



# GIVING. TOGETHER.



*Here for Good*

**Community Foundation**  
for Monterey County

2015 ANNUAL REPORT



## GIVING TOGETHER

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## MISSION

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

## VISION

Healthy, safe, vibrant  
communities

FRONT COVER PHOTOS: Legacy Society Luncheon / Photo by Richard Green  
Youth team building at The Epicenter, Salinas

## 2015 QUICK FACTS

**TOP 100**  
community  
foundations in the  
US (in asset size)\*

*\*Columbus Survey 2015*

**\$9.8  
MILLION**  
grants, awards and  
scholarships approved  
to 503 grantees

**\$137  
MILLION**  
in cumulative  
grantmaking  
since 1981

**\$18.6  
MILLION**  
in contributions  
received

**1.42%**  
total operating  
expenses were 1.42%  
of total assets

**\$180  
MILLION**  
assets grew to  
a record \$180  
million

**29  
NEW  
FUNDS**  
created

# Message to the Community

FROM THE CHAIR & PRESIDENT/CEO



# GIVING. TOGETHER.

"This report...  
reflects our  
county's great  
philanthropic spirit."  
– Dan Baldwin

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 Kenifer  
2015 Board Chair

Daniel R. Baldwin  
President/CEO

DONORS

FUNDERS

HEALTHY,  
SAFE, VIBRANT  
COMMUNITIES

NONPROFITS

PROFESSIONAL  
ADVISORS

## 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



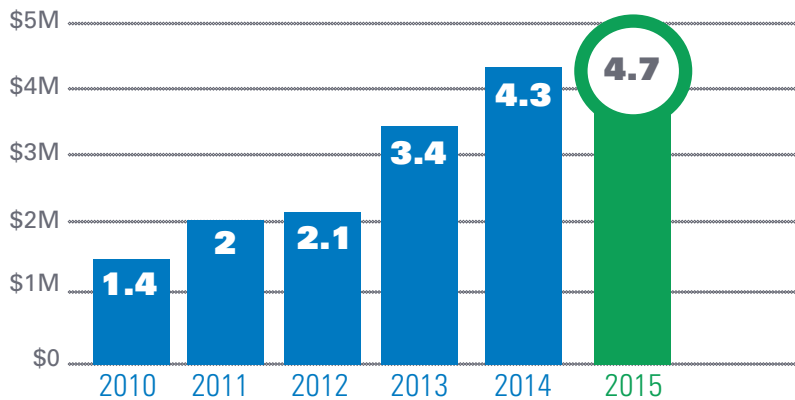


## CO-INVESTMENT

### 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



## 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.

• CFMC donor advisors played a key role in assisting the Food Bank for Monterey County

• (l to r) Kevin Cartwright and Steve Eimer



"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."



“The record response surpassed all expectations. Monterey County gave together in a big, big way.”  
— Dan Baldwin, CFMC President/CEO

## 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.



*MC Gives! Partners: Monterey County Weekly, the Community Foundation for Monterey County, Monterey Peninsula Foundation, David and Lucile Packard Foundation, Neumeier Pomo Investment Counsel, Cannery Row Company. Sponsors: Whole Foods Monterey, and the Doolittle, Jean and Jim Duff, Will and Mary Shaw, Cynthia Snorf Funds of the Community Foundation for Monterey County. The Monterey County Weekly Community Fund is a donor advised fund of the CFMC.*

## 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

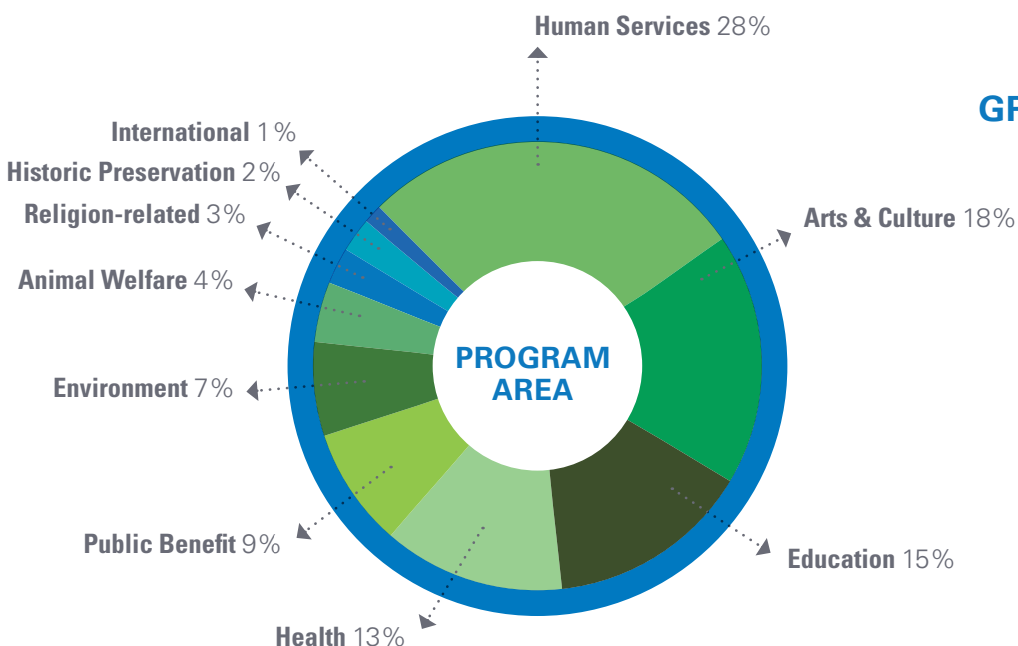
The CFMC collaborates with local funding partners to support and enhance programs for increased impact. Grants from the Peggy and Jack Baskin Foundation, College Futures Foundation, Claire Gianinni Fund, Monterey Peninsula Foundation, David and Lucile Packard Foundation and Tides Foundation supported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



• The Epicenter, a youth-led community center in Salinas



### GRANTS BY PROGRAM AREA

|                       |              |
|-----------------------|--------------|
| Human Services        | \$ 2,725,205 |
| Arts & Culture        | 1,781,411    |
| Education             | 1,437,587    |
| Health                | 1,283,191    |
| Public Benefit        | 840,698      |
| Environment           | 653,441      |
| Animal Welfare        | 425,969      |
| Religion-related      | 256,728      |
| Historic Preservation | 237,309      |
| International         | 137,171      |
|                       | <hr/>        |
|                       | \$9,778,712  |



## GRANTMAKING STORIES

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](http://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.





• GHGH participants: (l to r) Destynee Gray, Naudia Velarde, Olivia Johnson / Photo by Richard Green

## WOMEN'S FUND Changing Lives of Women & Girls

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.



• Women's Fund luncheon supporters and speakers



• Girl leaders after addressing Monterey County Board of Supervisors



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



# GIRLS' HEALTH IN GIRLS' HANDS

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**

*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.*

## 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.

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

• (l to r) Girl leaders  
Salma Aredondo and  
Jocelyn Ramos

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.



## Bubbles & Bags

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.



• Above: (l to r) Stephanie Harkness, Judie Profeta, Christine Benson, Tonya Antle, Judy Furman  
• Below: Fall Summit

• Girls Leadership Network



**"We should be role models for the girls in our community!"**  
- GHGH Participant







## 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 we 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](http://www.cfmco.org/CNE)

• Ricardo Nunez Maravilla of the UFW Foundation shares impact of Futer grant



"Helping our fellow nonprofits work and learn together helps them improve the quality of life in our region."  
– Kaki Rusmore  
Director, Center for Nonprofit Excellence

• Board chairs gathered monthly to learn from one another



"We've developed several new programs and improved the quality of our services and are now reaching more people than ever before!"  
– Robin McCrae, CEO  
Community Human Services



• Futer Grantees Celebration /  
Photo by Randy Tunnell

# 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](http://www.cfmco.org/scholarships)

• Scholarship recipient Alexander Baskoro, the first in his family to go to college, attends UC Berkeley



“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



• Morse Foundation Scholarship Recipients

• Jennifer Campbell, nursing student at Monterey Peninsula College and recipient of the James Bliss & Annette Sward Forestry & Nursing Scholarship





## 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



"I always just  
wanted to help  
somebody."  
– Nancy Ausonio

• CFMC fund holder and Legacy Society member, Nancy Ausonio, Christine Dawson, Vice President of Philanthropic Services

## 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."

• Annual Celebration of Philanthropy

• Rick Kennifer, Nancy Ausonio, Dan Baldwin



Photos by Randy Turnell



## 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.



"When you can start giving back, you are paying it forward."  
- Rick and Tonya Antle

Richard Green

## 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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"These improvements will allow us to process and track purchases and inventory more efficiently."

- Betsy Oltmann

## ORGANIZATIONAL DEVELOPMENT GRANT BOOSTS CAPACITY FOR SOL TREASURES

Sol Treasures is an art and cultural enrichment center in King City, and its gallery is an important source of earned income. Its small staff continues to take steps to develop as an organization and in 2015 completed a technology assessment and plan. Thanks to online technology training provided through the Center for Nonprofit Excellence, they prioritized tools to fully automate their manual sales systems. A \$4,000 Organizational Development grant supported office hardware upgrades, point of sale equipment for the shop and installation support.

"So much [technology information] is out there and it can be hard to make sense of it all. The training simplified our next steps and the grant helped make them possible," said Betsy Oltmann, Executive Director.

Organizational Development grants support one-time activities that strengthen an organization's ability to function effectively and efficiently.

• Above: Sonia Chapa, Sol Treasures

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• *Past Chair luncheon (Back l to r) Dan Baldwin, David Armanasco, Kip Hudson, Dick Borda, Bill Doolittle, Bob House, Kevin Cartwright, Craig Johnson, (Front l to r) Clay Larson, Ann Brown, Gail Delorey, Bertie Elliott, Rick Kennifer*

• *Mark Peterson, Ann and John Mahoney at Legacy Society Luncheon*



"We make a living  
by what we get. We  
make a life by what  
we give."  
- Winston S. Churchill







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

## 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.

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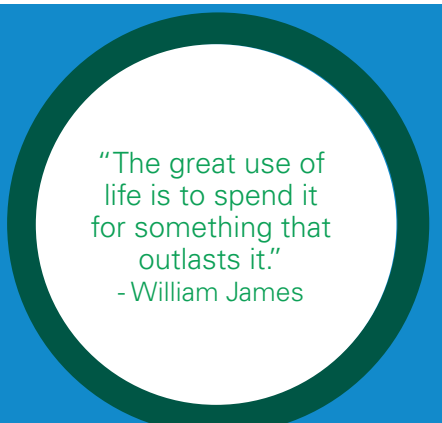
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Watsonville Wetlands Watch

• Howard and Karin Evans

• 2015 LEAD participants



"Never believe that a few caring people can't change the world. For, indeed, that's all who ever have."  
- Margaret Mead





"The  
Community  
Foundation  
means 'Trust.'"  
– Bertie Elliott

## GIVING TOGETHER Creating a Legacy

Many people have entrusted the CFMC with their philanthropic vision by leaving a planned gift through their estate. Gifts can be unrestricted, for a field of interest or designated. We carry out each donor's wishes so they can have peace of mind knowing their intentions will be honored in the future.

### Legacy Society

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.

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

• Legacy Society Luncheon / Photo by Randy Tunnell

Anonymous (7)  
Mrs. Wilbur K. Amonette\*  
Tonya and Rick Antle  
Yvonne A. Ascher and  
Leonard Laub  
Tony P. Ayres  
Daniel R. Baldwin and  
Anne Ylvisaker  
Robert P. Balles  
John B. Bergin\*  
Paul P. Bianchi  
Nancy Bletzer  
Joyce Blevins and  
Katherine M. Coopman  
James W. Bogart  
Thomas Bohnen  
Jay and Ann Brown  
Julie A. Cason and  
Lisa K. Crawley  
Joseph and Betty Chaffers  
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 Dekker-Davidson,  
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 B. Elliott  
Norma Esselstyn  
Lowel I. Figen  
Cyrus and Jean Fitton  
Crawford E. and Linda P. Foy  
Susie and Charly Franklin  
Joel S. and Dena Gambord  
James and Jeri Gattis  
Donald and Frances Gaver  
Rodney Guilfoil\*  
Terry Haber  
Ruth Hartmann  
Peter C. Hatton  
Virginia O. Hawes  
Dick Hawkinson\*  
Thomas Hawley  
Carol and Don Hilburn  
Richard Hobbey and  
Deborah Steel  
Jeffrey and Amanda Holder  
Jeanne S. Holmquist  
Robert and Millie House  
Chris and Tola Hubbard  
Jack Jewett  
Craig and Christine Johnson  
Joanne Taylor Johnson  
Mark and Susan Johnson

Karen D. Kadushin  
Mary Ann Kane  
Rick and Martha Kennifer  
Alice V. Kinsler  
Paul Lawrence and  
Marian Buccafurni  
Douglas C. Lee  
Laurel Lee-Alexander  
Jennifer L. Levey  
David S. and Norma Lewis  
Esther H. Lindsey  
Robert H. Lindsey  
Janette Loomis  
Todd Lueders  
Valera W. Lyles  
Thomas and  
Kathy Macdonald  
John and Ann Mahoney  
Jan and Tannie Mandel  
Roger and Carolann Manley  
Michael and Tobi Marcus  
Joseph A. and Sheila Mark  
Jan McAlister  
Sherrie McCullough  
Terry A. McHenry and  
Joan Smith McHenry  
Thomas D. Melville  
Lenore Meyer\*  
Malcolm\* and  
Joanne Millard  
Sidney Morris  
Tony and Lary Lynn Muller  
Alec and Kim Murdock  
David M. Nee

Vicki Nelson  
Diane R. Nonella  
F. Robert Nunes  
Alfred P. Oliverio  
Charles Olvis and  
Miranda Morris  
Mike and Mary Orradre  
Nicholas M. and  
Nicollette Pasculli  
John Phillips and  
June Dunbar Phillips  
Gregory A. and  
Winoma Plaskett  
Margaret L. Radunich  
Rex and Joan Reade  
Reid-Robnett Family Trust  
Paul Rochester\*  
Lee and Shirley Rosen  
Jean Rudolph\* The Loralie  
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  
Judith Sulsona and  
Bill Rawson  
Tom Sweeney  
Robert and Leslie Taylor  
Frederick W. Terman and  
Nan Borreson  
Brian Thayer  
Peter and Anne Thorp  
Vincent and Evelyn Torras  
William H. and  
Susanne 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 P. and Jill Wiegand  
Kenneth and Mary Wright  
Richard Zahm

\*In memoriam

“

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)



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

• Ventana  
Wilderness  
Alliance

## Our Family of Funds

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.



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

### Affiliate Funds

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

Southern Monterey County Foundation  
Southern Monterey County Foundation (Non-Ended)

### Agency Endowment Funds

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

39 Craftsmen Fund for Monterey County Youth Museum  
Alliance on Aging Endowment Fund  
Alzheimer's Association of Monterey County  
Big Sur Health Center Endowment Fund  
The Big Sur Land Trust Conservation Fund  
Blind and Visually Impaired Center Fund  
Laurie Boone Hogen Appreciation Fund for Excellence in Teaching  
The Boys and Girls Club of the Monterey Peninsula Fund  
Carl Cherry Center for the Arts Fund  
Carmel Music Society Endowment Fund  
Carmel Public Library Foundation Fund  
Carmel Public Library Foundation - Children's Fund  
Friends of the Carmel Valley Library Fund  
Carmel Woman's Club Fund  
Casa Amesti Foundation Building Endowment Fund  
David Allen Bernahl II, Local Heroes Fund for CASA  
Center for Photographic Art Fund  
Chamber Music Monterey Bay Fund  
Chartwell School Scholarship Endowment Fund  
Children's Services International Fund  
Community Partnership for Youth Fund  
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  
Meals on Wheels of the Monterey Peninsula Fund  
Meals on Wheels of Salinas, Inc. Fund  
Eve Mills Memorial Fund for Meals on Wheels Salinas Valley  
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  
Monterey County Historical Society Fund  
Monterey History and Art Association Endowment Fund  
Monterey Museum of Art Fund  
Monterey Public Library Fund  
MPC Women Supporting Women Endowment Fund  
Museum Foundation of Pacific Grove Fund  
Natividad Medical Foundation Fund  
Danny Nugent Memorial Campership Fund  
Ombudsman for Long-Term Care Fund  
Operating Endowment Fund  
Nellie Irons Orr Scholarship Fund  
Pacific Repertory Theatre Endowment  
Project Helping Hand Fund  
Salinas Rodeo Rotary Club Foundation Agency Endowment Fund  
Friends of the Salvation Army Monterey Peninsula Fund  
Sylvia W. Schwarz Endowment for Reading Improvement at Tularcitos School  
Shelter Outreach Plus Fund  
SPCA of Monterey County Fund  
St. Timothy Foundation, Inc. Fund  
Sunset Theater Endowment Fund  
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 Fund

### Carmel Heritage Society Stewardship Fund\*

Carmel Valley Kiwanis Foundation Stewardship Fund  
Carmel Woman's Club Stewardship Fund

### Central Coast Veterans Cemetery Foundation Stewardship Fund\*

Central Coast VNA and Hospice, Inc. Stewardship Fund  
Chamber Music Monterey Bay Stewardship Fund  
Church in the Forest Stewardship Fund  
Community Human Services 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  
Friends of the Marina Library Stewardship Fund  
Methodist Foundation of Pacific Grove Stewardship Fund  
Museum Foundation of Pacific Grove Stewardship Fund  
Pacific Grove Public Library Foundation Stewardship Fund

### Peace of Mind Dog Rescue Stewardship Fund\*

Rancho Cielo Youth Stewardship Fund  
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 Community Fund  
Nepenthe/Phoenix Corporation 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  
Cisluni Fund  
Howard and Lynn Classen Endowment  
The Gloria S. Daly Endowment Fund for All Saints' Episcopal Day School  
Frances Elgan & Werner Kunkel Fund  
The Herman Fletcher Fund  
A Fork in the Road-A Fund Providing a Path to a Science Career  
John Gill ALS Patient Support Fund  
Hester Hyde Griffin Fund for All Saints Day School  
Rodney & Betty Guilfoil Fund  
The Hudson Fund  
Ward D. and Mary T. Ingram Fund  
Bob Jones Boy Scout Camping Fund  
The William Kiepora Fund  
Sandy Loiacono Scholarship Fund  
John H. Marble Endowment Fund  
Jane P. McKay Endowment Fund for the Big Sur Land Trust Fellowship Program  
Jane P. McKay Endowment Fund for Door to Hope  
Jane P. McKay Endowment Fund for the Hartnell College Foundation Counselors' Grants Program

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\***

Ausonio Family Fund  
Peggy Downes Baskin Fund for Women's Reentry  
Lino and Teri Belli Family Fund  
The Benjamin Family Foundation  
Marta L. Bennett Fund  
The Brown Family Fund  
Buccafurni-Lawrence Fund

**Buchalter/Adler Family Fund\***

The Buffett Fund  
Chappellet Youth, Arts, and Ecology Fund  
Chris's Fund

**Friends of Community Animal Services Fund\***

Scott Corwon Fund  
Andrew & Phyllis D'Arrigo Fund 2  
D'Arrigo-Martin Fund

**Eric and Ila Davis Fund\***

**Ila Davis Fund\***

**Dekker Davidson Foundation\***

Marcia F. DeVoe Fund  
DeWitt Fund  
Helen R. Doe Fund  
Doolittle Fund  
Jean and Jim Duff Fund  
Eimer/Cartwright Fund  
Howard and Karin Evans Fund  
**Kobrinisky Evans Family Fund\***  
Davis Factor, Jr. and Christine B. Factor Fund

Farrell/Allen Carmel Rotary Fund

**Farrell/Allen/LaSalle Carmel Rotary Fund\***

Doris Parker Fee Fund  
Ted Fehring Family/Carmel Host Lions Club Fund  
Lewis and Gloria Fenton Fund  
Jose F. Fernandez Fund  
Lori and Lou Flagg Memorial Youth Fund

Tom and Mary Kay Gallagher Fund  
Gloria Fund

Jessica Govea-Thorbourne Memorial Fund

Harlan and Barbara Hall Fund  
Dr. Adriana Hayward Fund  
The Peter and Jackie Henning Fund

**Joseph and Elizabeth Heston 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  
Jeanne Smith-Holmquist Fund  
Kadushin Robinson Fund  
Jack and Patricia Kilmartin Fund  
The Kohn Family Theatre and Arts Fund  
Phyllis Geer Krystal Fund  
The Landreth Family Fund  
James and Susan Lansbury Fund  
Jefferson and Frances Larkey Memorial Fund

**Lee-Alexander Family Fund\***

Phyllis and Herbert Lister Fund  
Valera Whitford Lyles Fund  
**John and Kristina Magill Fund\***  
Mahoney/Peterson Family Fund  
Cappy Martin/Vernon Hurd  
Monterey Rotary Club Fund  
Catherine L. and Robert O. McMahan Fund  
McMahan Family Fund  
Marjorie McNeely Fund for the Blind or Illiterate

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 Nucci Fund for the Salinas Valley  
F. Robert Nunes Family Fund  
Oak Hill Charitable Fund  
Mike and Mary Orradre Fund  
Reese Family Fund  
The Fred Rowden Memorial Fund  
RSH Fund

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

## Field of Interest Funds

*Donors specify a charitable area of interest and the CFMC awards grants to organizations making a difference in our county*

Ruth L. and Wilbur K. Amonette Fund  
Paul Block, Jr. Fund  
Patricia J. Boles Fund  
Maureen Bradford Fund  
Stephen and Madeleine Conran Fund  
The John & Mary Dawson Learning Fund

Thomas Doud, Sr. and Anita M. Doud Fund 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 Tarr Turk Fund for Breast

Cancer Research  
Women's Fund Endowment

Youth Fund

## General Endowment Funds

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

Fund for the 21st Century  
Kathleen and Austin Barrows Fund  
Wendy (Millard) Benjamin Fund  
CFMC Trustees Fund  
Cislino Fund #2

Mary Jane Drummond Fund  
General Endowment Fund of the

Community Foundation  
Marilyn & Philo Holland Fund

Lauralie and J. Irvine Fund  
George P. and Betty Kendall

Memorial Fund

Leo Lanini Fund

The Barbara and Joseph Lee Fund  
The John and Nancy Love Fund

John R. Marron Fund

Neighborhood Grants Program Fund  
Opportunity Fund

The Donna Roop Endowment Fund  
The Scott Fund

## Private Foundation Funds

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

The Joel and Dena Gombard 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 and support individuals with the help of professional staff*

Monica Abbott Scholarship Fund  
AIA Monterey Bay Concepts

Competition Fund

Dr. William D. Barr Scholarship Fund for Excellence in Educational Leadership

Dr. Roger and Kate Bartels Memorial Scholarship Fund

The Bissell Fund

James Bliss & Annette Sward Forestry & Nursing Scholarship Fund

Margaret and Seba Bronson Scholarship Fund

Carol C. W. Butterfield Bacon Scholarship Fund

The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship Fund

California Polytechnic State University Agriculture Business Department Endowment Fund

Carmel High School Class of 1952 Fund

Bill Clapper Memorial Music Scholarship Fund

The Nancy Wheelis Dodd Fund

The Elkhorn Slough Foundation's James Rote & Les Strnad Scholarship Fund

David L. Ferguson Scholarship Fund  
Matthew Paul Finnigan Memorial Scholarship Fund

Flagg Scholarship Holding Fund  
The Allen S. Griffin Fund

Geraldyn R. Griffith Memorial Scholarship Fund

Hausdorf Family Scholarship Fund  
Kier Memorial Scholarship Fund

**Howard and Gretchen Leach Scholarship Fund\***

**The Morse Foundation Scholarship Fund\***

Robert Hattori Nakamura Memorial Scholarship Fund

Anthony Nicholas Narigi Memorial Baseball Endowment

Dr. Gladys M. Olvis Scholarship Fund  
Kristopher Pallastri Fund

Richard Scott Reynolds Science and Technology Education Scholarship Fund

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

The Harles R. Sarment College Endowment

Alan and Rita Shugart Scholarship Fund

Joseph and Betty Spradling Scholarship Fund

Robert Stanton Award Fund  
Wilbur H. and Maxine D. Stevens Scholarship Fund

Charles Joseph Watts Scholarship Fund

Shelley Watts Scholarship Fund  
Horace H. Wilson Scholarship Fund

**Temporary Funds**

*Funds established for specific projects or initiatives with a limited timeframe*  
Alert Monterey County Fund  
Casa Amesti 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  
**Tassajara Fire Fund\***

**\*Fund Created in 2015**



The CFMC is  
"Here for Good."

## GIVING TOGETHER

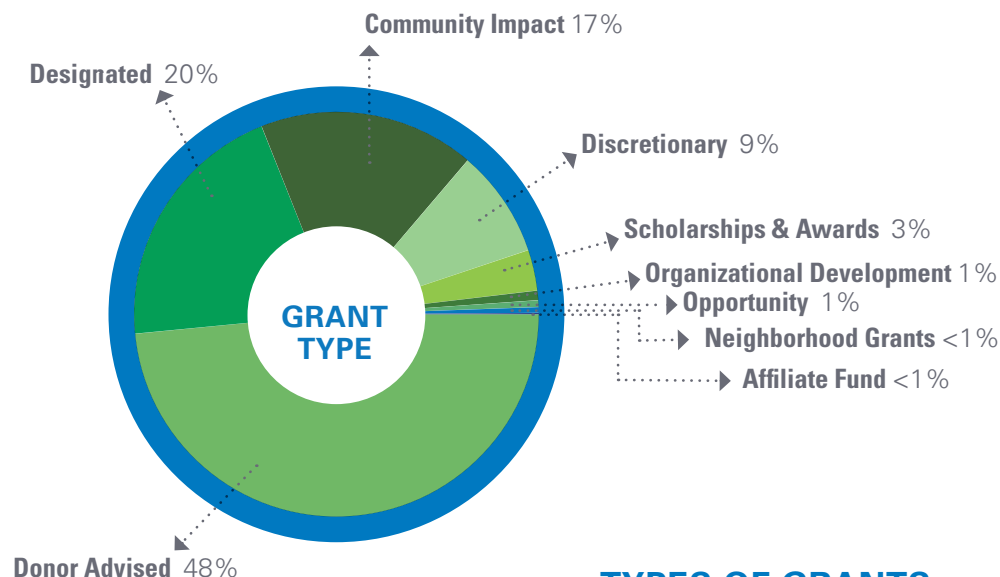
### Financial Stewardship

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

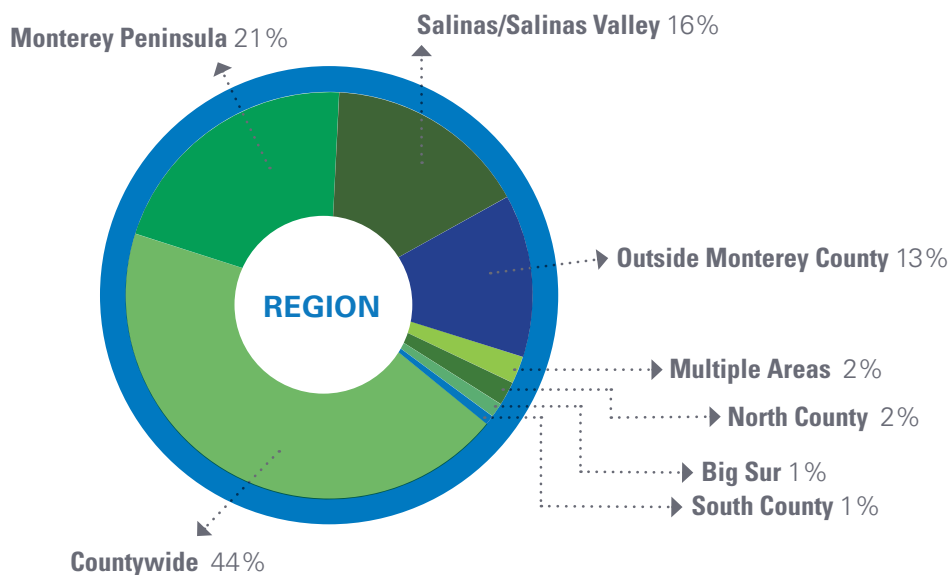
• CFMC Investment Committee Seated (l to r) Craig Johnson, Bill Sharpe, Ken Petersen, Dan Baldwin. Standing (l to r) Steve McGowan, Steve Dart, Ann Westrich (Verus), Bill Doolittle, David Benjamin (not pictured: Ida Lopez Chan, Gail Delorey, Tina Starkey Lopez, Jimmy Panetta)



#### 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



#### GRANTS BY REGION

|                         |             |
|-------------------------|-------------|
| 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

|                                   |                   |
|-----------------------------------|-------------------|
| Contributions*                    | \$16,240,617      |
| Other income                      | 407,025           |
| <b>Total revenues and support</b> | <b>16,647,642</b> |

### INVESTMENT LOSS

(3,530,922)

### GRANTS AND EXPENSES

|                                  |                   |
|----------------------------------|-------------------|
| Grants*                          | 9,343,991         |
| Other operating expenses         | 2,902,370         |
| <b>Total grants and expenses</b> | <b>12,246,361</b> |

### INCREASE IN NET ASSETS

870,359

### NET ASSETS

|                    |                      |
|--------------------|----------------------|
| Beginning of year  | 149,708,295          |
| <b>End of Year</b> | <b>\$150,578,654</b> |

\* 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

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

### LIABILITIES AND NET ASSETS

|   |                      |
|---|----------------------|
| Grants payable  | 1,842,024            |
| Accounts payable and accrued expenses                                       | 90,472               |
| Liabilities under split-interest agreements and charitable remainder trusts | 11,603,349           |
| Funds held for others   | 16,169,699           |
| <b>Total liabilities</b>  | <b>29,705,544</b>    |
| <b>Total net assets</b>   | <b>\$150,578,654</b> |

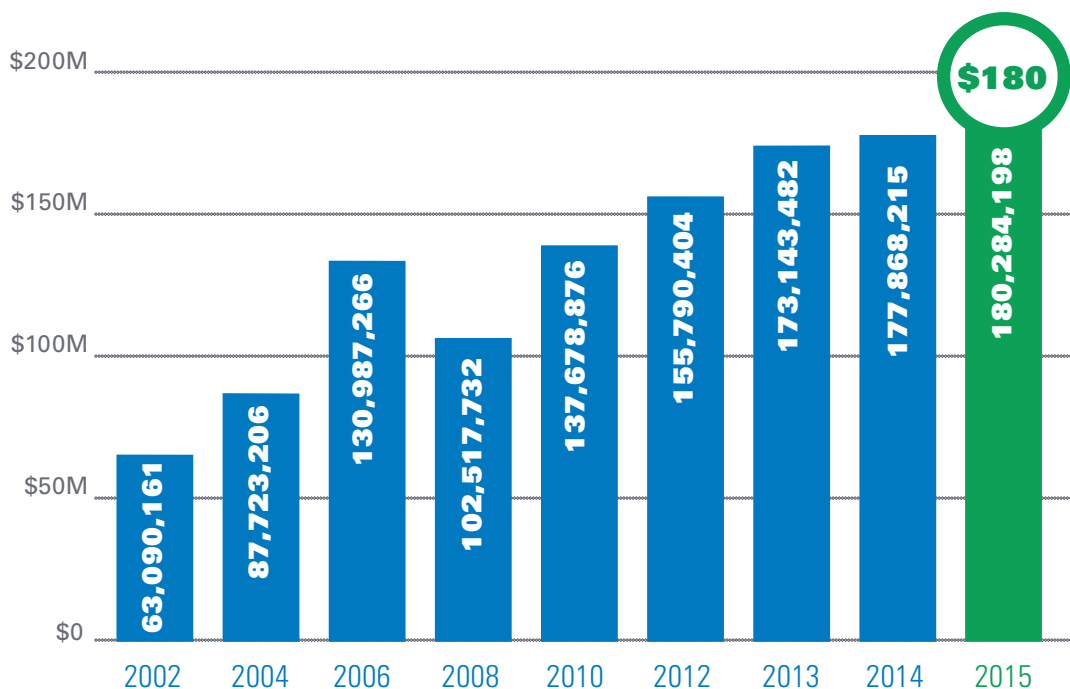


Confirmed in Compliance with National Standards for U.S. Community Foundations  
Member, Council on Foundations League of California Community Foundations

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

## YEAR END TOTAL ASSETS

| Year | Amount (\$) |
|------|-------------|
| 2015 | 180,284,198 |
| 2014 | 177,868,215 |
| 2013 | 173,143,482 |
| 2012 | 155,790,404 |
| 2010 | 137,678,876 |
| 2008 | 102,517,732 |
| 2006 | 130,987,266 |
| 2004 | 87,723,206  |
| 2002 | 63,090,161  |





## BOARD OF DIRECTORS

### Back (l to r):

Jimmy Panetta, Monterey County Deputy District Attorney  
 Steve McGowan, 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 Kobrinsky Evans, Partner, The Kobrinsky Group  
 Stephen Dart, Principal, Dart Family Co. Inc.  
 Rick Kenifer, Attorney at Law, Johnson, Fantl & Kenifer, 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 Benteleb, 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 Aguilera, Administrative Coordinator  
 Phillip Carey, Accounting Manager  
 Eva Holt Rusmore, Girls' Health in Girls' Hands Program Manager

# 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 & Kennifer, LLP; Leslie Finnegan, Noland, Hamerly, Etienne & Hoss; Liza Horvath, Monterey Trust Management; Rick Kennifer, Johnson, Fantl & Kennifer, 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 & Hoss; 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



Dan Baldwin and fund holder Bradley Zeve inspect Tassajara fire damage •



Professional Advisor Council •

• Peace of Mind Dog Rescue





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



• Christine Dawson (l) and Dan Baldwin (r) help Lupe Gomez establish the Trinidad Gomez Family Fund in honor of her late husband

## 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.

#### 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.

#### JOIN US!

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

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



Here for Good

Community Foundation  
for Monterey County

**THANK YOU!**

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

## 2015 HIGHLIGHTS

NEW  
**STRATEGIC**  
Plan

Granted  
**\$9.8**  
**MILLION**

160  
**NONPROFITS**  
**STRENGTHENED**  
through Center for  
Nonprofit Excellence

Created Women's Fund  
**LEADERSHIP**  
& Professional Advisor  
Councils

Received  
**\$18.6**  
**MILLION**  
in gifts



199  
**LEGACY**  
**SOCIETY**  
Members

Monterey County  
Gives!  
**\$3.17**  
**MILLION**

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