and Marjorie E. Sturgeon Fund
Evelyn and Spencer Thompson Fund to Help Feed the Hungry
Dr. George & Sam Kih Thorngate Family Fund
Tri-Counties Blood Bank Fund
Anita Tarl Turk Fund for Breast Cancer Research
Women’s Fund Endowment
Youth Fund

**General Endowment Funds**
Donors place their trust in the CFMC’s expert staff and board to respond to the community’s most pressing needs now and into the future.
Fund for the 21st Century
Kathleen and Austin Barrows Fund
Wendy (Millard) Benjamin Fund
CFMC Trustees Fund
Cislini Fund #2
Mary Jane Dransford Family General Endowment Fund of the Community Foundation
Marilyn & Phil Holland Fund
Lauralie and J. Irene Fund
George P. and Betty Kendall Memorial Fund
Leo Lanihi Fund
The Barbara and Joseph Lee Fund
The John and Nancy Love Fund
John R. Marron Fund
Neighborhood Grants Program Fund
Opportunity Fund
The Donna Roop Endowment Fund
The Scott Fund

**Private Foundation Funds**
These funds offer 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
Pathways to Safety
Tassajara Fire Fund*

*Fund Created in 2015

James Bliss & Annette Sward Forestry & Nursing Scholarship Fund
Margaret and Seba Bronson Scholarship Fund
Carol C. W. Butterfield Bacon Scholarship Fund
The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship Fund
California Polytechnic State University Agriculture Business Department Endowment Fund
Carmel High School Class of 1952 Fund
Bill Clapper Memorial Music Scholarship Fund
The Nancy Wheels Dod Fund
The Elkhorn Slough Foundation’s James Rote & Les Strnad Scholarship Fund
David L. Ferguson Scholarship Fund
Matthew Paul Finngan Memorial Scholarship Fund
Flagg Scholarship Holding Fund
The Allen S. Griffin Fund
Geraldyn R. Griffith Memoral Scholarship Fund
Hausdorf Family Scholarship Fund
Kier Memorial Scholarship Fund
Howard and Gretchen Leach Scholarship Fund
The Morse Foundation Scholarship Fund*
Robert Hattori Nakamura Memorial Scholarship Fund
Anthony Leo Nakamura Memorial Baseball Endowment
Dr. Gladys M. Olvis Scholarship Fund
Kristopher Pallastrini Fund
Richard Scott Reynolds Science and Technology Education Scholarship Fund
San Ardo Foundation for Education
Theodore R. Sarbin Research and Scholarship Award Fund
The Harles R. Sarmon College Endowment
Alan and Rita Shugart Scholarship Fund
Joseph and Betty Spradling Scholarship Fund
Robert Stanton Award Fund
Wilbur H. and Maxine D. Stevens Scholarship Fund
Charles Joseph Watts Scholarship Fund
Shelly Watts Scholarship Fund
Horace H. Wilson Scholarship Fund

**Temporary Funds**
Funds established for specific projects or initiatives with a limited timeframe
Alert Monterey County Fund
Casa Amelia Garden and House Fund
Center for Nonprofit Excellence Community Leadership Project
Rudolph E. Futer Restricted Purpose Fund
Girls Health Initiative
The Monterey Experience Project Fund
Pathways to Safety

23
The CFMC is “Here for Good.”

Financial Stewardship

The motto of the CFMC is “Here for Good.”

The board of directors and staff steward the assets entrusted to us for the good of Monterey County in perpetuity. With a distinguished investment committee and the consultancy of Verus, we invest these resources for the long term, to protect and preserve the endowment, while allowing growth to fuel future grantmaking. The CFMC is confirmed in compliance with rigorous National Standards for U.S. community foundations. For more information and answers to frequently asked questions, visit our website.

www.cfmco.org/finances

CFMC Investment Committee Seated (l to r) Craig Johnson, Bill Sharpe, Ken Petersen, Dan Baldwin. Standing (l to r) Steve McGowan, Steve Dart, Ann Westrich (Verus), Bill Doolittle, David Benjamin (not pictured: Ida Lopez Chan, Gail Delorey, Tina Starkey Lopez, Jimmy Panetta)

Donor Advised 48%
Designated 20%
Community Impact 17%
Discretionary 9%
Scholarships & Awards 3%
Organizational Development 1%
Opportunity 1%
Neighborhood Grants <1%
Affiliate Fund <1%

TYPES OF GRANTS

Donor Advised $4,740,030
Designated 2,004,505
Community Impact 1,688,165
Discretionary 844,306
Scholarships & Awards 319,401
Organizational Development 75,000
Opportunity 51,705
Neighborhood Grants 45,500
Affiliate Fund 10,100

$9,778,712

TYPES OF GRANTS BY REGION

Countywide
Monterey Peninsula
Salinas/Salinas Valley
Multiple Areas
North County
Big Sur
South County
Outside Monterey County

Countywide $4,314,551
Monterey Peninsula 2,038,470
Salinas/Salinas Valley 1,577,693
Multiple Areas 213,504
North County 186,382
Big Sur 112,124
South County 75,394
Outside Monterey County 1,260,596

$9,778,712
# COMMUNITY FOUNDATION FOR MONTEREY COUNTY

## CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2015

### ADDITIONS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions*</td>
<td>16,240,617</td>
</tr>
<tr>
<td>Other income</td>
<td>407,025</td>
</tr>
<tr>
<td><strong>Total revenues and support</strong></td>
<td><strong>16,647,642</strong></td>
</tr>
</tbody>
</table>

### INVESTMENT LOSS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total investment loss</strong></td>
<td>(3,530,922)</td>
</tr>
</tbody>
</table>

### GRANTS AND EXPENSES

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants*</td>
<td>9,343,991</td>
</tr>
<tr>
<td>Other operating expenses</td>
<td>2,902,370</td>
</tr>
<tr>
<td><strong>Total grants and expenses</strong></td>
<td><strong>12,246,361</strong></td>
</tr>
</tbody>
</table>

### INCREASE IN NET ASSETS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total increase in net assets</strong></td>
<td><strong>870,359</strong></td>
</tr>
</tbody>
</table>

### NET ASSETS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of year</td>
<td>149,708,295</td>
</tr>
<tr>
<td><strong>End of Year</strong></td>
<td><strong>150,578,654</strong></td>
</tr>
</tbody>
</table>

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

## CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2015

### ASSETS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and equivalents</td>
<td>10,980,840</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>1,338,471</td>
</tr>
<tr>
<td>Other assets</td>
<td>34,090</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>1,773,185</td>
</tr>
<tr>
<td>Investments, carried at market value</td>
<td></td>
</tr>
<tr>
<td>Mutual funds and equities</td>
<td>138,696,168</td>
</tr>
<tr>
<td>Cash and money market funds</td>
<td>7,825,192</td>
</tr>
<tr>
<td>Charitable gift annuities</td>
<td>255,003</td>
</tr>
<tr>
<td>Beneficial interest in remainder trusts administered by other trustees</td>
<td>3,198,985</td>
</tr>
<tr>
<td>Investments held in charitable remainder trusts</td>
<td>16,182,264</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>180,284,198</strong></td>
</tr>
</tbody>
</table>

### LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants payable</td>
<td>1,842,024</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>90,472</td>
</tr>
<tr>
<td>Liabilities under split-interest agreements and charitable remainder trusts</td>
<td>11,603,349</td>
</tr>
<tr>
<td>Funds held for others</td>
<td>16,169,699</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>29,705,544</strong></td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>150,578,654</strong></td>
</tr>
</tbody>
</table>

The condensed financial information was prepared based upon audited financial statements prepared by RGP LLP.

## YEAR END TOTAL ASSETS

- **2015**: $180,284,198
- **2014**: $177,868,215
- **2013**: $173,143,482
- **2012**: $155,790,404
- **2010**: $137,678,876
- **2008**: $112,873,206
- **2006**: $87,723,206
- **2004**: $63,090,161
- **2002**: $63,090,161

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

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BOARD OF DIRECTORS

Back (l to r):
- Jimmy Panetta, Monterey County Deputy District Attorney
- Steve McCowan, former CFO and EVP Corporate Resources, Sun Microsystems, Inc.
- Kenneth R. Wright, Community Volunteer, Retired California Highway Patrol
- Judge John M. Phillips (retired), Monterey County Supervisor, District 2
- Ken Petersen, President, Monterey Private Wealth
- Greg Chilton, Attorney at Law, Chilton & House, LLP
- Birt Johnson, Jr. Community Volunteer, former GM, AT&T
- Catherine Kobinsky Evans, Partner, The Kobinsky Group
- Stephen Dart, Principal, Dart Family Co. Inc.
- Rick Kennyer, Attorney at Law, Johnson, Fanti & Kennyer, LLP

Front (l to r):
- Betsy Buchalter Adler, Trustee and Program Officer, Claire Giannini Fund
- Patti M. Hiramoto, AVP of Inclusive Excellence, Chief Diversity Officer, CSU Monterey Bay
- Erica Padilla-Chavez, CEO, Pajaro Valley Prevention and Student Assistance
- Anna Marie Ponce, Sun Valley Berries, LLC
- Gail Delorey, CPA, Partner, Bianchi, Kasavan & Pope, LLP
- Ida Lopez Chan, Senior Vice President, Wells Fargo Bank
- Tonya Antle, Community Volunteer, Principal, Tanimura & Antle

Not Pictured:
- Tina Starkey Lopez, Owner, JV Automobiles
- Raul Rodriguez, Owner La Plaza Bakery

We are especially grateful to Alfred Diaz-Infante, President/CEO, CHISPA, for his service which ended in 2015.

STAFF

Standing (l to r)
- Dan Baldwin, President/CEO
- Kaki Rusmore, Director Center for Nonprofit Excellence
- Karina Gutierrez, Grants & Office Administrator
- Josh Warburg, Philanthropic Services Officer
- Cristina Dirksen, Communications Associate
- Lynn Bentaleb, Program Officer
- Diane Nonella, Director of Finance & Human Resources
- Amanda Holder, Director of Communications
- Susie Polnaszek, Program Officer
- Brian Thayer, Senior Philanthropic Services Officer
- Jan McAlister, Development Associate
- Arlene Wall, Administrative Coordinator

Seated (l to r)
- Janet Shing, Senior Program Officer
- Julie Conrad, Administrative Services Manager
- Christine Dawson, Vice President of Philanthropic Services
- Laurel Lee-Alexander, Vice President of Grants and Programs
- Aurelio Salazar, Jr., Program Officer and Latino Philanthropic Services

Not pictured:
- Guadalupe Aguilara, Administrative Coordinator
- Phillip Carey, Accounting Manager
- Eva Holt Rusmore, Girls’ Health in Girls’ Hands Program Manager

We are especially grateful to Alfred Diaz-Infante, President/CEO, CHISPA, for his service which ended in 2015.
2015 Committees

BOARD COMMITTEES

Executive Committee
Rick Kennifer (Chair), Greg Chilton (Vice Chair), Steve McGowan (Secretary), Tina Starkey Lopez (Treasurer), Gail Delorey, Alfred Diaz-Infante, Ken Petersen

Audit Committee
Ken Wright (Chair), Gail Delorey, Rick Kennifer, Tina Starkey Lopez

Grants and Programs Committee
Alfred Diaz-Infante (Chair), Ida Lopez Chan, Erica Padilla-Chavez, Catherine Kobrinsky Evans, Patti Hiramoto, John Phillips, Anna Marie Ponce, Ken Wright

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

Finance Committee
Tina Starkey Lopez (Chair), Steve Dart, Gail Delorey, Rick Kennifer, Ken Wright

Governance Committee
Gail Delorey (Chair), Alfred Diaz-Infante, Ken Petersen, Rick Kennifer, Ken Wright

Resource Development
Greg Chilton (Chair), Tonya Antle, Kurt Gollnick, Steve McGowan, Erica Padilla-Chavez, Jimmy Panetta, Raul Rodriguez

ADVISORY COMMITTEES

Community Impact Grants
Ida Lopez Chan, Patti Hiramoto, Ken Wright (Committee Chairs): Paulette Bumbalough, Greg Chilton, Meg Clovis, Steve Dennis, Alfred Diaz-Infante, Oscar Flores, Sharon Gish, Bruce Graham, Diana Jimenez, Catherine Kobrinsky Evans, Chris Lopez, Judy MacClelland, Regina Mason, Chris Moss, Reyna Navarrete, Chris Orman, Erica Padilla-Chavez, John Phillips, Seth Pollack, Francine Rodd, Brenda Shinault, Rosemary Soto, John Sourkes, Rose Vasquez, Mark Verbonich

Professional Advisor Council
Cris Cabanillas, Monterey Private Wealth; Greg Chilton, Chilton & House, LLP; Gail Delorey, Bianchi, Kasavan & Pope, LLP; Bruce Dunlap, Hayashi Wayland; Nick Fantl, Johnson, Fantl & Kenifer, LLP; Leslie Finnegan, Noland, Hamerly, Etienne & Hess; Liza Horvath, Monterey Trust Management; Rick Kennifer, Johnson, Fantl & Kenifer, LLP; Kathy Kobata, Tostevin Accountancy Corporation; Kyle Krasa, Krasa Law; Anne Leach, Ottone, Leach, Olsen & Ray LLP; Gifford Lehman, Integris Wealth Management; Stephen W. Pearson, Noland, Hamerly, Etienne & Hess; Ken Petersen, Monterey Private Wealth, James Stiles, Hayashi Wayland

Real Estate Advisory Committee
Rick Kennifer (Chair), Sarah Bouchier, Thomas Bohnen, Christine Chin, Catherine Kobrinsky Evans, James Heisinger, John Mahoney, Bill Mitchell, Ken Wright

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

Robert and Virginia Stanton Endowment Committee
Ramona Smith (Chair), Iathan Annand, Stephen Dart, Kip Hudson, Rick Kennifer, Breck Tostevin

Women’s Fund Leadership Council
Tonya Antle (Chair), Barbara Babcock, Sarah Bouchier, Kevin Cartwright, Julie Cason, Margaret D’Arrigo-Martin, Vanessa Diffenbaugh, Jeri Gattis, Krista Hanni, Stephanie Harkness, Felicia Perez Kausin, Kate Daniels Kurz, Kim Negri, Judie Profeta, Diane Danvers Simmons, Jeannie Tanimura, Traci Townsend-Gieg, Maija West

IN MEMORIAM

Richard W. LaSalle
WHEN TO BEGIN
While anytime is a good time, consider a fund when:
• A financial event occurs 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 months and financial expense required to create a private foundation. Your gift of $5,000 or more can create a donor advised fund today.

MAKE A DIFFERENCE
Partner with Us
You can make a difference and enhance your philanthropy through a fund at the Community Foundation for Monterey County in three simple steps.

START A FUND  It’s simple!

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

2 CHOOSE
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.

3 GIVE
Recommend grants from the fund. We can help you make a difference on issues and causes that matter to you, in Monterey County and beyond.

JOIN US!
Give us a call at 831.375.9712 or learn more on our website.

"The fund will always be there honoring him and will give back to the community in perpetuity.”
– Patricia Gomez

www.cfmco.org/donors
THANK YOU!
Our accomplishments are only made possible through your support and partnership.

2015 HIGHLIGHTS

- Created Women’s Fund
- 160 NONPROFITS STRENGTHENED through Center for Nonprofit Excellence
- NEW STRATEGIC Plan
- Granted $9.8 MILLION
- Received $18.6 MILLION in gifts
- 199 LEGACY SOCIETY Members
- Monterey County Gives! $3.17 MILLION
- Grant
  $9.8 MILLION
- Monetary
  Foundation
- Reconciliation
  $18.6 MILLION
- New
  Strategic
  Plan
- 160 Nonprofits
  Strengthened
- Created Women’s Fund
- Leadership
  Councils
- 199 Legacy
  Society
- Monterey County
  Gives!
- $3.17 Million

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

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

info@cfmco.org
www.cfmco.org
www.facebook.com/cfmco
@cfmco

BACK COVER PHOTO: Neighborhood Grants Program Award Ceremony / Photo by Richard Green

Annual Report design by TMD Creative
Healthy, Safe, Vibrant COMMUNITIES