



Meeting of the Board of Directors
Tuesday, June 26, 2018 - 3:30 to 5:30 PM
945 S. Main Street Salinas, CA
Agenda

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|---|------|
| 1. Call to Order – Ken Petersen, Board Chair | 3:30 |
| 2. Consent Agenda – Ken Petersen | 3:35 |
| <ul style="list-style-type: none"> • Board Meeting Minutes – April 24, 2018 (1-7) • Executive Committee Minutes – May 22, 2018 (8-11) • Finance Committee Minutes – April 24, 2018 (12-13) • Investment Committee Minutes – May 14, 2018 (14-15) • Grants and Programs Committee Minutes – May 24, 2018 (16-17) • Governance Committee Minutes – May 1, 2018 (18) • Real Estate Committee Minutes – May 3, 2018 (19-20) • Real Estate Resolution – June 13, 2018 (21) | |
| 3. Treasurer / Finance Committee –Teri Belli | 3:40 |
| <ul style="list-style-type: none"> • April 30, 2018 and May 31, 2018 Financials (22-30, 31-39) • 2017 990 Tax Form – Board Portal | |
| 4. Report of the Chair – Ken Petersen | 3:55 |
| <ul style="list-style-type: none"> • Past Chairs Luncheon – June 26, 2018 • LCCF Chair/CEO Retreat - May 10 & 11 • Distinguished Trustee (40-41) | |
| 5. Investment Committee – Steve McGowan | 4:10 |
| <ul style="list-style-type: none"> • Portfolio Update - Board Portal | |
| 6. Community Impact Investment Committee – Dan Baldwin for Nolan Kennedy | 4:15 |
| <ul style="list-style-type: none"> • Status | |
| 7. Resource Development Committee – Betsy Buchalter Adler | 4:20 |
| <ul style="list-style-type: none"> • Development Summary: April and May, 2018 (42-43) • Professional Advisor Council Meeting • Commercial DAF's vs CFMC • DAF Welcome Packets | |
| 8. Governance Committee – Steve McGowan | 4:35 |
| <ul style="list-style-type: none"> • Term Extension for Ken Petersen • Two-Year Board Chair Vote | |

Mission Statement

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

Strategic Priorities

- Community Impact – Invest in developing healthy, safe and vibrant communities across Monterey County
- Philanthropic Leadership – Inspire and facilitate philanthropy throughout Monterey County
- Organizational Excellence – Optimize performance and stewardship for maximum impact

9. Grants and Programs – Birt Johnson, Jr. 4:40
- Grant Approvals: April 1 to May 31, 2018 **(44-61)**
 - Community Impact Grant Recommendations **(62-78)**
 - James Irvine Foundation Grant: Review and Update - Laurel Lee-Alexander

10. New Funds – Dan Baldwin 5:00
- Non-Endowed Donor Advised Fund
 - Richard & Cindy Zoller Silver Family Legacy Fund
 - Neumeier Taylor Foundation Fund
 - David G. Huey & Carla S. Hudson Family Fund
 - McHenry Family Fund
 - Non-Endowed Award
 - American Culinary Federation Monterey Bay Chapter- Marc H. Vedrines Scholarship Fund
 - Endowed Scholarship Fund
 - Whitney Elizabeth Grummon Memorial Scholarship Fund

11. President/CEO Report – Dan Baldwin 5:05
- President's Update – sent electronically
 - Staff Update
 - 2020 Census
 - de Guigne Real Estate Update

12. Executive Session

Adjourn

Next Board Meeting: August 28, 2018 2354 Garden Road, Monterey CA



**Meeting of the Board of Directors
2354 Garden Road, Monterey CA
April 24, 2018**

MINUTES

Board Members Present: Ken Petersen, Birt Johnson, Jr., Jeff Eikenberry, Ida Lopez Chan, Nolan Kennedy, Steve McGowan, Bill Mitchell, Michael Reid, Bill Sharpe, Jan Vanderbilt, Maija West, Ken Wright

On the Phone: Betsy Buchalter Adler,

Absent: Teri Belli, Fred Meurer, Erica Padilla-Chavez, Betsey Pearson, Anna Marie Ponce, Loren Steck, Abby Taylor-Silva

A quorum was established.

Staff: Dan Baldwin, Laurel Lee-Alexander, Christine Dawson, Diane Nonella, Amanda Holder, Julie Conrad

CALL TO ORDER

Board chair Ken Petersen called the regular meeting of the Board of Directors of the Community Foundation for Monterey County to order at 3:30 PM, Tuesday, April 24, 2018 at the Foundation's Monterey office.

Auditor's Report:

Steve McGowan introduced the audit team, Karen Semingson and Kim Said of Hutchinson and Youngblood, LLC. The audit team issued a clean, unmodified opinion for the 2017 audit.

Karen summarized the audit process as:

- A clean unmodified opinion
- 3 adjustments were required:
 - Adjustment to consolidate LLC
 - 3 audit adjustments were prepared by the client after fieldwork began
 - Preliminary net income of \$46,403,280; adjusted net income of \$46,691,919
- Management Letter
 - There were no significant deficiencies or material weaknesses noted.
- Required Communications
 - All required topics were discussed with management and Audit Committee
 - Adoption of ASU 2015-07 Fair Value Measurement as it relates to Level 3 investments
- Upcoming Audit Pronouncements
 - ASU 2016-14 Financial Statements of Not for Profits -replaces the traditional three classes of net assets with only two classes:
 - Those with donor-imposed restrictions and those without
 - Modifies and increases disclosure, including disclosures useful in assessing a nonprofit's liquidity position

Kim Said reviewed a chart comparing the last three years finances through growth in funds, grants awarded and other activities. She also looked at contributions by type and net investment income.

After the presentation by Karen Semington and Kim Said an executive session was called. Upon return the board recommended approval of the 2017 audit.

**Motion: to approve the 2017 Audit Report as presented.
Steve McGowan / Nolan Kennedy second. Motion carried unanimously.**

CONSENT AGENDA – Ken Petersen

Ken Petersen asked the board if they had any questions or required clarification on matters related to the consent agenda. There were no questions or concerns.

- Board Meeting Minutes - February 27, 2018 **(1-4)**
- Executive Committee Minutes - March 27, 2018 **(5-8)**
- Finance Committee Minutes - February 27, 2018 **(9-10)**
- Audit Committee Minutes – April 18, 2018 **(11-12)**
- Resource Development Committee Minutes – March 12, 2018 **(13-14)**
- Community Impact Investment Committee Minutes – March 14, 2018 **15-16)**
- Community Impact Investment Committee Minutes – April 19, 2018 **(on portal)**

**Motion: to approve the Consent Agenda as presented.
Ida Lopez Chan / Birt Johnson, Jr., second. Motion carried unanimously.**

REPORT OF THE CHAIR – Ken Petersen

Ken Petersen reported on Women's Fund Luncheon held April 3, 2018 at the Hyatt Hotel. He thanked the board for attending and noted there were many positive comments from attendees. The event was well organized and the speakers were successful in delivering a strong message about the impact of the GHGH scholarship fund. The event netted \$95,000 and 61 GHGH scholarships were awarded shortly after the event.

Ken described the importance of 100% board giving and reminded each board member of their responsibility to make an annual financial contribution to the Foundation according to their personal means. It is mandatory we have 100% annual board giving in order to meet the grant requirements of some third-party funders.

**Motion: to approve a resolution for 2018 for 100% financial participation by the CFMC board.
Ken Wright / Bill Sharpe second. Motion carried unanimously.**

de Guigne Real Estate Gift Update – Dan Baldwin and Attorney, Rick Kennifer

Dan Baldwin summarized the de Guigne real estate gift and how the process has gone to date. The CFMC has not yet received title to the property, but is proactively getting the Environmental Phase One, Historic Preservation and Opportunities and Constraints reports completed before the property goes on the market. Dan introduced attorney Rick Kennifer from Johnson, Fantl and Kennifer (JF&K) to update the committee on the transition of the distribution of the assets.

Rick reviewed the administration of the trust and estate of Mr. de Guigne and the ongoing negotiations with the trustee, Wells Fargo, and their legal counsel. Well Fargo submitted a proposal on March 16, 2018 which the legal team from JF&K found unacceptable. JF&K countered with an alternative proposal on March 23, 2018. Currently, JF&K is trying to set up a meeting with Wells Fargo counsel to clarify the actions they have taken, some of which may go against the trust instructions and could result in a significant tax implication. There is a probate court date set for July 18, 2018 to get the courts approval of the trustees proposed actions.

Rick reported there are potential delays in the transfer of the title and distribution of funds to the beneficiaries. The board discussed different approaches CFMC might take to the Wells Fargo counsel which will be considered at a meeting of the Real Estate committee next week.

INVESTMENT COMMITTEE – Steve McGowan

Steve McGowan reviewed the market value of the Long-Term fund, Medium-Term fund, and the ESG fund and overviews for the period ending 3/31/18. He summarized the year-to-date portfolio returns.

At the next Investment Committee meeting, on May 14, the committee will review asset allocations for Community Impact Investing.

COMMUNITY IMPACT INVESTING – Nolan Kennedy

Nolan Kennedy reported that the committee met to discuss next steps to allocate CFMC funds to invest in mission-related community projects while achieving a market rate return on the invested funds.

The committee has prepared three documents to recommend for approval: The Community Impact Investment Policy Statement, Addendum to CFMC's Investment Policy Statement and Community Impact Investment Committee Description. There was a mistake in the board packet and the current version of the documents revised and approved by the Community Impact Investment and Executive Committees was not in the packet. The board will be emailed the correct documents for a vote on April 25, 2018.

Board Action: April 25, 2018 Update:

Dan Baldwin sent the corrected Impact Investment Committee documents (April 2, 2018) that consist of: 1. Community Impact Investment Committee description, 2. Community Impact Policy Statement, and 3. an addendum to the Investment Policy Statement approved April 24, 2012 that allows for impact investments as a new asset allocation.

Board Action: April 27, 2018 Outcome: there was a majority vote of approval of the 1. Community Impact Investment Committee description, 2. Community Impact Policy Statement, and 3. the an addendum to the Investment Policy Statement approved April 24, 2012.

A copy of the corrected documents and vote results is attached to these minutes.

RESOURCE DEVELOPMENT – Call-in, Betsy Buchalter Adler

Betsy Buchalter Adler and Christine Dawson reported on the February and March Resource Development Summaries.

Christine Dawson distributed the 2018 Goals of the Philanthropic Services Department and Resource Development Committee.

TREASURER/FINANCE COMMITTEE – Dan Baldwin for Teri Belli

Dan Baldwin reviewed the notes to the financial statements for February and March 2018. He highlighted the line items where the impact of the Monterey County Gives campaign appears and explained the variances that occur in the first quarter of each year in the statements.

Motion: to approve the February 28, 2018 and Financial Statement.

Jeff Eikenberry / Birt Johnson, Jr., second. Motion carried unanimously.

Motion: to approve the March 31, 2018 and Financial Statement.

Bill Mitchell/ Birt Johnson, Jr., second. Motion carried unanimously.

GRANTS AND PROGRAMS – Birt Johnson, Jr.

Birt Johnson, Jr. requested approval of the February 1 - March 31, 2018 grants. There are 313 grants totaling \$6,289,416.

Motion: to approve 313 grants awarded from February 1 through March 31, 2018, totaling \$6,289,416.

Birt asked for approval of two grants over \$50,000 not on the agenda.

1. Colburn and Alana Jones Foundation
Agency: University of Arizona
Amount: \$50,000
Purpose: UACIM Integrative Mental Health Conference
2. Fund: The Harles R. Sarment College Endowment
Recipient Fund: College Futures Monterey County Fund
Amount: \$105,000
Purpose: 2018 College Futures Monterey County scholarships

**Motion: to approve the Colburn and Alana Jones Foundation grant for \$50,000 and the Harles R. Sarment College Endowment grant for \$105,000.
Bill Sharpe / Ken Wright, second. Motion carried unanimously.**

Laurel Lee-Alexander informed the board that the James Irvine Foundation has granted the CFMC \$1,250,000 for the “pilot regrating and capacity building program that will strengthen local nonprofit capacity and leadership in the areas of civic engagement and youth leadership as a means to expand economic and political opportunity for low-income residents in Salinas.” An advisory committee has been created to help put the structure together for the program.

NEW FUNDS – Dan Baldwin

- Awards Fund
 - Taylor Farm’s Scholarship Award Fund
- Non-Endowed Donor Advised Fund
 - California Rodeo Salinas Fund
- Non-Endowed Special Purpose and Designated Fund
 - Animal Welfare Assistance Group (AWAG)
- Scholarship Funds
 - Nan Borrenson and Fred Terman Scholarship Fund
 - College Futures Monterey County Fund
 - Steven Schmidt Endowed Scholarship Fund for King City High School
- Stewardship Fund
 - Maury Richmond Scholarship Stewardship Fund
- Special Program Fund
 - The James Irvine Foundation Salinas Leadership Fund

PRESIDENT’S REPORT – Dan Baldwin

Dan sent an electronic report to the board prior to the meeting.

The board went into Executive Session at 5:20 PM.

ADJOURN

The next board meeting June 26, 2018 3:30 - 5:30 in the Salinas office.

Minutes prepared by: _____
Julie Conrad Administrative Services Manager

Approved by: _____
Jeff Eikenberry, Secretary of the Board of Directors

Community Foundation for Monterey County
Addendum to Investment Policy Statement Approved April 24, 2012

Community Impact Investments

This addendum adds Community Impact Investments as an asset class in the Community Foundation for Monterey County's Investment Policy Statement. This addendum allows an allocation for Community Impact Investments within a range of 0 – 3%, and a target allocation of 2%. Decisions for placing Community Impact Investments will be overseen by the Community Impact Investment Committee. Returns will be shown on the monthly and quarterly reports produced by the CFMC's investment consultant, and reviewed by the CFMC's Investment Committee. While there is no standard benchmark, return expectations will be established by the CIIC. It is understood that the CIIC will monitor the social impact created by the investments.

May 14th , 2018

Community Impact Investment Policy Statement

The Community Foundation for Monterey County (CFMC) seeks to utilize a portion of its investment portfolio in a manner that creates local impact. Local placements from the portfolio can support overall returns and create impacts consistent with the CFMC's mission (To inspire philanthropy and be a catalyst for sustaining communities throughout Monterey County.). The CFMC's program will be called Community Impact Investments. The investments must benefit Monterey County.

Impact investing is not new to philanthropy. Many private and community foundations are utilizing impact investments in various forms. Impact investments are not grants. They are placements of capital intended to bring market or near-market returns. Impact investments can range from the very simple (buying CDs at local credit unions) to the complex (investing directly in social enterprises). The CFMC seeks a middle ground of complexity by placing capital with intermediaries such as Community Development Financial Institutions (CDFIs) or like institutions. This strategy allows the CFMC to utilize expertise currently residing in the intermediaries. For example, rather than directly making loans to start-up farmers or women entrepreneurs, the CFMC's Community Impact Investment program will place capital with experienced organizations that work directly with the recipients of the funds. As the CFMC's Community Impact Investment program grows, it may choose to venture into more complex investments; should that occur, this policy statement will be amended to allow for such activity.

Capital for the CFMC's Community Impact Investments will come from the general portfolio. The CFMC's Investment Policy Statement (IPS) will be amended to allow for a new asset class: Community Impact Investments. The IPS will reflect an allocation range for Community Impact Investments of 0 – 3%, with a target allocation of 2%. Once approved, the CFMC may take up to three years to meet the target allocation.

No one investment will exceed 50% of the target allocation. Should the CFMC co-invest with another funder, it is only the CFMC's investment that counts toward the limit of 50% of the target allocation.

As Community Impact Investment placements are made, it will be important to consider the duration of each investment, allowing for flexibility to changing economic circumstances and the potential for liquidity.

It is understood that donor advisors may want to utilize their funds for Community Impact Investments.

The Community Impact Investment Committee will define what returns are deemed acceptable, considering the type of investment and how the investment is meeting a need in Monterey County. Investment return on the CFMC's impact investments will be monitored by the CFMC's Investment Committee, and returns will be included in the investment consultant's monthly and quarterly reports.

May 14th, 2018

Community Impact Investment Committee Description

Oversight of the CFMC's Community Impact Investments will be performed by the Community Impact Investment Committee. The committee will be comprised 3 – 7 members. The chair must be a CFMC board member, and a majority of the committee will be comprised of CFMC board members. The chair will sit on the CFMC's Investment Committee. Staff will support the work of the committee.

The role of the Community Impact Investment Committee will be to:

- Develop a Community Impact Investment Policy Statement that can be recommended to the CFMC board of directors for approval;
- Develop and implement a process for identifying and placing investments;
- Develop and implement a process for determining the terms, conditions, and expected outcomes of each investment, including reporting by any intermediaries to which placements have been made;
- Develop and implement a process for monitoring the success of individual placements, not limited to investment return (e.g. alignment with the CFMC's mission). Investment impact can include reports on the number of jobs created, businesses started or housing units built
- Provide reports to the CFMC's Board of Directors and Investment Committee; and,
- Create a description of duties for the CFMC's finance department to utilize in working with and reporting on Community Impact Investments, including how impact investments interact with the CFMC's annual audit.

May 14th, 2018



**Executive Committee Meeting
2354 Garden Road Monterey, CA
May 22, 2018**

MINUTES

Committee Members Present: Birt Johnson, Jr., Teri Belli

Call in - Ken Petersen, Betsy Buchalter Adler

Absent: Jeff Eikenberry, Nolan Kennedy, Steve McGowan

Guest Speaker: Rick Kennifer

A quorum was established.

CFMC Staff Present: Dan Baldwin, Christine Dawson, Laurel Lee-Alexander, Diane Nonella, Julie Conrad

CALL TO ORDER – Birt Johnson, Jr. for Ken Petersen

Birt Johnson, Jr. called the regular meeting of the Executive Committee of the Community Foundation for Monterey County to order at 3:33 on May 22, 2018 at the Foundation's Monterey office.

APPROVAL OF MINUTES

Motion: to approve the March 27, 2018 minutes:

Teri Belli / Betsy Buchalter Adler second. Motion carried unanimously.

de Guigne Real Estate Update

Birt Johnson introduced attorney Rick Kennifer from Johnson, Fantl and Kennifer (JF&K) to update the committee on the Charles de Guigne real estate gift.

Rick Kennifer passed out the edited version of the proposal submitted to Wells Fargo on March 23, 2018. The memo will be presented on May 25, 2018, to the Wells Fargo legal counsel to discuss and finalize the proposed plan. There are 4 items to finalize:

- 1) Wells Fargo will "immediately" transfer title to the Pebble Beach property to the Community Foundation.
- 2) The Community Foundation will "immediately" transfer to Wells Fargo sufficient funds to enable Wells Fargo to pay all of the specific beneficiaries in full. Upon receipt of those funds (in the amount of \$4,155,104), Wells Fargo will immediately pay all of the remaining specific bequests to all beneficiaries.
- 3) Assuming the Monterey County Probate Court rules as expected on July 18, 2018, and admits Charles' Will to probate, Wells Fargo will "immediately" thereafter transfer to the Community Foundation the sum of \$2,100,000, or the "net distributable assets" from the Generation Skipping Trust (GST), retaining a small reserve (\$26,565).
- 4) For future discussion/legal action: Wells Fargo will retain, for an undetermined period of time, a reserve in the amount of \$1,000,000 in the "2009 Trust" accounts, plus an additional amount of \$200,000 as a reserve for future attorneys' fees, plus \$240,000 for property tax and property maintenance (related to the Pebble Beach property), plus other incidental amounts in the approximate amount of \$45,000.

Rick and the Executive Committee discussed the details of the edited proposal at length and agreed that the proposal from JF&K is in the best interest of CFMC. The Committee agreed to authorize CFMC to advance sufficient funds, not to exceed \$4,200,000 to enable Wells Fargo to pay all the specific beneficiaries in full, contingent on the immediate transfer of title to the property and remaining assets to the CFMC.

Motion: to approve Community Foundation for Monterey County advance up to \$4.2 million to Wells Fargo Bank for the payment of all beneficiaries as stated in the Charles de Guigne Trust. The advance is contingent upon transfer of title to the Community Foundation for Monterey County of 3200 17 Mile Drive and a satisfactory agreement from Wells Fargo on the expedient transfer of assets from the de Guigne Generation Skipping Trust after the July 18, 2018 court hearing.

Ken Petersen / Betsy Buchalter Adler second. Motion passed unanimously.

REPORT OF THE CHAIR – Birt Johnson, Jr. for Ken Petersen

Birt Johnson reviewed the Distinguished Trustee process and list of recipients. The committee discussed the list, and at the end of the discussion the committee agreed on the first and second choices to recommend to the board.

Motion: to recommend to the full board at the June 26, 2018 meeting, to honor Leon and Silva Panetta or Lydia Villareal as the 2018 Distinguished Trustee at the 2018 Celebration of Philanthropy.

Teri Belli / Betsy Buchalter Adler second. Motion carried unanimously.

INVESTMENT COMMITTEE – Dan Baldwin for Steve McGowan

Dan Baldwin reported the Investment Committee discussed Community Impact Investing (CII) at the May 14 meeting.

The committee discussed the asset allocation range to be used for the CII project. The committee agreed on a safer approach of 0-3% allocation range instead of the proposed 0-5%.

Motion: To e recommend a 0-3% asset allocation range for Community Impact Investing and forward the recommendation for a vote to the full board at the June 26, 2018 meeting.

Teri Belli / Ken Petersen second. Motion carried unanimously.

RESOURCE DEVELOPMENT COMMITTEE - Betsy Buchalter Adler

Christine Dawson highlighted the activities in the first quarter. She described the upcoming CPE forum and Professional Advisory Council meeting coming up in June.

The CFMC received the first fund which applies the Donor Recommended Investment Management (DRIM) policy for \$3,000,000.

TREASURERS REPORT-Teri Belli

Teri Belli reported the April 30, 2018 financials will be approved at the June board meeting.

GRANTS AND PROGRAMS COMMITTEE – Birt Johnson, Jr.

Birt Johnson reported there are five grants over \$50,000 for approval.

Donor Advised of \$50,000 or more:

1. Fund: The David and Lucile Packard Foundation
Agency: CHISPA
Amount: \$65,000

Purpose: 2018-2019 Salinas Youth Initiative: \$55,000 for program and small capital and \$10,000 for technical assistance

2. Fund: The David and Lucile Packard Foundation
Agency: Restorative Justice Partners
Amount: \$52,475
Purpose: 2018-2019 Salinas Youth Initiative: \$40,000 for program and small capital and \$12,475 for technical assistance
3. Fund: The David and Lucile Packard Foundation
Agency: City of Salinas
Amount: \$55,000
Purpose: 2018-2019 Salinas Youth Initiative: for the Salinas Public Library for \$55,000 for program and small capital
4. Fund: Farrell/Allen/LaSalle Carmel Rotary Fund
Agency: The Rotary Club of Carmel-by-the-Sea Foundation
Amount: \$130,000
Purpose: to fund the newly created Rotary Club of Carmel-by-the-Sea Foundation; represents scholarships budgeted for Rotary year 2016-17 totaling \$60,000 and for Rotary year 2017-18 totaling \$70,000
5. Fund: The Katherine Curtis Springer Fund
Agency: Salinas Valley Memorial Hospital Foundation
Amount: Up to \$77,250 (remaining available amount to award from the non-endowed fund) to provide medical care and treatment for patients diagnosed with Fibromyalgia, Chronic Fatigue Syndrome or Gulf War illnesses.
Purpose: Services for people diagnosed with Chronic Fatigue Syndrome
Other: Grant term: June 1, 2018 – May 31, 2019. Reporting requirements: Annual with an informal mid-year update

Motion: to approve the four Donor Advised grants from David and Lucile Packard Foundation (3), Farrell/Allen/LaSalle Carmel Rotary Fund (1), totaling \$302,425. Teri Belli /Ken Petersen second. Motion carried unanimously.

Motion: to approve the Katherine Curtis Springer Fund grant for up to \$77,250 to the Salinas Valley Memorial Hospital Foundation.

Ken Petersen /Betsy Buchalter Adler second. Motion carried unanimously.

Birt noted the next Grants and Programs meeting is on May 24 to finalize Community Impact grant applications for the Spring cycle.

GOVERNANCE COMMITTEE – Dan Baldwin for Steve McGowan

Dan Baldwin reported the Governance Committee created a 2018 workplan and will continue the nominating process for 2019 board members in late June.

NEW FUND APPROVALS – Dan Baldwin

Dan Baldwin reported on the new funds approved since the last meeting.

- Non-Endowed Donor Advised Fund
 - Richard & Cindy Zoller Silver Family Legacy Fund
 - Neumeier Taylor Foundation Fund
- Non-Endowed Award

- American Culinary Federation Monterey Bay Chapter-
Marc H. Vedrines Scholarship Fund
- Endowed Scholarship Fund
 - Whitney Elizabeth Grummon Memorial Scholarship Fund

PRESIDENTS/CEO REPORT - Dan Baldwin

Real Estate Committee Update

Dan reported on the outcome of the completed Environmental Phase One, Historic Preservation and Opportunities and Constraints reports for the Charles de Guigne property. CFMC is still waiting on results to be finalized by Subtronics Company on the existence of underground storage tanks.

The Real Estate Committee is discussing the purchase of water credits with Pebble Beach Company which will allow the property to be split into two lots. Once the title has been transferred from Wells Fargo to the CFMC, the committee will move forward with plans to market the property for sale.

2020 Census

The League of CA. Community Foundations has voted make the 2020 Census a priority initiative. Community Foundations throughout the state will provide leadership and facilitation with the California Census campaign. The CFMC will co-host an information session May 31 in Salinas. CFMC is committed to a leadership position until the census is complete.

EXECUTIVE SESSION

Meeting adjourned at 5:00

Next Executive Committee Meeting is:

- **Tuesday, July 24, 2018 in the Salinas Office**

Minutes prepared by _____
Julie Conrad, Administrative Services Manager

Approved by: _____
Johnson, Jr., Vice Chair

Birt



**Finance Committee Minutes
April 24, 2018**

Present: Jeff Eikenberry, Ken Petersen, Jan Vanderbilt and Ken Wright
Absent: Terri, Belli and Fred Meurer
Staff: Dan Baldwin, Phil Carey and Diane Nonella

The meeting of the Finance Committee of the Community Foundation for Monterey County was called to order by Dan Baldwin at 2:05 PM on April 24, 2018.

Minutes

Dan Baldwin asked if there were any changes/corrections to the February 27, 2018 minutes. Hearing none, the minutes will stand as written.

Financial Statement Review

Dan reviewed the February Financial Statement, highlighting the significant changes in market returns, gifts and grants.

On a motion by Jan Vanderbilt, seconded by Ken Petersen, the committee recommended board approval for the February 2018 Financial Statements.

Dan then reviewed the March Financial Statement and the operating fund budget vs. actual. There was a discussion on how the de Guigne expenses were being recorded and their affects on the financial statements.

On a motion by Jeff Eikenberry, seconded by Ken Wright, the committee recommended board approval for the March Financial Statements.

Discussion Items

Dan presented the Growth at a Glance and highlighted the significant changes. He also stated that the beginning of the year in always slow in gifts and the grant increase was due to MC Gives exceeding their totals from 2017.

Diane Nonella reviewed the journal entries for the de Guigne real estate transaction. She also provided an example of what the journal entries would look like upon the sale of the real estate and explained how the sale would affect the financial statements.

2018 Meetings

Tuesday, June 26, 2018, 2:00
Tuesday, August 28, 2018, 2:00PM
Tuesday, October 23, 2018, 2:00PM
November budget meeting TBD
Tuesday, December 18, 2018, 2:00PM

Having no further business, the meeting was adjourned at 3:15 PM

Minutes prepared by:

Phillip Carey, Accounting Manager

Approved by:

Teri Belli, Committee Chair



Investment Committee Minutes May 14, 2018

Present: Steve McGowan, Committee Chair, Teri Belli, David Benjamin, Stephen Dart, Craig Johnson, Nolan Kennedy, Ken Petersen, Bill Sharpe and Loren Steck

Absent: Bill Doolittle and Jeff Eikenberry

Staff: Dan Baldwin, Phil Carey, Christine Dawson and Diane Nonella

Also Attending: Anne Westreich, Verus

The regular meeting of the Investment Committee (IC) of the Community Foundation for Monterey County was called to order by Steve McGowan at 3:00 PM on May 14, 2018.

Minutes

On a motion by Ken Petersen, seconded by Teri Belli, the February 12, 2018 minutes were approved as written.

Community Impact Investing

Dan Baldwin updated the committee on the progress by the Community Impact Investment Committee (CII). Dan reviewed the types of investments, the roles of the IC and CII and the CII policy statement. There was a discussion by the committee on the investment returns (rate of return and social impact), reporting by Verus and their fiduciary responsibility. At the conclusion of the discussion on a motion by Bill Sharpe, seconded by Loren Steck, the voting members of the committee approved the amended Investment Policy Statement, but with a CII range of 0-3% versus 0-5%.

Donor Recommended Investment Manager Policy

Dan then reviewed the Donor Recommended Investment Manager Policy (DRIM) that was approved by the board in August 2013. He then stated that the foundation was in the process of establishing their first DRIM. There was a discussion by the committee regarding the policy. Anne Westreich provided a sample of how the DRIM's investment returns would be reported to the foundation. It was noted that the DRIM was being established by a Professional Investment Manager with 32 years of experience, and they would not be charging advisory fees. After discussion on a motion by Ken Petersen, seconded by Teri Belli, the voting members of the committee approved two policy exceptions for the Neumeier Taylor Foundation Fund DRIM (#1 - Donor must represent that the DRIM is not a related party and #2 – Total fee calculation - advisory fees).

Verus

Anne Westreich reviewed the first quarter 2018 investment results.

The market value of the Total Fund portfolio at 3/31/2018 was \$187,772,416. The YTD returns were -0.2% compared to the policy benchmark of -0.6%.

The market value of the Medium-Term portfolio at 3/31/2018 was \$4,658,784. The YTD returns were -0.6% compared to the policy benchmark of -1.1%.

The market value of the ESG portfolio at 3/31/2018 was \$2,986,789. The YTD returns were -0.6% compared to the policy benchmark of -1.1%.

Anne then reviewed the proposed changes to the Investment Policy Statement. She made recommendations on changing several benchmarks for the Medium & Long Term Performance Objectives. There was a discussion and the committee asked that the CII benchmark be changed from No Standard Benchmark to TBD by the CII Committee. Anne then reviewed the current Target Asset Allocation. The committee discussed the proposed changes and questioned the reason behind changing the Target Allocations versus rebalancing to current targets. After discussion on a motion by Bill Sharpe, seconded by Loren Steck, the voting members of the committee agreed to maintain status quo until the committee had worked through their questions on the Target Asset Allocation and rebalancing the portfolio.

2018 meeting dates:

Monday, August 13, 2018, 3:00 – 5:00PM

Monday, November 12, 2018, 3:00 - 5:30PM

Having no further business, the meeting was adjourned by Steve McGowan at 5:05 PM.

Minutes prepared by

Phillip Carey, Accounting Manager

Approved by

Steve McGowan, Investment Committee Chair



Grants and Programs Committee Minutes of the May 24, 2018 Meeting

Committee Members Present: Birt Johnson, Chair; Ida Lopez Chan, Vice Chair; Bill Mitchell and Ken Wright

Excused: Abby Taylor-Silva, Anna Marie Ponce

CFMC Staff Members Present: Laurel Lee-Alexander, VP of Grants and Programs; Janet Shing, Erika Matadamas, and Josh Warburg

Call to Order: The regular meeting of the Grants and Programs Committee of the Community Foundation for Monterey County (CFMC) was called to order at 9:00 AM by Birt Johnson at the CFMC's Salinas office. Birt reviewed the 2018 meeting schedule and committee composition.

Approval of the February 7, 2018 minutes: Motion: Ida Lopez Chan/second: Ken Wright; motion carried.

Updates:

1. Neighborhood Grants Program (NGP)

Erika Matadamas presented an update of the program, including results of the program changes made for the 2018 cycle. Highlights include:

- Grant applicants overwhelmingly prefer to have individual meetings or calls instead of the Applicant Assemblies.
- Grantees expressed appreciation at the expedited grant application and approval process, including the discontinuation of the Applicant Assemblies. The discontinuation of the Awards Ceremony was also welcomed due to inconvenience of attending the event and waiting for the event to receive the grant check.
- Ken Wright, Board liaison participated in the applicant site visits and worked with Erika on determining recommendations for grants. He agreed the changes have improved the program changes and suggested including a Board member as a liaison for the program.
- The G&P team plans to continue program enhancements for future grant cycles.

2. Community Impact (Spring Cycle)

Janet Shing, Director of Grantmaking, gave an update on the 2018 Spring Community Impact Grants program.

- CFMC received a total of 82 applications this spring (43 Children & Youth and 39 Health & Human Services), similar to the 83-86 received in recent years.
- Earlier this month, Dan approved 10 Small CI grants \$12,000 or less (7 CY, 3 HHS).
- Yesterday, sub-committee #2 recommended 24 grants (with an average size of \$24,000) and six denials. Sub-committee #1 meets later today.

3. James Irvine Foundation Re-granting Project

Laurel Lee-Alexander shared a presentation of the recently announced grant to the CFMC from The James Irvine Foundation. The grant is for \$1.25 million over 18 months to support resident engagement and leadership development in Salinas through a pilot regranting partnership and is being led by Laurel and Kaki Rusmore, Director of the CNE. \$1M will be allocated to expand economic and political opportunity for low-income residents in Salinas; specifically to strengthen local nonprofit capacity and leadership in the areas of civic engagement and youth leadership. The first step is to identify effective strategies and gaps in community-led efforts in Salinas through a community assessment. \$250K will be allocated for program/operating support for the project. The CFMC is currently in Phase I: community assessment and is working with an advisory committee of local funders, nonprofits engaged in community development in Salinas, the City of Salinas and others.

Adjournment: The meeting was adjourned by Birt Johnson at 10:15 AM.

*Minutes prepared by Laurel Lee-Alexander
Approved by Birt Johnson, Presiding*



CFMC Governance Committee
May 1, 2018, 4 pm
Minutes

Attending: Ken Petersen, Birt Johnson, Maija West, Dan Baldwin
Absent: Fred Meurer, Steve McGowan, Ken Wright

In the absence of committee chair Steve McGowan, Dan Baldwin called the meeting to order at 4:10 pm. Dan reviewed the Governance Committee duties. He then outlined the year's meeting schedule, and what generally occurs at each meeting. The committee then reviewed what was in store for 2018, including number of potential additions to the board during the year-end nominating process.

The committee discussed the uneven nature of board classes. Three board classes in succession rotate 6 board members, while three others in succession rotate 14. The feeling is that a strategy should be developed to even out the board classes so that large numbers of board members aren't terming off at the same time, making continuity challenging.

The committee discussed extending Ken Petersen's term by one year (to 2019) so he can serve as past chair. On a motion by Birt Johnson and a second by Maija West, the committee voted to recommend an extension of Ken's term to the board of directors.

The committee discussed reinstating a practice of board chairs serving two years. The CFMC is very unusual in the field in that it has one-year chairs. The committee feels that two-year chairs provides more continuity of leadership. It was decided that this was a good time to reinstate this practice. On a motion by Maija West and a second by Ken Petersen, the committee voted to recommend moving to two-year chairs.

The committee had a discussion on how to handle communication with board members who have a low percentage of attendance at board meetings. It was decided to approach conversations through asking what barriers are keeping them from good attendance, rather than approach the conversation as punitive.

Dan then gave a summary of the nominating process. There was a general discussion about the ability to remote in board members and the available technology to do so in a quality manner.

With no further business, the meeting was adjourned at 5:10.



**COMMUNITY FOUNDATION FOR MONTEREY COUNTY
REAL ESTATE COMMITTEE NOTES
May 3, 2018**

- Present:** Nolan Kennedy, John Mahoney, Bill Mitchell and Ken Petersen
- Absent:** Greg Chilton and Steve McGowan
- Staff:** Dan Baldwin, Phil Carey and Diane Nonella
- Counsel:** Jim Heisinger, Heisinger, Buck & Morris
Rick Kennifer, Johnson, Fanlftl & Kennifer
- Guest:** Michael Groves, EMC Planning Group Inc.
Polaris Kinison Brown, EMC Planning Group Inc.
Andrea Edwards , EMC Planning Group Inc.

Dan Baldwin started the meeting with an agenda overview - #1 Presentation by EMC Planning Group, Inc., #2 Potential Marketing, #3 update by Rick Kennifer. Dan then passed the meeting to Michael Groves and Polaris Kinison Brown of EMC Planning Group Inc.

Michael and Polaris presented their initial findings for 3200 17 Mile Drive's Opportunities and Constraints report. They reviewed the property features, 2 APN numbers with separate addresses (3200 - existing structures built in 1930/1950/1980 and 3204 - a vacant lot), the residential water fixture count survey, and Phase II findings by Subtronic. It was noted that the archeological findings were minimal.

There was a discussion on the existing water credits, the limitations of transferring part of the credits to the vacant lot and purchasing water credits from the Pebble Beach Company. It was concluded that Jim Heisinger would start the process of purchasing 4 allotments of 10 Units of water from the Pebble Beach Company.

Michael discussed the application process with the county for the Certificate of Compliance for each legal parcel of land and that the approval would take approximately 3 months. It was decided that Michael would proceed with the application and Jim would write the attorney opinion letter needed with the application.

Michael then reviewed the Phase II findings and it was decided to contract with Subtronic for further investigation for two sites for the possible underground storage tank.

Andrea Edwards then presented the biological findings and identified potential building sites. Due to existing Cypress trees, the buyer(s) would need to have easement rights for part the existing driveway. It was decided that Jim would work on the easement.

Dan then talked about the timeline for the marketing of the property. Bill Mitchell agreed to send Dan an example of an RFP. It was also noted that the property location has a name (Sunset Point) and that Sunset Point will be key in marketing the property.

Rick Kennifer then reviewed the progress of the distribution of the estate and the title transfer. He then reviewed the law regarding statutory interest at 7% for specific bequests not distributed within one year following the date of Charles' death (on August 9, 2017). He informed us that Wells Fargo Bank (WFB) had filed a petition for probate and the hearing will be on July 18, 2018. He also told us that WFB had send a letter regarding the settlement of the estate. After review of the letter it was decided to propose an alternative approach so that the distribution could occur prior to August 9, 2018. Rick will follow up with a letter to WFB with a proposal for distributing the assets to the beneficiaries for Dan to review.

Bill Mitchell discussed the idea of getting a second opinion on the buildable area. Jim also agreed that a second opinion or a peer review would be a good idea. They have both worked with Denise Duffy and suggested that we contract with her to perform the peer review. It was decided that Jim would contract with Denise to do a peer review once we have received the final report from EMC Consulting, Inc.

BOARD OF DIRECTORS

Ken Petersen
Chair

Birt Johnson, Jr.
Vice Chair

Teri Belli, CPA
Treasurer

Jeff Eikenberry
Secretary

Betsy Buchalter Adler

Ida Lopez Chan

Nolan Kennedy

Steve McGowan

Fred Meurer

Bill Mitchell

Erica Padilla-Chavez

Betsey Pearson

Anna Marie Ponce

Michael Reid

Bill Sharpe

Loren Steck

Abby Taylor-Silva

Jan Vanderbilt

Maija West

Kenneth Wright

Daniel R. Baldwin
President/CEO

**CERTIFIED COPY OF A RESOLUTION OF THE
EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS OF
COMMUNITY FOUNDATION FOR MONTEREY COUNTY**

I, Ken Petersen, Board Chair of Community Foundation for Monterey County, a Corporation organized under the laws of the State of California, do hereby state that the following is a true, full and correct copy of a resolution duly adopted by the Executive Committee of Board of Directors of said corporation by electronic vote in June 2018.

“RESOLVED that Daniel R. Baldwin, President/CEO is hereby authorized and directed to transact, negotiate and enter into any and all real estate transactions by or in the name of this corporation and in connection therewith to execute and deliver, in the name of the corporation Deeds, Mortgages/Deeds of Trust, Notes, Agreements for Sale, Escrow Instructions and any and all instruments necessary to properly consummate such transactions in accordance with the purpose of this resolution.”

AND I DO FURTHER CERTIFY that said resolution has not been amended, modified or rescinded and that it is still in full force and effect.

The Officers of the Corporation are:

Ken Petersen, Chair
Birt Johnson, Jr., Vice Chair
Teri Belli, CPA, Treasurer
Jeffrey Eikenberry, Secretary

WITNESS my hand and seal of the Corporation, this 13th day of June 2018.

Ken Petersen, Chair



Confirmed in Compliance
with National Standards for
U.S. Community Foundations

Member, League of California
Community Foundations



Here for Good

Community Foundation

for Monterey County

FINANCIAL STATEMENT

For the Four Months Ended April 30, 2018

**COMMUNITY FOUNDATION FOR MONTEREY COUNTY
FINANCIAL REPORTS
For the Four Months Ended April 30, 2018**

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Assets

Total Assets through 4/30/2018 are **\$262,357,645** a **22.21%** increase since April 2017, and a **1.89%** decrease since December 2017.

Charitable Remainder Trusts (CRT) and Charitable Gift Annuities (CGA)

The CRT and CGA funds have been adjusted to reflect the activity and balances per Kaspick & Company and the third-party account balances as of December 31, 2017. In April Marc Rosen added stock valued at \$116,913, with a calculated remainder value of \$14,028.

Realized and Unrealized Gains and Losses on Investments

Net year-to-date realized gains were \$1,787, and unrealized losses were \$731,559, for a total loss of \$729,772.

Operating Fund

Total revenue was \$2,235 less than the budget, and total expenses were \$20,927 less than the budget, the realized gains were \$1,010 and the unrealized losses were \$9,536 on the operating reserve held in the Medium-Term Fund portfolio. The actual net operating deficit is \$224,308 compared to a budgeted deficit of \$234,474.

Note: The Expendable Operating Cash-on-Hand is at 4.3 months, excluding the operating reserve of \$500,000 and the building reserve of \$150,000.

Portfolio Performance

The market value of the Long-Term Fund portfolio at 4/30/2018 was \$186,238,985. The one-year Total Return for the Long-Term Endowment Portfolio was 9.5% compared to the Policy Index of 9.1%.

The market value of the Medium-Term Fund portfolio at 4/30/2018 was \$4,640,338. The one-year Total Return for the Medium-Term Portfolio was 5.0% compared to the Policy Index of 4.8%.

The market value of the ESG Fund portfolio at 4/30/2018 was \$3,297,611. The one-year Total Return for the ESG Fund was 7.8% compared to the Policy Index of 8.0%.

Special Program Funds

Special Program Funds include: Pathways to Safety, funded by the ACTION Council of Monterey County; the Center for Nonprofit Excellence funded by the David and Lucile Packard Foundation; the College Futures Foundation program, funded by the College Futures Foundation; the Monterey County Development Professionals, funded with the remaining assets from the dissolution of the Development Executive Network, to be used for professional development for people new to the fundraising field, and networking among those involved in fund development.

Total Special Program revenue was \$424,618 and total expenses were \$108,000.

**COMMUNITY FOUNDATION FOR MONTEREY COUNTY
NOTES TO THE FINANCIAL STATEMENTS
For the Four Months Ended April 30, 2018**

Gifts, Pledges, Bequests, Future Funds Greater than \$25,000, and Grants

Total new contributions for the month were \$736,331, including:

Mr. Marc Rosen	4/4/2018	116,913	CRT Funds with CF as Trustee (Kaspick)
Marsha McMahan Zelus	4/9/2018	104,292	Marsha McMahan Zelus Fund
Taylor Farms Retail, Inc.	4/16/2018	102,000	Taylor Farms Scholarship Fund
Mr. Rob Godfrey	4/17/2018	86,225	Maury Richmond Scholarship Stewardship Fund
California Rodeo, Inc.	4/24/2018	60,000	California Rodeo Salinas Fund
Claire Giannini Fund	4/30/2018	40,000	Next Steps Administrative Fund

Grants to agencies for the month totaling \$594,985 were approved and recorded.

Interfund activity for the month totaled \$211,880.

Contribution/Bequest Receivables

We recorded payment on a receivable from the James Irvine Foundation in the amount of \$133,200, for the James Irvine Foundation Salinas Leadership Fund; an 18-month program to support resident engagement and leadership development in Salinas through a pilot regranting partnership.

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF FINANCIAL POSITION
CONSOLIDATED - ALL FUNDS
For the Four Months Ended April 30, 2018 and April 30, 2017

	COMBINED OPERATING	SPECIAL PROGRAMS	ENDOWMENT	NON ENDOWED	BEQUEST, CRT RECEIVABLES	TOTAL April 30, 2018	TOTAL April 30, 2017
ASSETS							
Cash:							
Cash & Cash Equivalents	1,664,912	424,618	(61,635)	4,613,019	0	6,640,915	7,028,043
Investments - Long Term Fund Portfolio	0	0	136,701,720	49,537,265	0	186,238,985	171,474,557
Investments - Medium Term Fund Portfolio	553,263	0	0	4,087,075	0	4,640,338	2,957,191
Investments - ESG Fund Portfolio	0	0	2,988,068	309,543	0	3,297,611	914,235
Separately Invested Funds	0	0	0	0	0	0	0
Total Cash & Investments	2,218,175	424,618	139,628,153	58,546,902	0	200,817,848	182,374,026
Accounts Receivable:							
Pledges & Contributions Receivable	0	0	4,000	12,750	1,660,800	1,677,550	1,333,890
Bequests & Remainder Interest	0	0	0	0	21,264,615	21,264,615	264,615
Due from OPER	0	0	1,290,468	0	0	1,290,468	1,343,084
Charitable Remainder Trusts	0	0	0	0	31,883,327	31,883,327	27,332,839
Charitable Gift Annuities	0	0	0	0	3,716,462	3,716,462	344,377
Total Accounts Receivable	0	0	1,294,468	12,750	58,525,204	59,832,422	30,618,806
Other Assets:							
Prepaid Expenses	2,619	0	0	0	0	2,619	2,595
Property-Net of Depreciation	1,704,756	0	0	0	0	1,704,756	1,676,657
Total Other Assets	1,707,375	0	0	0	0	1,707,375	1,679,252
TOTAL ASSETS	3,925,550	424,618	140,922,621	58,559,652	58,525,204	262,357,645	214,672,084

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF FINANCIAL POSITION
CONSOLIDATED - ALL FUNDS
For the Four Months Ended April 30, 2018 and April 30, 2017

	COMBINED OPERATING	SPECIAL PROGRAMS	ENDOWMENT	NON ENDOWED	BEQUEST, CRT RECEIVABLES	TOTAL April 30, 2018	TOTAL April 30, 2017
LIABILITIES & NET ASSETS							
Liabilities:							
Grants Payable	0	108,000	209,402	262,100	0	579,502	1,041,642
Contingent Liabilities	0	0	0	0	22,377,289	22,377,289	18,126,673
Funds held as Agency Endowments	0	0	5,927,483	0	0	5,927,483	4,119,756
Funds held as Stewardship Funds	0	0	0	22,394,260	0	22,394,260	16,483,330
Payroll, Misc. and Accts Payable	1,419,170	0	0	0	0	1,419,170	1,423,814
Total Liabilities	1,419,170	108,000	6,136,885	22,656,360	22,377,289	52,697,704	41,195,215
Net Assets:							
Net Assets-Beginning Balance	2,730,689	147,991	135,783,913	40,125,566	35,031,987	213,820,147	167,128,328
Change in Net Assets - Current Year	(224,309)	168,627	(998,177)	(4,222,275)	1,115,927	(4,160,206)	6,348,541
Total Net Assets	2,506,380	316,618	134,785,737	35,903,291	36,147,915	209,659,941	173,476,869
TOTAL LIABILITIES & NET ASSETS	3,925,550	424,618	140,922,621	58,559,652	58,525,204	262,357,645	214,672,084

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF ACTIVITIES
CONSOLIDATED - ALL FUNDS
For the Four Months Ended April 30, 2018 and April 30, 2017

	<u>COMBINED OPERATING</u>	<u>SPECIAL PROGRAMS</u>	<u>ENDOWMENT</u>	<u>NON ENDOWED</u>	<u>BEQUEST, CRT RECEIVABLES</u>	<u>TOTAL April 30, 2018</u>	<u>TOTAL April 30, 2017</u>
SUPPORT AND REVENUE:							
Contributions	9,399	121,000	751,224	1,871,501	0	2,753,124	3,374,557
Interfund Gifts	38,579	0	66,125	637,169	0	741,873	629,037
Pledge Payments Received	0	133,200	0	0	0	133,200	1,917,378
Future Contributions-A/R-Pledge-CRT-CGA	0	0	0	0	1,264,028	1,264,028	0
Contributions Received via Bequest	0	0	0	0	0	0	733,835
Change in Value, Split Interest Trusts, Future Assets	0	0	0	0	0	0	24,825
Gain/Loss on Sale of Property	0	0	0	0	0	0	0
Income from Related Party (LLC)	0	0	0	0	0	0	279,742
Interest & Dividend Income	7,145	52	703,292	280,393	0	990,882	881,479
Administrative Fees	685,944	0	0	0	0	685,944	587,090
Fees from Special Projects	7,479	0	0	0	0	7,479	6,000
Workshop and Contract Service Income	2,199	0	0	0	0	2,199	20,899
Misc Income/Returned Grants	45,259	1,125	0	108,984	0	155,368	18,233
Total Support and Revenue	796,005	255,377	1,520,641	2,898,046	1,264,028	6,734,097	8,473,074
EXPENSES:							
Operating Expenses and Distributions:							
Salaries & Benefits	631,368	0	0	0	0	631,368	623,227
Administrative Costs	223,004	40,717	0	23,198	0	286,919	214,488
Occupancy Costs	62,095	0	0	0	0	62,095	64,986
Development Expenses	93,910	7,032	0	0	0	100,942	58,536
Board & Committee Expenses	1,411	0	0	0	0	1,411	754
Total Operating Expenses	1,011,788	47,749	0	23,198	0	1,082,735	961,989

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF ACTIVITIES
CONSOLIDATED - ALL FUNDS
For the Four Months Ended April 30, 2018 and April 30, 2017

	<u>COMBINED OPERATING</u>	<u>SPECIAL PROGRAMS</u>	<u>ENDOWMENT</u>	<u>NON ENDOWED</u>	<u>BEQUEST, CRT RECEIVABLES</u>	<u>TOTAL April 30, 2018</u>	<u>TOTAL April 30, 2017</u>
Grants and Grant Related Expenses:							
Grants	0	39,000	928,304	6,384,586	0	7,351,889	6,408,450
Interfund Grants	0	0	467,763	274,110	0	741,873	629,037
Pledge Payments Paid	0	0	0	0	133,200	133,200	1,874,742
Bequests Payments/Transfers	0	0	0	0	0	0	42,637
Other Expenses	0	0	55,625	1,466	0	57,090	100,166
Other Payments/Transfers	0	0	1,952	(1,952)	0	0	0
Grant Related Expenses	0	0	0	0	0	0	0
Administrative Fees	0	0	511,372	159,672	14,900	685,944	587,090
Fees to Managers	0	0	82,140	29,659	0	111,798	110,315
Total Grants and Grant Related Expenses	0	39,000	2,047,155	6,847,540	148,100	9,081,795	9,752,436
Total Expenses and Grants	1,011,788	86,749	2,047,155	6,870,738	148,100	10,164,530	10,714,425
Excess of Revenues (Expenses)							
Before Gains on Investments & Transfers	(215,783)	168,627	(526,514)	(3,972,692)	1,115,927	(3,430,433)	(2,241,352)
GAINS(LOSS) ON INVESTMENTS:							
Realized-Gain (Loss)	1,010	0	(3,643)	4,420	0	1,787	(85)
Unrealized-Gain(Loss)	(9,536)	0	(468,020)	(254,003)	0	(731,559)	8,589,979
Total Gain/(Loss) on Investments	(8,526)	0	(471,663)	(249,583)	0	(729,772)	8,589,893
Change in Net Assets	(224,309)	168,627	(998,177)	(4,222,275)	1,115,927	(4,160,206)	6,348,541
Net Assets Beginning of Year	2,730,689	147,991	135,783,913	40,125,566	35,031,987	213,820,147	167,128,328
Net Assets, End of Period	2,506,380	316,618	134,785,737	35,903,291	36,147,915	209,659,941	173,476,869

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
Combined Operating Fund Budget vs. Actual
For the Four Months Ended April 30, 2018 and April 30, 2017

	Year-To-Date			YTD Actual 4/30/2017
	Actual	Budget	Variance	
REVENUE				
Contributions - Foundations	2,524	2,500	24	0
Contributions - Indiv/Corp	6,875	13,600	(6,725)	5,736
Contributions - Interfund	38,579	34,579	4,000	38,252
Bequests Received	0	20,143	(20,143)	14,677
Admin Fees	685,944	686,592	(648)	587,090
Special Project Fees	7,479	5,168	2,311	6,000
Workshops/Contracts	2,199	1,200	999	20,899
Miscellaneous Income	45,259	30,458	14,801	18,233
Interest and Dividends	7,145	4,000	3,145	6,620
Total Revenue	796,005	798,240	(2,235)	697,506
EXPENSE				
Personnel				
Salaries and Wages	479,750	492,195	(12,445)	482,008
Payroll Taxes	40,589	37,278	3,311	41,896
Insurance and Other Benefits	111,028	121,736	(10,708)	99,324
Sub-total	631,368	651,209	(19,841)	623,227
Administrative				
Supplies	10,385	9,635	750	7,860
Equip / Computer Maintenance	57,399	54,148	3,251	16,195
Bank Charges	4,038	3,250	788	3,002
Printing	5,990	6,950	(960)	7,670
Postage / Freight	10,551	7,450	3,101	9,015
Dues/Subscriptions	15,804	20,708	(4,904)	15,239
Services (legal, acct, consult)	69,608	70,123	(515)	64,412
D&O Insurance	2,737	3,000	(263)	4,358
Telecommunications	6,094	6,150	(56)	5,862
Conferences & Training	12,711	10,500	2,211	8,621
Miscellaneous	230	450	(220)	292
Depreciation	27,456	27,456	0	29,936
Sub-total	223,003	219,820	3,183	172,463
Facilities				
Property / Liability Insurance	8,909	9,050	(141)	8,438
Maintenance / Repairs	2,299	3,668	(1,369)	3,946
Janitorial & Landscaping	6,692	6,500	192	6,676
Rent	15,817	16,876	(1,059)	15,422
Mortgage, Interest & Property Taxes	17,360	17,360	0	18,048
Utilities	11,018	10,832	186	12,456
Sub-total	62,095	64,286	(2,192)	64,986
Development, Program & Staff				
Donor Development	68,771	66,784	1,987	20,781
Advertising & Promotion	12,585	13,741	(1,156)	8,273
Mileage, Meals & Meetings	3,634	3,533	101	2,207
Workshops	7,350	9,250	(1,900)	8,595
Annual Meetings	0	250	(250)	0
Annual Report	500	2,466		0
Staff Recognition Expenses	1,070	1,375	(305)	1,178
Board & Committee Expenses	1,411	0	1,411	754
Sub-total	95,322	97,399	(2,077)	41,787
Total Expenses	1,011,787	1,032,714	(20,927)	902,463
Net Income / (Loss) Before Investment Returns	(215,782)	(234,474)	18,692	(204,956)
Realized Gains/(Losses)	1,010	0	1,010	0
Unrealized Gains/(Losses)	(9,536)	0	(9,536)	16,601
Net Income / (Loss) Including Investment Returns	(224,308)	(234,474)	10,166	(188,356)



Here for Good

Community Foundation

for Monterey County

FINANCIAL STATEMENT

For the Five Months Ended May 31, 2018

**COMMUNITY FOUNDATION FOR MONTEREY COUNTY
FINANCIAL REPORTS
For the Five Months Ended May 31, 2018**

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For the Five Months Ended May 31, 2018**

Assets

Total Assets through 5/31/2018 are **\$265,624,494** a **20.18%** increase since May 2017, and a **0.67%** decrease since December 2017.

Charitable Remainder Trusts (CRT) and Charitable Gift Annuities (CGA)

The CRT and CGA funds have been adjusted to reflect the activity and balances per Kaspick & Company and the third-party account balances as of December 31, 2017.

Realized and Unrealized Gains and Losses on Investments

Net year-to-date realized gains were \$1,846, and unrealized gains were \$426,028, for a total gain of \$427,874.

Operating Fund

Total revenue was \$38,356 more than the budget, and total expenses were \$28,636 more than the budget, the realized gains were \$1,010 and the unrealized losses were \$6,463 on the operating reserve held in the Medium-Term Fund portfolio. The actual net operating deficit is \$447,998 compared to a budgeted deficit of \$452,265.

Note: The Expendable Operating Cash-on-Hand is at 3.4 months, excluding the operating reserve of \$500,000 and the building reserve of \$150,000.

Portfolio Performance

The market value of the Long-Term Fund portfolio at 5/31/2018 was \$187,176,746. The one-year Total Return for the Long-Term Endowment Portfolio was 8.9% compared to the Policy Index of 8.5%.

The market value of the Medium-Term Fund portfolio at 5/31/2018 was \$4,804,731. The one-year Total Return for the Long-Term Endowment Portfolio was 4.6% compared to the Policy Index of 4.2%.

The market value of the ESG Fund portfolio at 5/31/2018 was \$3,327,628. The one-year Total Return for the Long-Term Endowment Portfolio was 6.5% compared to the Policy Index of 7.0%.

Special Program Funds

Special Program Funds include: Pathways to Safety, funded by the ACTION Council of Monterey County; the Center for Nonprofit Excellence funded by the David and Lucile Packard Foundation; the College Futures Foundation program, funded by the College Futures Foundation; the Monterey County Development Professionals, funded with the remaining assets from the dissolution of the Development Executive Network, to be used for professional development for people new to the fundraising field, and networking among those involved in fund development; and the Salinas Leadership project, funded by the James Irvine Foundation.

Total Special Program revenue was \$549,383 and total expenses were \$98,975.

**COMMUNITY FOUNDATION FOR MONTEREY COUNTY
NOTES TO THE FINANCIAL STATEMENTS
For the Five Months Ended May 31, 2018**

Gifts, Pledges, Bequests, Future Funds Greater than \$25,000, and Grants

Total new contributions for the month were \$3,533,309, including:

Youth Music Monterey	5/30/2018	100,000	Youth Music Monterey Stewardship Fund
Mr. Peter Neumeier and Mrs. Gillian Taylor	5/22/2018	3,000,000	Neumeier Taylor Foundation Fund
Dr. & Mrs. Charles and Leslie Snorf	5/21/2018	100,000	The Snorf Fund
Monterey Peninsula Foundation	5/16/2018	120,000	The Morse Foundation Stewardship Fund
Monterey Peninsula Foundation	5/8/2018	36,450	Richard and Cindy Zoller Silver Family Legacy Fund

Grants to agencies for the month totaling \$2,216,679 were approved and recorded.

Interfund activity for the month totaled \$134,167.

Contribution/Bequest Receivables

We recorded payment on a receivable from the College Futures Foundation in the amount of \$294,000, for the College Futures Foundation Fund.

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF FINANCIAL POSITION
CONSOLIDATED - ALL FUNDS
For the Five Months Ended May 31, 2018 and May 31, 2017

	COMBINED OPERATING	SPECIAL PROGRAMS	ENDOWMENT	NON ENDOWED	BEQUEST, CRT RECEIVABLES	TOTAL May 31, 2018	TOTAL May 31, 2017
ASSETS							
Cash:							
Cash & Cash Equivalents	1,384,892	707,787	(62,255)	4,054,747	0	6,085,171	6,900,197
Investments - Long Term Fund Portfolio	0	0	137,312,213	49,864,532	0	187,176,746	173,901,528
Investments - Medium Term Fund Portfolio	556,843	0	0	4,247,888	0	4,804,731	4,259,863
Investments - ESG Fund Portfolio	0	0	3,017,398	310,230	0	3,327,628	968,753
Separately Invested - DRIM Portfolio	0	0	0	2,975,000	0	2,975,000	0
Total Cash & Investments	1,941,735	707,787	140,267,356	61,452,397	0	204,369,276	186,030,340
Accounts Receivable:							
Pledges & Contributions Receivable	0	0	4,000	12,750	1,366,800	1,383,550	1,039,890
Bequests & Remainder Interest	0	0	0	0	21,264,615	21,264,615	264,615
Due from OPER	0	0	1,285,813	0	0	1,285,813	1,338,865
Charitable Remainder Trusts	0	0	0	0	31,868,881	31,868,881	27,332,839
Charitable Gift Annuities	0	0	0	0	3,716,462	3,716,462	3,344,377
Total Accounts Receivable	0	0	1,289,813	12,750	58,216,758	59,519,320	33,320,587
Other Assets:							
Prepaid Expenses	1,869	0	0	0	0	1,869	545
Property-Net of Depreciation	1,734,029	0	0	0	0	1,734,029	1,669,173
Total Other Assets	1,735,898	0	0	0	0	1,735,898	1,669,718
TOTAL ASSETS	3,677,634	707,787	141,557,169	61,465,147	58,216,758	265,624,494	221,020,645

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF FINANCIAL POSITION
CONSOLIDATED - ALL FUNDS
For the Five Months Ended May 31, 2018 and May 31, 2017

	<u>COMBINED OPERATING</u>	<u>SPECIAL PROGRAMS</u>	<u>ENDOWMENT</u>	<u>NON ENDOWED</u>	<u>BEQUEST, CRT RECEIVABLES</u>	<u>TOTAL May 31, 2018</u>	<u>TOTAL May 31, 2017</u>
LIABILITIES & NET ASSETS							
Liabilities:							
Grants Payable	0	108,000	333,752	1,166,600	0	1,608,352	1,561,942
Contingent Liabilities	0	0	0	0	22,377,289	22,377,289	20,076,489
Funds held as Agency Endowments	0	0	5,927,483	0	0	5,927,483	4,119,756
Funds held as Stewardship Funds	0	0	0	22,394,260	0	22,394,260	16,483,330
Payroll, Misc. and Accts Payable	1,394,943	1,388	34,802	12,060	0	1,443,193	1,422,059
Total Liabilities	1,394,943	109,388	6,296,037	23,572,921	22,377,289	53,750,577	43,663,575
Net Assets:							
Net Assets-Beginning Balance	2,730,689	147,991	135,783,913	40,125,566	35,031,987	213,820,147	167,128,328
Change in Net Assets -							
Current Year	(447,998)	450,409	(522,781)	(2,233,340)	807,481	(1,946,230)	10,228,743
Total Net Assets	2,282,690	598,400	135,261,132	37,892,226	35,839,469	211,873,917	177,357,070
TOTAL LIABILITIES & NET ASSETS	3,677,634	707,787	141,557,169	61,465,147	58,216,758	265,624,494	221,020,645

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF ACTIVITIES
CONSOLIDATED - ALL FUNDS
For the Five Months Ended May 31, 2018 and May 31, 2017

	<u>COMBINED</u> <u>OPERATING</u>	<u>SPECIAL</u> <u>PROGRAMS</u>	<u>ENDOWMENT</u>	<u>NON</u> <u>ENDOWED</u>	<u>BEQUEST, CRT</u> <u>RECEIVABLES</u>	<u>TOTAL</u> <u>May 31, 2018</u>	<u>TOTAL</u> <u>May 31, 2017</u>
SUPPORT AND REVENUE:							
Contributions	10,449	121,000	801,743	5,353,242	0	6,286,433	5,824,809
Interfund Gifts	38,579	0	66,125	771,336	0	876,040	750,237
Pledge Payments Received	0	427,200	0	0	0	427,200	2,211,378
Future Contributions-A/R-Pledge-CRT-CGA	0	0	0	0	1,264,028	1,264,028	1,050,184
Contributions Received via Bequest	0	0	0	0	0	0	737,283
Change in Value, Split Interest Trusts, Future Assets	0	0	0	0	0	0	24,825
Gain/Loss on Sale of Property	0	0	0	0	0	0	0
Income from Related Party (LLC)	0	0	0	0	0	0	279,742
Interest & Dividend Income	9,126	58	763,485	305,275	0	1,077,944	949,656
Administrative Fees	726,892	0	0	0	0	726,892	588,035
Fees from Special Projects	11,088	0	0	0	0	11,088	7,500
Workshop and Contract Service Income	2,199	0	0	0	0	2,199	20,899
Misc Income/Returned Grants	45,259	1,125	0	108,984	0	155,368	35,974
Total Support and Revenue	843,592	549,383	1,631,352	6,538,836	1,264,028	10,827,191	12,480,523
EXPENSES:							
Operating Expenses and Distributions:							
Salaries & Benefits	857,649	0	0	0	0	857,649	765,129
Administrative Costs	251,944	50,965	0	23,756	0	326,664	244,424
Occupancy Costs	80,539	0	0	0	0	80,539	77,927
Development Expenses	94,366	9,010	0	0	0	103,376	92,861
Board & Committee Expenses	1,639	0	0	0	0	1,639	1,131
Total Operating Expenses	1,286,137	59,975	0	23,756	0	1,369,868	1,181,473

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
STATEMENT OF ACTIVITIES
CONSOLIDATED - ALL FUNDS
For the Five Months Ended May 31, 2018 and May 31, 2017

	<u>COMBINED</u> <u>OPERATING</u>	<u>SPECIAL</u> <u>PROGRAMS</u>	<u>ENDOWMENT</u>	<u>NON</u> <u>ENDOWED</u>	<u>BEQUEST, CRT</u> <u>RECEIVABLES</u>	<u>TOTAL</u> <u>May 31, 2018</u>	<u>TOTAL</u> <u>May 31, 2017</u>
Grants and Grant Related Expenses:							
Grants	0	39,000	1,306,384	8,223,184	0	9,568,568	7,772,889
Interfund Grants	0	0	508,563	367,477	0	876,040	750,237
Pledge Payments Paid	0	0	0	0	427,200	427,200	2,168,742
Bequests Payments/Transfers	0	0	0	0	0	0	42,637
Other Expenses	0	0	91,047	13,526	0	104,573	100,166
Other Payments/Transfers	0	0	1,952	(1,952)	0	0	0
Grant Related Expenses	0	0	0	0	0	0	0
Administrative Fees	0	0	511,865	185,680	29,346	726,892	588,035
Fees to Managers	0	0	94,146	34,009	0	128,155	126,227
Total Grants and Grant Related Expenses	0	39,000	2,513,957	8,821,924	456,546	11,831,428	11,548,933
Total Expenses and Grants	1,286,137	98,975	2,513,957	8,845,680	456,546	13,201,295	12,730,405
Excess of Revenues (Expenses)							
Before Gains on Investments & Transfers	(442,545)	450,409	(882,605)	(2,306,843)	807,481	(2,374,104)	(249,882)
GAINS(LOSS) ON INVESTMENTS:							
Realized-Gain (Loss)	1,010	0	(3,643)	4,479	0	1,846	2,668
Unrealized-Gain(Loss)	(6,463)	0	363,467	69,025	0	426,028	10,475,957
Total Gain/(Loss) on Investments	(5,453)	0	359,824	73,504	0	427,874	10,478,625
Change in Net Assets	(447,998)	450,409	(522,781)	(2,233,340)	807,481	(1,946,230)	10,228,743
Net Assets Beginning of Year	2,730,689	147,991	135,783,913	40,125,566	35,031,987	213,820,147	167,128,328
Net Assets, End of Period	2,282,690	598,400	135,261,132	37,892,226	35,839,469	211,873,917	177,357,070

COMMUNITY FOUNDATION FOR MONTEREY COUNTY
Combined Operating Fund Budget vs. Actual
For the Five Months Ended May 31, 2018 and May 31, 2017

	Year-To-Date			YTD Actual 5/31/2017
	Actual	Budget	Variance	
REVENUE				
Contributions - Foundations	2,524	2,500	24	0
Contributions - Indiv/Corp	7,925	17,000	(9,075)	7,736
Contributions - Interfund	38,579	34,579	4,000	38,252
Bequests Received	0	20,143	(20,143)	18,125
Admin Fees	726,892	686,592	40,300	588,035
Special Project Fees	11,088	6,460	4,628	7,500
Workshops/Contracts	2,199	1,600	599	20,899
Miscellaneous Income	45,259	31,362	13,897	35,974
Interest and Dividends	9,126	5,000	4,126	7,861
Total Revenue	843,592	805,236	38,356	724,383
EXPENSE				
Personnel				
Salaries and Wages	661,145	615,243	45,902	591,148
Payroll Taxes	53,907	46,597	7,310	50,027
Insurance and Other Benefits	142,597	152,045	(9,448)	123,954
Sub-total	857,649	813,885	43,764	765,129
Administrative				
Supplies	12,335	11,180	1,155	10,011
Equip / Computer Maintenance	61,396	59,435	1,961	21,137
Bank Charges	6,326	3,750	2,576	3,393
Printing	5,990	9,875	(3,885)	8,778
Postage / Freight	10,627	8,450	2,177	10,053
Dues/Subscriptions	17,764	23,964	(6,200)	15,689
Services (legal, acct, consult)	76,262	81,663	(5,401)	69,256
D&O Insurance	2,737	3,000	(263)	4,358
Telecommunications	7,464	7,675	(211)	7,242
Conferences & Training	16,463	13,600	2,863	8,656
Miscellaneous	260	450	(190)	292
Depreciation	34,320	34,320	0	37,420
Sub-total	251,944	257,362	(5,418)	196,285
Facilities				
Property / Liability Insurance	11,469	9,050	2,419	8,438
Maintenance / Repairs	5,493	4,585	908	4,743
Janitorial & Landscaping	8,371	8,125	246	8,463
Rent	19,786	21,095	(1,309)	19,278
Mortgage, Interest & Property Taxes	21,662	21,662	0	22,524
Utilities	13,759	13,540	219	14,482
Sub-total	80,539	78,057	2,483	77,927
Development, Program & Staff				
Donor Development	65,561	69,230	(3,669)	44,833
Advertising & Promotion	15,158	16,462	(1,304)	10,599
Mileage, Meals & Meetings	3,957	4,385	(428)	2,666
Workshops	8,017	11,500	(3,483)	10,364
Annual Meetings	0	2,000	(2,000)	0
Annual Report	500	250		1,178
Staff Recognition Expenses	1,173	2,495	(1,322)	1,131
Board & Committee Expenses	1,639	1,875	(236)	0
Sub-total	96,005	108,197	(12,192)	70,770
Total Expenses	1,286,137	1,257,501	28,636	1,110,111
Net Income / (Loss) Before Investment Returns	(442,545)	(452,265)	9,720	(385,728)
Realized Gains/(Losses)	1,010	0	1,010	0
Unrealized Gains/(Losses)	(6,463)	0	(6,463)	21,949
Net Income / (Loss) Including Investment Returns	(447,998)	(452,265)	4,266	(363,779)



Community Foundation for Monterey County

Distinguished Trustee Award Recipients

The Distinguished Trustee Award has been presented since 1989 to acknowledge **outstanding leadership in trusteeship and charitable giving. The recipients have all demonstrated exceptional generosity and commitment to building important institutions in Monterey County. Awardees need not have had an affiliation with the CFMC.** Since 2007, a grant of \$10,000 has been awarded in their honor to an agency or agencies of their choosing. We are asking board members to submit a brief recommendation in writing for your top candidate for this award to Dan Baldwin for the May 22 Executive Committee meeting. The Executive Committee will review your recommendations and make a final recommendation/report to the full board at its June meeting. The Distinguished Trustee is presented at the Celebration of Philanthropy. Tell us why you believe your candidate would be a good selection. Thanks for your assistance with this important and unique honor.

2017-David and Susan Gill (King City)

2016-William Tyler, III (Pebble Beach)

2015-Nancy Ausonio (Castroville)

2014-Robert Nunes (resides Pebble Beach; Ag business in Salinas Valley)

2013-Warren Wayland (Salinas)

2012-David and Laurie Benjamin (Peninsula)

2011-Mike and Mary Orradre (San Ardo; South County)

2010-Bob and Sue Antle (Salinas)

2009-Julie Packard (Peninsula)

2008-Sherrie McCullough (Peninsula)

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



**Resource Development Summary
April-18**

**Current Activity Report
Number of Meetings/Contacts
April 2018**

Month	Professional Advisor	Prospects	Current Fund Holders	Presentations	Events	Newsletters Crescendo eBlasts
January	5	11	5	5 *See below	8 *See below	6
February	3	27	11	5 *See below	7 *See below	6
March	7	15	17	6 *See Below	7 *See Below	6
April	12	26	19	3 *See below	9 *See below	6
May						
June						
July						
August						
September						
October						
November						
December						
Total Activity	27	79	52	19	31	24

January Events: CHSP Leadership Council, Northern California Planned Giving Council, Junior Achievement Luncheon, Monterey Museum of Art, Siembra Latinos Fund, Planned Parenthood Luncheon, CFMC Board Retreat, CFMC Staff Retreat, Bright Futures Convening, AFP Board Meeting, Sun Street Centers, Montage Health Annual Meeting, Chowder Group

February Events: Carmel Women's Club, SMCF DonorEvent, Legacy Society, Monterey Public Library, MC Gives! Check Celebration, Sheriff Advisory council, Siembra Latinos Fund, Women's Fund Leadership Council, Rancho Cielo Culinary Round up, Carmel Realty AT & T, MMA board retreat, Estate Planning Professionals Seminar- Montage, AFP Board

March Events: Bright Futures, LCCF Public Policy, Center for Photographic Arts, CSUMB: Sam Farr, College Futures Donor Education, CFMC Bright Futures Convening, College Futures, San Benito CF, CPA Bag Stuffing, Veterans Cemetery Foundation, Bright Futures Core Conveners, Wells Fargo Women Give 2018, Golbal Oceans Gala

April Events: San Benito CF Board Retreat, Integris Wealth PA presentation, Tour of Montage Health, DEN/AFP, NCG Conference, NMCF Donor Event, LCCF Board Mtg.,CF United Conference, Women's Fund Luncheon, Siembra Latinos, I Am Jane Doe Screening, Ciao Cioppino! MPC Foundation Luncheon, Rick Antle Celebration of Life

May Events:

June Events:

July Events:

August Events:

September Events:

October Events:

November Events:

December Events:

*On-going: Salinas & Monterey Rotary Clubs

Planned Gifts

New Legacy Society Members for the Month:	0
Expectancy Additions Year to Date:	\$3,000,000
Legacy Society Members to Date:	222
Total Expectancies to Date:	\$205,175,673

New Funds Created 2018

Type of Fund	Number of Funds	Establishing Gift
Endowment		
Carmel Woman's Club Scholarship Endowment Fund	1	\$ 11,562.76
Rancho Cielo Endowment Fund	1	\$ 100,500.00
Non - Endowed Donor Advised		
California Rodeo Salinas Fund	1	\$ 60,000.00
Jim and Linda Tunney Fund	1	\$ -
Richard and Cindy Zoller Silver Family Legacy Fund	1	\$ 36,450.00
Agency/Stewardship		
Maury Richmond Scholarship Stewardship Fund	1	\$ 86,225.00
Scholarship		
Nan Borreson and Fred Terman Scholarship Fund	1	\$ 10,000.00
Carmel Valley Women's Club Foundation Scholarship Fund	1	\$ 10,000.00
R. J. Harper Memorial Scholarship Fund	1	\$ 4,000.00
Steven Paul Schmidt Scholarship Fund	1	\$ 323,481.07
Taylor Farms Scholarship Fund	1	\$ 102,000.00
Designated Fund		
Special Purpose Fund		
Animal Welfare Assistance Group Fund	1	\$ -
Field of Interest		
Program Fund		
James Irvine Foundation Salinas Leadership Fund	1	\$ 1,250,000.00
New Funds Created Total:	13	\$ 1,994,218.83

Total Contributions

Year 2018 - YTD	\$ 4,363,346
Year 2017 - YTD	\$ 4,151,028



Community Foundation
for Monterey County
Resource Development Summary
May-18

Current Activity Report Number of Meetings/Contacts May 2018								
Month	Professional Advisor	Prospects	Current Fund Holders	Presentations	Events	Newsletters Crescendo eBlasts		
January	5	11	5	5	*See below	8	*See below	6
February	3	27	11	5	*See below	7	*See below	6
March	7	15	17	6	*See Below	7	*See Below	6
April	12	26	19	3	*See below	9	*See below	6
May	9	27	14	2	*See below	14	*See below	6
June								
July								
August								
September								
October								
November								
December								
Total Activity	36	106	66	21		45		30
January Events: CHSP Leadership Council, Northern California Planned Giving Council, Junior Achievement Luncheon, Monterey Museum of Art, Siembra Latinos Fund, Planned Parenthood Luncheon, CFMC Board Retreat, CFMC Staff Retreat, Bright Futures Convening, AFP Board Meeting, Sun Street Centers, Montage Health Annual Meeting, Chowder Group								
February Events: Carmel Women's Club, SMCDF DonorEvent, Legacy Society, Monterey Public Library, MC Gives! Check Celebration, Sheriff Advisory council, Siembra Latinos Fund, Women's Fund Leadership Council, Rancho Cielo Culinary Round up, Carmel Realty AT & T, MMA board retreat, Estate Planning Professionals Seminar- Montage, AFP Board								
March Events: Bright Futures, LCCF Public Policy, Center for Photographic Arts, CSUMB: Sam Farr, College Futures Donor Education, CFMC Bright Futures Convening, College Futures, San Benito CF, CPA Bag Stuffing, Veterans Cemetery Foundation, Bright Futures Core Conveners, Wells Fargo Women Give 2018, Golbal Oceans Gala								
April Events: San Benito CF Board Retreat, Integris Wealth PA presentation, Tour of Montage Health, DEN/AFP, NCG Conference, NMCF Donor Event, LCCF Board Mtg.,CF United Conference, Women's Fund Luncheon, Siembra Latinos, I Am Jane Doe Screening, Ciao Cioppino! MPC Foundation Luncheon, Rick Antle Celebration of Life								
May Events: Leadership Monterey County, Northern California Planned Giving Council Annual Conference, SunStreet Center Dodd Awards, Church in the Forest, LCCF Board Meeting, CPE Forum, CA Census Convening, Homelessness Convening, Panetta Institute, CHSP Leadership Council, PALS, LCCF CEO/Board Chair Retreat								
June Events:								
July Events:								
August Events:								
September Events:								
October Events:								
November Events:								
December Events:								
*On-going: Salinas & Monterey Rotary Clubs								
Planned Gifts								
New Legacy Society Members for the Month:								0
Expectancy Additions Year to Date:								\$3,000,000
Legacy Society Members to Date:								222
Total Expectancies to Date:								\$205,175,673
New Funds Created 2018								
Type of Fund	Number of Funds			Establishing Gift				
Endowment								
Carmel Woman's Club Scholarship Endowment Fund	1			\$ 11,562.76				
Rancho Cielo Endowment Fund	1			\$ 100,500.00				
Non - Endowed Donor Advised								
California Rodeo Salinas Fund	1			\$ 60,000.00				
Jim and Linda Tunney Fund	1			\$ -				
Richard and Cindy Zoller Silver Family Legacy Fund	1			\$ 36,450.00				
Agency/Stewardship								
Maury Richmond Scholarship Stewardship Fund	1			\$ 86,225.00				
Youth Music Monterey Stewardship Fund	1			\$ 100,000.00				
Scholarship								
American Culinary Federation Monterey Bay Chapter, Marc H. Vadrines	1			\$ 10,000.00				
Nan Borreson and Fred Terman Scholarship Fund	1			\$ 10,000.00				
Whitney Elisabeth Grummon Memorial Scholarship Fund	1			\$ 20,000.00				
Carmel Valley Women's Club Foundation Scholarship Fund	1			\$ 10,000.00				
R. J. Harper Memorial Scholarship Fund	1			\$ 4,000.00				
Steven Paul Schmidt Scholarship Fund	1			\$ 323,481.07				
Taylor Farms Scholarship Fund	1			\$ 102,000.00				
Designated Fund								
Donor Recommended Investment Management Fund								
Neumeier Taylor Foundation Fund	1			\$ 3,000,000.00				
Special Purpose Fund								
Animal Welfare Assistance Group Fund	1			\$ -				
Field of Interest								
Program Fund								
James Irvine Foundation Salinas Leadership Fund	1			\$ 1,250,000.00				
New Funds Created Total:				17	\$			5,124,218.83
Total Contributions								
Year 2018 - YTD				\$				8,190,655
Year 2017 - YTD				\$				9,898,729

Community Foundation for Monterey County

Grants - April 1, 2018 - May 31, 2018

Awards

Anthony Nicholas Narigi Memorial Baseball Endowment	Dominican Baseball Camp	20181013	1,000	baseball trip for Nathan Chapman
Anthony Nicholas Narigi Memorial Baseball Endowment	Monterey Waves Baseball	20181014	950	summer travel ball for Orlando Corona
Anthony Nicholas Narigi Memorial Baseball Endowment	Cypress Sports Gators Baseball Softball Academy	20181015	1,000	summer travel ball for Michael Carnazzo
		Total	2,950	

Community Impact

Douglas Madsen Fund for HIV/AIDS Housing in Monterey County	Access Support Network	20181035	48,000	Maximizing housing stability and homeless prevention for people living with HIV in Monterey County
Margaret L Musser FOI Fund / Kathleen and Howard Marks Fund	Alliance on Aging	20180125	35,000	Help seniors navigate the programs and access benefits that positively impact their lives
Jose F. Fernandez Fund / Margaret L Musser FOI Fund / Paul Block Jr. Fund	Alzheimer's Disease and Related Disorders Association	20181020	20,000	Alzheimer's education and support in Monterey County for families and healthcare providers
Dr. George & Sam Kih Thorngate Family Fund / Ken and Gundy DuVall Fund	Aspiranet	20181032	20,000	Cherish Receiving Center and Cherish Too Visitation Center of Monterey County
Doolittle Fund / Dr. Frank Pye Smith Medical Facilities Fund	Big Sur Health Center	20181029	25,000	Healthcare for all in Big Sur
Stephen and Madeleine Conran Fund	Big Sur Marathon Foundation	20181026	15,000	JUST RUN Youth Fitness Program
Lauralie and J. Irvine Fund	Boys & Girls Clubs of Monterey County	20181054	25,000	Teen Centers Capital Project
Engracia Irene Murray FOI Fund	Carmel Foundation	20180595	10,000	Meal programs for seniors
Reese Family Fund / Stephen and Madeleine Conran Fund	CASA of Monterey County	20181040	25,000	Court-Appointed advocacy for Monterey County's most vulnerable foster youth
Ken and Gundy DuVall Fund	Catholic Charities Of The Diocese Of Monterey	20181027	20,000	CalFresh outreach, enrollment and case management in Monterey County
Ken and Gundy DuVall Fund / Margaret L Musser FOI Fund	Central Coast Center for Independent Living	20181030	25,000	Increasing independence for people with disabilities
Youth Fund / Lauralie and J. Irvine Fund / Maureen Bradford Fund	Central Coast YMCA	20181055	20,000	Youth Fit For Life
Clyn & Pamela Smith Fund / Lewis and Gloria Fenton Fund / The John and Mary Dawson Learning Fund	City of Greenfield	20181056	25,000	After-school, hands-on science enrichment programs
The James M. and Marjorie E. Sturgeon Fund / Stephen and Madeleine Conran Fund	Coalition of Homeless Services Providers	20181039	15,000	Coordination of the local homeless service system
Dr. James Valentine Fund	Coastal Kids Home Care	20180597	10,000	In-home nursing and therapy for children with illness and disability
Birt and Kathleen Johnson, Jr. Fund / Andrew D. and Marjorie S. Orrick Fund / Kathleen and Austin Barrown Fund	Community Partnership for Youth	20181057	30,000	After-school mentor-tutor prevention program
Dr. James Valentine Fund / Evelyn and Spencer Thompson Fund / Reese Family Fund / Ken and Gundy Duvall Fund / Good Neighbor Basic Human Needs Fund / Margaret L Musser FOI Fund	Food Bank for Monterey County	20181022	30,000	Emergency Supplemental Food Assistance
Jose F. Fernandez Fund / Stephen and Madeleine Conran Fund / Mary Jane Drummond Fund	Foundation for Monterey County Free Libraries	20181059	25,000	General operating support
Dr. George & Sam Kih Thorngate Family Fund / Lauralie and J. Irvine Fund	Franciscan Workers of Junipero Serra	20181042	30,000	'Bridge over Barriers' immediate, proactive intervention for homeless adults waiting for assistance
Lauralie and J. Irvine Fund	Girl Scouts of California's Central Coast	20181060	25,000	Girl Scout Leadership Experience
Shirley I. Thackara Fund / Lauralie and J. Irvine Fund / Fund for the 21st Century	Girls Inc. of the Central Coast	20181061	25,000	Leadership and youth development programs
Mary Jane Drummond Fund / Kathleen and Austin Barrows Fund / Cislini Fund #2	Hartnell College Foundation	20181062	30,000	K-12 STEM Program expansion

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Elmer Mills Harris Fund / Engracia Irene Murray FOI Fund	Health Projects Center	20181024	25,000	Del Mar Caregiver Resource Center
Jose F. Fernandez Fund / Margaret L Musser FOI Fund	Independent Transportation Network Monterey County	20181036	15,000	Dignified Transportation for Seniors and Visually Impaired Adults
Lauralie and J. Irvine Fund	Interim, Inc.	20181023	20,000	Shelter Cove - Unit Rehabilitation
The John & Mary Dawson Learning Fund	KIDPOWER	20180588	10,000	Starting Strong? student safety program for migrant children
Reese Family Fund	Kinship Center	20180596	12,000	Recruitment of foster and adoptive parents
Cislini Fund #2	Life Is For Everyone, Inc.	20180591	12,000	After-school program
Dr. James Valentine Fund / Reese Family Fund / Margaret L Musser FOI Fund	Meals on Wheels of the Monterey Peninsula	20181021	20,000	Home delivered meal program
Elmer Mills Harris Fund / Ken and Gundy DuVall Fund	Meals on Wheels of the Salinas Valley, Inc.	20181041	25,000	Home-delivered meal program
Stephen and Madeleine Conran Fund	Monterey County Rape Crisis Center	20181033	25,000	Child Abuse Prevention Education Program
Jose F. Fernandez Fund / Irving R. and Helen G. Stuart Fund / John R Marron Fund	Monterey Peninsula College Foundation	20181063	23,900	Outdoor Learning Classroom at Early Childhood Education Lab School
Dr. Frank Pye Smith Medical Facilities Fund	Natividad Medical Foundation	20181019	25,000	5 Steps to Prevent Diabetes
Cislini Fund #2	Olinga Learning	20180589	12,000	Wings of Knowledge STEM Program
Fuqua Family Foundation Fund / John R Marron Fund / Cislini Fund #2 / The John and Mary Dawson Learning Fund	Partners for Peace	20181064	20,000	Parent Project facilitator training
Reese Family Fund / Dr. Frank Pye Smith Medical Facilities Fund	Planned Parenthood Mar Monte	20181034	26,000	Clinical operating funds for Seaside and Salinas health centers
The John & Mary Dawson Learning Fund	Positive Discipline Community Resources	20180590	10,000	Parenting for Strong Communities
Birt and Kathleen Johnson, Jr. Fund / Jose F. Fernandez Fund / Fund for the 21st Century	Raising A Reader	20181065	20,000	Early childhood and family literacy program
Fuqua Family Foundation Fund / The John and Mary Dawson Learning Fund / Lewis and Gloria Fenton Fund / Shirley I. Thackara Fund	Read to Me Project	20181066	25,000	Prevention-based pre-literacy programs
Leslie B. Kadis, MD & Ruth McClendon Foundation Fund / Clyn and Pamela Smith Fund / Vallentin Fund / The Donna Roop Endowment Fund	Restorative Justice Partners, Inc.	20181067	20,000	Restorative Justice in the Schools
Dr. James Valentine Fund / Dr. Frank Pye Smith Medical Facilities Fund	RotaCare Bay Area, Inc.	20181031	20,000	RotaCare Monterey, free medical clinic services
Reese Family Fund / Dr. Frank Pye Smith Medical Facilities Fund / Dr. Deorge and Sam Kih Thorngate Family Fund	Salud Para La Gente, Inc.	20181028	25,000	Children's Dental Disease Prevention and Treatment Program, Monterey County
The John & Mary Dawson Learning Fund	Seniors Council of Santa Cruz and San Benito Counties	20180593	12,000	Foster Grandparent Program
Steven D. Kesselring and Jean M. Forrest Fund	Silicon Valley Education Foundation	20180594	12,000	Elevate [Math] program in Salinas and Soledad
Sarah and Robert Bouchier Fund / Vallentin Fund / Stephen and Madeleine Conran Fund / Lewis and Gloria Fenton Fund / Ken and Gundy DuVall Fund	Sun Street Centers	20181038	30,000	Safe Teens Empowerment Project: Peninsula, Salinas, South County (Drug/Alcohol Prevention)
Reese Family Fund / Fund for the 21st Century	The Epicenter	20181058	20,000	Youth-led community center serving foster youth
Cislini Fund #2	The Wahine Project	20180592	10,000	EI Proyecto de Wahine Sur
Ken and Gundy DuVall Fund	United Way Monterey County	20181037	15,000	2-1-1 Monterey County Information and Referral Services
Birt and Kathleen Johnson, Jr. Fund / Stephen and Madeleine Conran Fund	Village Project, Inc.	20181068	25,000	Mae C. Johnson Education and Cultural Enrichment Program
		Total	1,047,900	

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Donor Advised					
The David and Lucile Packard Foundation Fund	ACTION Council of Monterey County	20180671		42,000	2018-2019 Salinas Youth Initiative: for Urban Arts Collaborative which includes \$30,000 for program and small capital and \$12,000 for technical assistance
The David and Lucile Packard Foundation Fund	ACTION Council of Monterey County	20180664		35,400	2018-2019 Salinas Youth Initiative: for Cesar Chavez Futbol Academy which includes \$30,000 for program and small capital and \$5,400 for technical assistance
The David and Lucile Packard Foundation Fund	ACTION Council of Monterey County	20180673		40,000	2018-2019 Salinas Youth Initiative: for Artist Ink which includes \$30,000 for program and small capital and \$10,000 for technical assistance
The David and Lucile Packard Foundation Fund	Alisal Center for the Fine Arts	20180663		40,000	2018-2019 Salinas Youth Initiative: for Alisal Community Arts Network which includes \$30,000 for program and small capital and \$10,000 for technical assistance
Ausonio Family Fund	Alliance on Aging	20180479		1,000	general operating support
Marti and Steve Diamond Charitable Foundation Fund	American Cancer Society - Oregon	20180515		500	general operating support
The Peter and Jackie Henning Fund	Amherst College	20180986		2,000	general operating support
Ramsey Shirk Fund	Amigos De Santa Cruz Foundation	20180549		5,000	matching funds for Give Big
Friends of Community Animal Services Fund	Animal Friends Rescue Project	20180985		4,500	animal-related services (spay/neuter clinic)
Jean and Jim Duff Fund	Animal Friends Rescue Project	20180641		5,000	general operating support
Ausonio Family Fund	Animal Friends Rescue Project	20180638		500	the area with the greatest need
Ausonio Family Fund	ARIEL Theatrical, Inc.	20180468		3,000	general operating support
Peter and Anne Thorp Fund	Arts Council for Monterey County	20180529		500	general operating support
Chris's Fund	Ave Maria Convalescent Hospital	20180659		5,000	the music program
The Fred Terman and Nan Borreson Fund	Bay Area Chess	20180982		1,000	general operating support
Marsha McMahan Zelus Fund	Big Sur Land Trust	20180524		20,000	the Comprehensive Campaign
Ausonio Family Fund	Big Sur Land Trust	20180547		2,000	trail maintenance and/or rehabilitation
Farrell/Allen Carmel Rotary Fund	Big Sur Marathon Foundation	20181001		2,000	to subsidize the entry fee for 200 students for Just Run
Ausonio Family Fund	Boys & Girls Clubs of Monterey County	20180494		1,000	general operating support
Lori and Lou Flagg Memorial Youth Fund	Boys & Girls Clubs of Monterey County	20180513	②	111,000	capital maintenance and improvements, including fixing the leaking roof and skylights and installing a solar energy system
Lenore and Dale Meyer Fund	Boys & Girls Clubs of Monterey County	20180499		5,000	general operating support
Tom Grainger Memorial Fund	Boys & Girls Clubs of Monterey County	20180560		1,000	general operating support of the Salinas Clubhouse
Pass Thru Fund	Cal Alumni Club of the Monterey Peninsula	20180562		30	general operating support
Ausonio Family Fund	Campaign for the Preservation of Mission San Antonio de Padua	20180489		1,000	general operating support
Jean and Jim Duff Fund	Carmel Art Association	20180642		5,000	general operating support
Doolittle Fund	Carmel Bach Festival	20180542		15,000	general operating support
The Jackie and Mark Wendland Fund	Carmel Bach Festival	20180550		1,750	musician sponsorships for Mhairi Lawson and Alice Kirwan Murray for the 2018 festival
The Peter and Jackie Henning Fund	Carmel Bach Festival	20180520		2,500	musician sponsorships for Alicia Mastomonaco, Dawn Walker, Wayne Soloman, Tim Krol, and Owen McIntosh

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The Landreth Family Fund	Carmel Ideas Foundation	20180505		15,000	general operating support for the Pebble Beach Authors and Ideas Festival
Dekker Davidson Foundation	Carmel Music Society	20180648		500	general operating support
James I. and Barbara S. Miller Charitable Fund	Carmel Presbyterian Church	20180989		2,000	general operating support
James I. and Barbara S. Miller Charitable Fund	Carmel Presbyterian Church	20180567		2,000	general operating support
Valera Whitford Lyles Fund	Carmel-By-The Sea Public Library Foundation	20180577		1,000	general operating support
Ausonio Family Fund	Carmelite Monastery	20180472		1,000	general operating support
Ausonio Family Fund	CASA of Monterey County	20180477		1,500	general operating support
Ausonio Family Fund	Catholic Charities Of The Diocese Of Monterey	20180484		2,000	general operating support
The David and Lucile Packard Foundation Fund	Center for Community Advocacy	20180672		40,000	2018-2019 Salinas Youth Initiative: \$30,000 for program and small capital and \$10,000 for technical assistance
Ausonio Family Fund	Central Coast VNA and Hospice	20180469		2,000	general operating support
Peter and Anne Thorp Fund	Chamber Music Monterey Bay	20180676		500	general operating support
Lenore and Dale Meyer Fund	Chamber Music Monterey Bay	20180496		4,500	general operating support
The Peter and Jackie Henning Fund	Chamber Music Monterey Bay	20180519		10,000	program and audience development to preserve the tradition of live classical chamber music performance
The David and Lucile Packard Foundation Fund	CHISPA	20180993	②	65,000	the 2018-2019 Salinas Youth Initiative: \$55,000 for program and small capital and \$10,000 for technical assistance
Farrell/Allen Carmel Rotary Fund	City of Monterey	20181002		580	to support the cost of two disadvantaged children to attend Camp Quien Sabe for one week
The David and Lucile Packard Foundation Fund	City of Salinas	20180995	②	55,000	the 2018-2019 Salinas Youth Initiative: for the Salinas Public Library; \$55,000 for program and small capital
The Kohn Family Theatre and Arts Fund	City of Walnut Grove	20181007		3,000	general operating support for the Ambulance Service
Nepenthe/Phoenix Corporation Fund	Coast Property Owners Association	20180988		5,000	due diligence match funding for the community housing development
Marti and Steve Diamond Charitable Foundation Fund	Corporation of Fine Arts Museums	20180517		2,500	general operating support
Ausonio Family Fund	CSUMB Panetta Institute for Public Policy	20180470		1,000	general operating support
Neidel Family Fund	Cystic Fibrosis Foundation, Rocky Mountain Chapter	20180662		500	the Katie's Crusaders Team, Great Strides New Mexico 2018
Farrell/Allen Carmel Rotary Fund	Dance Kids of Monterey County	20181003		2,000	the in-school tour program "The Folklorico Nutcracker"
Monterey Firemen's Charitable Association Fund	Dream Time Foundation	20180678		300	a sponsorship of Jordan Chaty's participation in the basketball tournament
The David and Lucile Packard Foundation Fund	El Camino Real Futbol League	20180665		45,000	2018-2019 Salinas Youth Initiative: \$35,000 for program and small capital and \$10,000 for technical assistance
Ausonio Family Fund	El Sistema USA / Salinas	20180493		1,000	general operating support
Tom Grainger Memorial Fund	Elizabeth's Library	20180561		500	to support mailing books to Africa
Ausonio Family Fund	Elkhorn Slough Foundation	20180492		1,000	general operating support
Marta L. Bennett Fund	ensemblenewSRQ	20180977		400	the Community Foundation of Sarasota County's Giving Partner Challenge
Marta L. Bennett Fund	ensemblenewSRQ	20180680		600	Community Foundation of Sarasota County's Giving Partner Challenge
Peter and Anne Thorp Fund	Food Bank for Monterey County	20180675		500	general operating support
Chris's Fund	Forest Hill Manor	20180660		5,000	the music program

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Ausonio Family Fund	Foundation for Monterey County Free Libraries	20180485	2,000	general operating support
McMahan Family Fund	Foundation of California State University Monterey Bay	20180570	5,000	Farr Legacy Collection
Anonymous Fund	Foundation of California State University Monterey Bay	20180571	5,000	Farr Legacy Collection
Jean and Jim Duff Fund	Friends of Sunset Foundation	20180643	10,000	general operating support
Ausonio Family Fund	Friends of the Andy Ausonio Library	20180486	2,000	general operating support
Reese Family Fund	Friends of the Pacific Grove Library	20180554	500	general operating support
Ramsey Shirk Fund	Friends of the San Juans	20180578	500	the 2018 Lopez Island Canoe Journey
James I. and Barbara S. Miller Charitable Fund	Frontiers	20180568	500	Will Jordan's Afghanistan Mission
James I. and Barbara S. Miller Charitable Fund	Frontiers	20180991	500	Will Jordan's Afghanistan Mission
The Fred Terman and Nan Borreson Fund	Gathering for Women-Monterey	20180983	1,000	general operating support
The Snorf Fund	Gathering for Women-Monterey	20180509	2,500	the Capital Campaign
Sarah and Robert Bouchier Fund	Gathering for Women-Monterey	20180639	500	general operating support
Barbara Paul and Tom LaFaille Fund	Gathering for Women-Monterey	20180564	500	the Capital Campaign
The David and Lucile Packard Foundation Fund	Gil Basketball Academy	20180667	45,000	2018-2019 Salinas Youth Initiative: \$35,000 for program and small capital and \$10,000 for technical assistance
Ausonio Family Fund	Girl Scouts of California's Central Coast	20180488	2,000	general operating support
Reese Family Fund	GLIDE Foundation	20180556	500	general operating support
Anthony and Lary Lynn Muller Fund	Guide Dogs for the Blind	20180979	500	general operating support
Cappy Martin/Vernon Hurd Monterey Rotary Club Fund	Harmony at Home	20180532	10,000	Teen Programs and Teen Success, Inc.
Cappy Martin/Vernon Hurd Monterey Rotary Club Fund	Harmony at Home	20180996	10,000	Teen Programs and Teen Success, Inc.
D'Arrigo-Martin Fund	Hartnell College Foundation	20180981	2,000	the Salinas Valley Promise Scholarship Fund
Doris Parker Fee Fund #2	Hawaii Community Foundation	20180575	1,000	Kauai Recovery and Relief Fund
The David and Lucile Packard Foundation Fund	Hijos Del Sol Arts Productions	20180668	42,000	2018-2019 Salinas Youth Initiative: \$30,000 for program and small capital and \$12,000 for technical assistance
Valera Whitford Lyles Fund	Historic Garden League	20180576	10,000	general operating support
Lenore and Dale Meyer Fund	Hospice Giving Foundation	20180495	10,000	general operating support
Jean and Jim Duff Fund	I Cantori Di Carmel	20180644	10,000	general operating support
The Buffett Fund	Junior League of Monterey County	20180657	25,000	to provide funds to help with the cost of replacing the roof of The Old Whaling Station Adobe
Anthony and Lary Lynn Muller Fund	KAZU-FM Radio 90.3	20180510	1,000	general operating support
Reese Family Fund	KAZU-FM Radio 90.3	20180553	500	general operating support
Steven D. Kesselring and Jean M. Forrest Fund	King City Boxing Club	20181006	500	general operating support
Buccafurni-Lawrence Fund	King's College	20180565	5,000	two scholarships (\$2,500 each) for the best of the best students in the sciences, regardless of financial considerations. The faculty will select the grant recipients
Ausonio Family Fund	Kinship Center	20180471	1,000	general operating support
Fuhs Family Foundation Fund	KQED, Inc.	20180508	1,000	general operating support
Reese Family Fund	KQED, Inc.	20180552	500	general operating support
Ausonio Family Fund	Legal Services for Seniors	20180476	1,000	general operating support
Monterey Firemen's Charitable Association Fund	Legal Services for Seniors	20180573	500	general operating support

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Marti and Steve Diamond Charitable Foundation Fund	Leukemia & Lymphoma Society Georgia	20181053		1,000	Steve Gross' Man & Woman of the Year Campaign
The David and Lucile Packard Foundation Fund	Life Is For Everyone, Inc.	20180669		39,700	2018-2019 Salinas Youth Initiative: \$30,000 for program and small capital and \$9,700 for technical assistance
Ramsey Shirk Fund	Lopez Island Family Resource Center	20180579		5,250	the Lopez Fit Scholarship Program
Farrell/Allen/LaSalle Carmel Rotary Fund	Meals on Wheels of the Monterey Peninsula	20180999		5,000	the Home Delivered Meals program
Fuqua Family Foundation Fund	Meals on Wheels of the Monterey Peninsula	20180559		1,500	Women Who Care
Lenore and Dale Meyer Fund	Meals on Wheels of the Monterey Peninsula	20180497		3,500	general operating support
Ausonio Family Fund	Meals on Wheels of the Salinas Valley, Inc.	20180481		2,000	general operating support
James I. and Barbara S. Miller Charitable Fund	Mercy Corps International	20180992		500	international food aid
James I. and Barbara S. Miller Charitable Fund	Mercy Corps International	20180518		500	international food aid
Doolittle Fund	Montage Health Foundation	20180541		25,000	the Molecular Testing and Automation in the Clinical Microbiology project
F. Robert Nunes Family Fund	Montage Health Foundation	20180636		25,000	the Stroke Awareness Program
Peter and Anne Thorp Fund	Montage Health Foundation	20180655		2,500	general operating support
Mahoney/Peterson Family Fund	Montage Health Foundation	20180527		1,000	general operating support
Ausonio Family Fund	Monterey County Agricultural Education, Inc.	20180546		500	general operating support
Anthony and Lary Lynn Muller Fund	Monterey County Symphony Association	20180980		500	general operating support
Lenore and Dale Meyer Fund	Monterey County Symphony Association	20180501		5,000	educational programs
Monterey Firemen's Charitable Association Fund	Monterey High School	20180548		500	the purchase of a pole vaulting system and/or participation in track meets
Jean and Jim Duff Fund	Monterey History & Art Association	20180646		10,000	general operating support
The Landreth Family Fund	Monterey Museum of Art	20180640		5,000	general operating support
Doolittle Fund	Monterey Peninsula College Foundation	20180543		10,000	Doolittle Performing Arts Fund
Lenore and Dale Meyer Fund	Monterey Peninsula College Foundation	20180500		15,000	general operating support
Buccafurni-Lawrence Fund	Mount Saint Joseph Academy	20180566		5,000	two scholarships (\$2,500 each) for the best of the best in the junior class, i.e. those students with the highest GPA, regardless of financial considerations. The faculty will select the grant recipients
Reese Family Fund	Museum Foundation of Pacific Grove, Inc.	20180654		500	Science Saturdays
Reese Family Fund	Napa Emergency Women's Services	20180651		500	general operating support
Marcia F. DeVoe Fund	National Trust for Historic Preservation, Western Regional Office	20180521		5,000	the Marcia DeVoe room at Cooper-Molera Adobe in Monterey, CA
Jose F. Fernandez Fund	Natural Resources Defense Council	20180656		10,000	general operating support
Anthony and Lary Lynn Muller Fund	NCGA Foundation	20180512		1,000	the Sofia Cruz YOC Scholarship
The Buffett Fund	Oregon Shakespeare Festival	20180658	②	100,000	to support the production of "Mother Road" for the 2019 season
Ausonio Family Fund	Our Lady of Refuge Church	20180475		10,000	the building fund
Farrell/Allen/LaSalle Carmel Rotary Fund	Pacific Repertory Theatre	20180998		25,000	Phase 2 of the Capital Initiative to complete the last major remodel of the Golden Bough Playhouse
Jean and Jim Duff Fund	Pacific Repertory Theatre	20180645		10,000	general operating support
Ausonio Family Fund	Palma School	20180487		2,000	general operating support

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Farrell/Allen Carmel Rotary Fund	Paraphrase Productions	20181004		1,000	operating support for two summer musicals
The David and Lucile Packard Foundation Fund	Partners for Peace	20180670		40,000	2018-2019 Salinas Youth Initiative: \$30,000 for program and small capital and \$10,000 for technical assistance
Marsha McMahan Zelus Fund	Planned Parenthood Federation of America	20180525		4,000	President's Circle
Reese Family Fund	Pomona College	20180653		500	general operating support
Reese Family Fund	Reed College	20180551		5,000	general operating support
The David and Lucile Packard Foundation Fund	Restorative Justice Partners, Inc.	20180994	②	52,475	the 2018-2019 Salinas Youth Initiative: \$40,000 for program and small capital and \$12,475 for technical assistance
Ausonio Family Fund	Saint Mary's College of California	20180490		2,000	general operating support
Ausonio Family Fund	Salinas Community YMCA	20180473		2,000	general operating support
Anthony and Lary Lynn Muller Fund	Salvation Army - Monterey Peninsula Corps	20180674		1,000	general operating support
Reese Family Fund	Salvation Army - Monterey Peninsula Corps	20180555		500	general operating support
Ausonio Family Fund	San Carlos Cathedral	20180483		2,000	general operating support
Marti and Steve Diamond Charitable Foundation Fund	San Francisco AIDS Foundation	20180679		800	the AIDS/LifeCycle 2018. Please apply this grant to participant 2476, Mr. Juan Medrano's campaign
Marti and Steve Diamond Charitable Foundation Fund	San Francisco Museum of Modern Art	20180516		2,500	general operating support
Lenore and Dale Meyer Fund	Save The Redwoods League	20180502		10,000	general operating support
Ausonio Family Fund	Silicon Valley Monterey Bay Council, Boy Scouts of America	20180482		2,000	general operating support
Farrell/Allen/LaSalle Carmel Rotary Fund	SPCA of Monterey County	20181000		3,000	the Treatment, Learning, and Compassion program
Lenore and Dale Meyer Fund	SPCA of Monterey County	20180498		10,000	adoption services
Reese Family Fund	SPCA of Monterey County	20180557		2,000	the Wildlife Center (\$1,000) and general operating support (\$1,000)
Anthony and Lary Lynn Muller Fund	SPCA of Monterey County	20180511		5,000	general operating support
Reese Family Fund	St. Jude Children's Research Hospital	20180558		500	general operating support
Wiegand Family Foundation	Stevenson School	20180978		1,500	the Dormer Coaches Award Fund
Zekai and Carolyn Akcan Fund	Stevenson School	20180987		1,000	the annual fund drive
The Fred Terman and Nan Borreson Fund	Stevenson School	20180506		1,000	the financial aid fund
Martin and Nancy Dodd Fund	Sun Street Centers	20180677		7,343	the Martin and Nancy Dodd Awards
Lenore and Dale Meyer Fund	Sunset Cultural Center	20180503		10,000	general operating support
Ausonio Family Fund	Tatum's Garden Foundation	20180491		1,000	general operating support
James I. and Barbara S. Miller Charitable Fund	The Bridge Restoration Ministry	20180569		1,000	drug & alcohol rehabilitation programs in Monterey County
James I. and Barbara S. Miller Charitable Fund	The Bridge Restoration Ministry	20180990		1,000	drug & alcohol rehabilitation programs in Monterey County
Pass Thru Fund	The Cal Alumni Association	20180563		100	general operating support
The David and Lucile Packard Foundation Fund	The Epicenter	20180666		40,000	2018-2019 Salinas Youth Initiative: \$30,000 for program and small capital and \$10,000 for technical assistance
The Fred Terman and Nan Borreson Fund	The JED Foundation	20180984		500	general operating support
Reese Family Fund	The Leaven Program	20180652		1,000	general operating support

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Farrell/Allen/LaSalle Carmel Rotary Fund	The Rotary Club of Carmel-by-the-Sea Foundation	20180997	②	130,000	initially funding the Rotary Club of Carmel-by-the-Sea Foundation; represents scholarships budgeted for Rotary year 2016-17 totaling \$60,000 and for Rotary year 2017-18 totaling \$70,000
Reese Family Fund	UC Davis Foundation	20180650		2,000	to assist a low-income undergraduate who has entered UC Davis in Fall 2016 from Fairfield High School and is majoring in a STEM field.
Fuhs Family Foundation Fund	Union of Concerned Scientists, Inc.	20180545		500	general operating support
Ausonio Family Fund	United Way Monterey County	20180478		10,000	general operating support
Fuhs Family Foundation Fund	USA for UNHCR, The UN Refugee Agency	20180544		500	general operating support
Ausonio Family Fund	Valley Guild	20180474		1,000	general operating support
Ausonio Family Fund	Veterans Transition Center of Monterey County	20180637		2,000	the area with the greatest need
Women's Fund Endowment	Women Rising Productions	20180533		1,500	an honorarium for Sarah's Women's Fund Lunch appearance
Marsha McMahan Zelus Fund	World Wildlife Fund	20180526		3,000	the annual partnership gift
Lehman Family Fund	York School	20180661		1,000	general operating support
Marsha McMahan Zelus Fund	York School	20180522		500	the Raise the Paddle Project
Will and Mary Shaw Fund	Youth Arts Collective (YAC)	20181005		2,000	general operating support
Jean and Jim Duff Fund	Youth Music Monterey	20180647		10,000	general operating support
		Total		1,536,728	

Field of Interest

Women's Fund Endowment	Monterey Peninsula College Foundation	20180976		5,000	Emergency assistance for women (MPC Foundation's Emergency Assistance Program)
Katherine Curtis Springer Fibromyalgia and Chronic Fatigue Syndrome Patient Support Fund	Salinas Valley Memorial Hospital Foundation	20181009	②	77,203	Medical expenses for patients diagnosed w/Chronic Fatigue, Fibromyalgia, Gulf War Syndrome
		Total		82,203	

Neighborhood Grants

General Endowment-NGP Grants	Ballet Folklorico Tapatio	20180193		3,000	celebración del décimo-año del Aniversario
General Endowment-NGP Grants	Castroville Midnighters Car Club	20180148		2,500	Midnighters Holiday Giveaway
General Endowment-NGP Grants	Friends of Marina Parks	20180184		4,000	Friends of Marina Parks, a community volunteer organization to improve neighborhood parks in Marina
General Endowment-NGP Grants	Gonzales Youth Guardians	20180206		1,500	Gonzales Youth Guardians
General Endowment-NGP Grants	Kalpulli Oceloyotl	20180199		4,000	Oceloyotl, Uplift our children and Youth through Aztec Dance
General Endowment-NGP Grants	LULAC Youth Council #2087	20180196		3,000	Farmworker youth leadership training, college preparedness and community service projects
General Endowment-NGP Grants	Monterey County NAACP Youth Council	20180205		4,000	NAACP 24th Annual Youth Summit
General Endowment-NGP Grants	Noche Bohemia	20180201		2,500	gastos asociados con el evento, Noche Bohemia
General Endowment-NGP Grants	Padres de Niños Especiales del Sur del Condado	20180147		4,000	reuniones mensuales
General Endowment-NGP Grants	Renacer en Alegria	20180194		4,000	Terapia de Musica
General Endowment-NGP Grants	Salinas Youth LULAC #709	20180198		3,000	Education and Career Exploration

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General Endowment-NGP Grants	Team Villa Boxing	20180188	3,000	Offering our youth free boxing and physical fitness.
General Endowment-NGP Grants	Tu Puedes King City	20180187	4,000	Proyecto para mejorar la comunidad
General Endowment-NGP Grants	United Castroville Neighbors	20180197	4,000	Bringing our youth and community together to promote love, peace and unity
General Endowment-NGP Grants	Yaocuahtli Danza Cultural	20180208	3,500	Evento Cultural: Fundacion de Mexico Tenochtitlan
		Total	50,000	

Opportunity

General Endowment - Opportunity Fund	Central Coast Center for Independent Living	20180585	5,000	Assistance in developing an Executive Director transition plan
		Total	5,000	

Organizational Development

General Endowment - Opportunity Fund	CASA of Monterey County	20180584	3,531	Facilitated full-day board workshop including a strategic plan update and board skills development
General Endowment - Opportunity Fund	Youth Arts Collective (YAC)	20180586	3,900	Board and staff retreat to develop a five-year vision and strategic plan
		Total	7,431	

Scholarships

The Morse Foundation Scholarship Fund	Arkansas State University	20180930	5,000	Jorey Scott
San Ardo Foundation for Education	Cal Poly Pomona	20180954	1,500	Aaron Hernandez
Shelley Watts Scholarship Fund	Cal Poly, San Luis Obispo	20180968	900	Mikayla Rae Davis
Hugo and Dolores Tottino Family Scholarship Fund	Cal Poly, San Luis Obispo	20180966	2,500	Jumeika Lopez-Arteaga
Wilbur H. and Maxine D. Stevens Scholarship Fund	Cal Poly, San Luis Obispo	20180960	1,500	Juan Rivera Perez
Hugo and Dolores Tottino Family Scholarship Fund	Cal Poly, San Luis Obispo	20180964	2,500	Cassady Elizabeth Healy
Girls' Health in Girls' Hands Scholarship Fund	California College of the Arts	20180865	2,000	Erandy Leon Pantoja
Robert Hattori Nakamura Memorial Scholarship Fund	Central Arizona College	20180946	400	Carlos Daniel Moreno Robles
The Morse Foundation Scholarship Fund	Central Coast College	20180920	600	Annie Erazo
The Morse Foundation Scholarship Fund	Central Coast College	20180945	1,900	Vanessa Lopez
Raymond H. Costa Family Scholarship Fund	Central Coast College	20180813	2,500	Alyssa Maydon
College Futures Monterey County Fund	CSU Bakersfield	20180779	4,000	Isidro Cabrera Soria
College Futures Monterey County Fund	CSU Chico	20180757	4,000	Andrea Garcia Perez
College Futures Monterey County Fund	CSU Chico	20180798	3,000	Pamela Yvette Santos
The Morse Foundation Scholarship Fund	CSU Chico	20180935	5,000	Mallory Zoller
College Futures Monterey County Fund	CSU East Bay	20180771	4,000	Eric Ruiz Monroy
College Futures Monterey County Fund	CSU East Bay	20180699	5,000	Andrea Araceli Perez
College Futures Monterey County Fund	CSU Fresno	20180773	4,000	Fatima Ruiz
College Futures Monterey County Fund	CSU Fresno	20180777	4,000	Guadalupe Camacho-Garcia

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College Futures Monterey County Fund	CSU Fresno	20180801	3,000	Ricardo Lopez Ivich
College Futures Monterey County Fund	CSU Fresno	20180748	5,000	Valeria Useda
College Futures Monterey County Fund	CSU Fresno	20180796	4,000	Nancy Alvarez
College Futures Monterey County Fund	CSU Fresno	20180794	4,000	Miguel Angel Pulido
College Futures Monterey County Fund	CSU Fresno	20180694	5,000	Aliza Marie-Ramirez Vasquez
College Futures Monterey County Fund	CSU Fresno	20180799	4,000	Ramiro Zavala Albor
College Futures Monterey County Fund	CSU Fresno	20180805	4,000	Sergio Alberto Flores Cardenas
College Futures Monterey County Fund	CSU Fresno	20180783	4,000	Janet Almaraz
College Futures Monterey County Fund	CSU Fresno	20180736	5,000	Michelle Lopez Aguilar
Girls' Health in Girls' Hands Scholarship Fund	CSU Fresno	20180900	2,000	Valeria Useda
Girls' Health in Girls' Hands Scholarship Fund	CSU Fresno	20180875	2,000	Janet Almaraz
Horace H. Wilson Scholarship Fund	CSU Fresno	20180973	2,000	Jaquelin Vazquez Medrano
Girls' Health in Girls' Hands Scholarship Fund	CSU Fresno	20180870	2,000	Halexcen Haylyn Palomares Diaz
Girls' Health in Girls' Hands Scholarship Fund	CSU Fullerton	20180898	2,000	Sol Carolina Camarillo Aguilar
College Futures Monterey County Fund	CSU Los Angeles	20180806	4,000	Trinidad Berenice Morales-Garza
College Futures Monterey County Fund	CSU Monterey Bay	20180795	4,000	Milagros Joselyn Ortega
College Futures Monterey County Fund	CSU Monterey Bay	20180785	4,000	Jesus Floriano-Ramirez
College Futures Monterey County Fund	CSU Monterey Bay	20180782	4,000	Jairo S Medina
Raymond H. Costa Family Scholarship Fund	CSU Monterey Bay	20180814	5,000	Ana Cristina Landin
College Futures Monterey County Fund	CSU Monterey Bay	20180697	5,000	Amanda Luann Contreras
College Futures Monterey County Fund	CSU Monterey Bay	20180792	3,000	Manuel Sanchez
College Futures Monterey County Fund	CSU Monterey Bay	20180809	4,000	Zithalyc Castro
College Futures Monterey County Fund	CSU Monterey Bay	20180774	4,000	Gabriela Aguilar De La Cruz
College Futures Monterey County Fund	CSU Monterey Bay	20180772	4,000	Esmeralda Alvarez
College Futures Monterey County Fund	CSU Monterey Bay	20180778	3,000	Gustavo Aquino Bernardino
College Futures Monterey County Fund	CSU Monterey Bay	20180769	3,000	Eddie Chavez
College Futures Monterey County Fund	CSU Monterey Bay	20180768	4,000	Diana Pacheco Figueroa
College Futures Monterey County Fund	CSU Monterey Bay	20180764	4,000	Cindy Leon
College Futures Monterey County Fund	CSU Monterey Bay	20180760	4,000	Bianca Guadalupe Uribe
College Futures Monterey County Fund	CSU Monterey Bay	20180759	4,000	Aylin Yaratzeth Hernandez Vega
College Futures Monterey County Fund	CSU Monterey Bay	20180793	4,000	Mariana Partida Lopez
College Futures Monterey County Fund	CSU Monterey Bay	20180752	4,000	Alexis Cruz Hernandez Edu
College Futures Monterey County Fund	CSU Monterey Bay	20180797	4,000	Natalie Marie Jenkins
Margaret and Seba Bronson Scholarship Fund	CSU Monterey Bay	20180687	40,000	Arianna Reanne Serrato
College Futures Monterey County Fund	CSU Monterey Bay	20180728	5,000	Juan Antonio Trinidad Luis
College Futures Monterey County Fund	CSU Monterey Bay	20180719	3,500	Irais E Garcia Pacheco
College Futures Monterey County Fund	CSU Monterey Bay	20180721	5,000	Ismael Aldape Rocha

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Raymond H. Costa Family Scholarship Fund	CSU Monterey Bay	20180825	5,000	Zuleyma Victoria Valdez Valdez
Raymond H. Costa Family Scholarship Fund	CSU Monterey Bay	20180824	5,000	Jesus Floriano-Ramirez
Raymond H. Costa Family Scholarship Fund	CSU Monterey Bay	20180823	5,000	Ivan Artemio Gonzalez
Raymond H. Costa Family Scholarship Fund	CSU Monterey Bay	20180817	5,000	Bianca Guadalupe Uribe
Raymond H. Costa Family Scholarship Fund	CSU Monterey Bay	20180815	5,000	Andrea de Jesus Valdez Valdez
The Bissell Fund	CSU Monterey Bay	20180685	2,000	Cobey L Davis
College Futures Monterey County Fund	CSU Monterey Bay	20180800	4,000	Raul Magos Padilla
College Futures Monterey County Fund	CSU Monterey Bay	20180691	5,000	Adriana Vieyra
College Futures Monterey County Fund	CSU Monterey Bay	20180787	4,000	Kayli Garcia Ortiz
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180867	2,000	Francisca Frida Martha Rios
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180939	5,000	Marisa Vinson
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180929	5,000	Jeelene Luna
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180926	5,000	Guiselle Aviles
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180924	5,000	Edwin Hermosillo
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180944	5,000	Shelby Marcuson
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180923	5,000	Dolyn Hall
Libby Olver Scholarship Fund	CSU Monterey Bay	20180948	2,500	Jezella Ileana Peraza
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180919	1,250	Alex Aquino-Reyes
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180903	2,000	Veronica Gutierrez- Delgado
Libby Olver Scholarship Fund	CSU Monterey Bay	20180949	2,500	Sandi Jeannette Mendez
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180936	5,000	Margarita Gonzalez
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180896	2,000	Sarah Nunez Gandara
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180895	2,000	Sandi Jeannette Mendez
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180889	2,000	Nancy Merino Lopez
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180888	2,000	Michelle Trujillo
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180880	2,000	Kayli Garcia Ortiz
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180846	15,000	Yasmin Maricela Fernandez Rodriguez
Carmel Valley Women's Club Foundation Scholarship Fund	CSU Monterey Bay	20180827	1,000	Chloe Simone Horning
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180844	15,000	Kiara Elizabeth Garcia-Egan
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180843	15,000	Mattie Jean Cherry
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180856	2,000	Celeste Camacho Islas
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180841	15,000	Katherine Marie Varin
The Morse Foundation Scholarship Fund	CSU Monterey Bay	20180938	5,000	Maria Tena
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180839	15,000	Amanda Nicole Krepp
Girls' Health in Girls' Hands Scholarship Fund	CSU Monterey Bay	20180857	2,000	Cindy Leon
Carmel Valley Women's Club Foundation Scholarship Fund	CSU Monterey Bay	20180832	3,000	Mattie Jean Cherry
Drezner Family Scholarship Fund	CSU Monterey Bay	20180836	10,000	Yasmin Maricela Fernandez Rodriguez

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Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180838	15,000	Alvin Do
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180845	15,000	Oli Eide
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180840	15,000	Jorge Diaz Sanchez
Joel and Dena Gambord Nursing Scholarship	CSU Monterey Bay	20180842	15,000	Laura Renee Ackerman
Girls' Health in Girls' Hands Scholarship Fund	CSU Northridge	20180874	2,000	Janely Chavez-Melendez
College Futures Monterey County Fund	CSU Northridge	20180712	5,000	Daniel Saldana
College Futures Monterey County Fund	CSU Northridge	20180723	5,000	Janely Chavez-Melendez
College Futures Monterey County Fund	CSU Sacramento	20180784	4,000	Jessica Rodriguez
College Futures Monterey County Fund	CSU Sacramento	20180788	4,000	Liliana Constantino
Raymond H. Costa Family Scholarship Fund	CSU Sacramento	20180822	5,000	Gabriela Jorge Maldonado
College Futures Monterey County Fund	CSU Sacramento	20180753	4,000	Ana Espinosa
College Futures Monterey County Fund	CSU Sacramento	20180770	4,000	Elidia Farfan Tapia
College Futures Monterey County Fund	CSU Sacramento	20180767	4,000	Diana Lizbeth Castro
College Futures Monterey County Fund	CSU Sacramento	20180808	4,000	Zeferina Villa De Jesus
College Futures Monterey County Fund	CSU Sacramento	20180776	4,000	Gisela Marlet Aparicio
Girls' Health in Girls' Hands Scholarship Fund	CSU Sacramento	20180859	2,000	Damaris Guadalupe Ispache
Shelley Watts Scholarship Fund	CSU Sacramento	20180967	900	Gisela Marlet Aparicio
Girls' Health in Girls' Hands Scholarship Fund	CSU Sacramento	20180877	2,000	Jovanna Acevedo Ramirez
Girls' Health in Girls' Hands Scholarship Fund	CSU Sacramento	20180868	2,000	Gisela Marlet Aparicio
Girls' Health in Girls' Hands Scholarship Fund	CSU Stanislaus	20180858	2,000	Cynthia Chavez
College Futures Monterey County Fund	CSU Stanislaus	20180743	5,000	Raquel Bernal Alonzo
College Futures Monterey County Fund	CSU Stanislaus	20180755	4,000	Anastacio Bejarano Jr.
Jess Harrison Family Scholarship Fund	Cuesta College	20180908	4,000	Victoria Avila
Dr. Roger and Kate Bartels Memorial Scholarship Fund	Fresno Pacific University	20180684	500	Mayte Garzon Sanchez
College Futures Monterey County Fund	Hartnell College	20180737	1,500	Noemi Amezcua Moreno
Raymond H. Costa Family Scholarship Fund	Hartnell College	20180819	5,000	Celine Nicole Castro
College Futures Monterey County Fund	Hartnell College	20180731	1,500	Leslie Isabel Mojica
College Futures Monterey County Fund	Hartnell College	20180742	1,000	Pedro Jesus Ramirez
College Futures Monterey County Fund	Hartnell College	20180746	1,500	Susana Anabel Flores
College Futures Monterey County Fund	Hartnell College	20180706	1,500	Carlos Garcia
College Futures Monterey County Fund	Hartnell College	20180741	1,500	Paula Ruby Beltran
College Futures Monterey County Fund	Hartnell College	20180726	1,500	Jose Barroso Arredondo
College Futures Monterey County Fund	Hartnell College	20180751	1,500	Yosselin Cuevas Perez Yasmin
College Futures Monterey County Fund	Hartnell College	20180711	1,500	Daniel Lamas
Raymond H. Costa Family Scholarship Fund	Hartnell College	20180821	1,250	Felipe Lorenzo Campa
College Futures Monterey County Fund	Hartnell College	20180754	1,500	Analilia Santos Robles
College Futures Monterey County Fund	Hartnell College	20180732	1,500	Lydia Munoz Araujo

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College Futures Monterey County Fund	Hartnell College	20180714	1,500	Daysi Perez Gutierrez
College Futures Monterey County Fund	Hartnell College	20180763	1,500	Celine Nicole Castro
College Futures Monterey County Fund	Hartnell College	20180720	1,500	Isabel Estrada-Sanchez
College Futures Monterey County Fund	Hartnell College	20180790	1,500	Lucia Esmeralda Paredes Cerda
College Futures Monterey County Fund	Hartnell College	20180718	1,500	Gisset Guadalupe Rico-Valdez
College Futures Monterey County Fund	Hartnell College	20180700	1,500	Andrea Juarez-Contreras Joanna
Raymond H. Costa Family Scholarship Fund	Hartnell College	20180818	5,000	Brian Frank Lopez
College Futures Monterey County Fund	Hartnell College	20180765	1,500	Cristobal Vega Huerta
College Futures Monterey County Fund	Hartnell College	20180750	1,000	Virginia Garnica
College Futures Monterey County Fund	Hartnell College	20180744	1,500	Sandi Cervantes Morales
The Morse Foundation Scholarship Fund	Hartnell College	20180932	2,500	Kelvin Garcia
The Morse Foundation Scholarship Fund	Hartnell College	20180927	2,500	Gustavo Jacuinde
The Morse Foundation Scholarship Fund	Hartnell College	20180933	2,500	Lizbeth Jacuinde
Joseph and Betty Spradling Scholarship Fund	Hartnell College	20180957	2,000	Brianna Sanchez Ortega
Girls' Health in Girls' Hands Scholarship Fund	Hartnell College	20180849	2,000	Alexis Monique Ramirez
Girls' Health in Girls' Hands Scholarship Fund	Hartnell College	20180851	1,000	Anallia Santos Robles
The Morse Foundation Scholarship Fund	Hartnell College	20180934	2,500	Magali Alvarez
The Morse Foundation Scholarship Fund	Hartnell College	20180931	1,250	Juan Garcia
The Morse Foundation Scholarship Fund	Hartnell College	20180921	2,500	Christian Ramirez
College Futures Monterey County Fund	Harvard College	20180707	3,500	Cecilia Ramirez Trujillo
Rotary Club of Monterey Martin/Hurd Scholarship Fund	Howard University	20180910	5,000	Reika Oceana Valentin
Girls' Health in Girls' Hands Scholarship Fund	Humboldt State University	20180891	2,000	Odalis Adriana Coronado
College Futures Monterey County Fund	Humboldt State University	20180738	5,000	Odalis Adriana Coronado
Richard Scott Reynolds Science and Technology Education Scholarship Fund	Lehigh University	20180953	9,000	Natasha Katharine Hunt
The Morse Foundation Scholarship Fund	Middlebury Institute of International Studies at Monterey	20180943	5,000	Robert Moore
College Futures Monterey County Fund	Monterey Peninsula College	20180724	1,500	Jesus Maravilla Avalos
Hugo and Dolores Tottino Family Scholarship Fund	Monterey Peninsula College	20180963	2,500	Breana olga Holguin
Raymond H. Costa Family Scholarship Fund	Monterey Peninsula College	20180820	2,500	Eduardo Herrera
The Morse Foundation Scholarship Fund	Monterey Peninsula College	20180922	2,500	Connor Moody
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180686	2,000	Carlos Daniel Melendez-Aranda
Kristopher Pallastrini Fund	Monterey Peninsula College	20180952	600	Erika Marcela Gonzalez-Padilla
College Futures Monterey County Fund	Monterey Peninsula College	20180696	1,000	Alvin Mendoza
Joseph and Betty Spradling Scholarship Fund	Monterey Peninsula College	20180959	2,000	Sky Lorin Guice
College Futures Monterey County Fund	Monterey Peninsula College	20180716	1,500	Edwin Perez Ramirez
Joseph and Betty Spradling Scholarship Fund	Monterey Peninsula College	20180958	2,000	Raymond O'™Brien
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180528	500	Daniel Garcia

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James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180530	500	Griffin Sims
David L. Ferguson Scholarship Fund	Pellissippi State Community College	20180837	1,250	Sara Amaya-Renee Bonilla
Carmel Valley Women's Club Foundation Scholarship Fund	Saint Louis University	20180830	3,000	Jessica Marie Small
Girls' Health in Girls' Hands Scholarship Fund	Saint Mary's College of California	20180883	2,000	Lindsey Tea Hashimoto
Carmel Valley Women's Club Foundation Scholarship Fund	San Diego State University	20180826	1,000	Catherine Rose Ogata
Girls' Health in Girls' Hands Scholarship Fund	San Diego State University	20180878	2,000	Kailani Gilbuena
Girls' Health in Girls' Hands Scholarship Fund	San Diego State University	20180863	2,000	Elena Rose Meza
College Futures Monterey County Fund	San Diego State University	20180756	3,000	Andrea Cabrera-Sanchez
College Futures Monterey County Fund	San Francisco State University	20180735	5,000	Melissa Aceves-Yepez
College Futures Monterey County Fund	San Francisco State University	20180722	5,000	Janelle Gil
College Futures Monterey County Fund	San Francisco State University	20180740	5,000	Patricia Rochelle Rico
College Futures Monterey County Fund	San Francisco State University	20180749	5,000	Vanessa Anahi Millan
College Futures Monterey County Fund	San Francisco State University	20180761	4,000	Brian Alexander Aguilar Perez
Girls' Health in Girls' Hands Scholarship Fund	San Francisco State University	20180901	2,000	Vanessa Anahi Millan
Girls' Health in Girls' Hands Scholarship Fund	San Francisco State University	20180886	2,000	Melissa Aceves-Yepez
Girls' Health in Girls' Hands Scholarship Fund	San Francisco State University	20180892	2,000	Patricia Rochelle Rico
Girls' Health in Girls' Hands Scholarship Fund	San Jose State University	20180861	2,000	Delia Maria Regalado Virgen
The Morse Foundation Scholarship Fund	San Jose State University	20180941	2,500	Michael Walker
Girls' Health in Girls' Hands Scholarship Fund	San Jose State University	20180893	2,000	Rocio Lara-Puente
Girls' Health in Girls' Hands Scholarship Fund	San Jose State University	20180866	2,000	Fabiola Lopez
Girls' Health in Girls' Hands Scholarship Fund	San Jose State University	20180864	2,000	Emily Merlin
CHISPA Scholarship Fund	San Jose State University	20180810	1,000	Antonio de Jesus Gonzalez Fuentes
College Futures Monterey County Fund	San Jose State University	20180710	5,000	Daira Selene Hipolito
College Futures Monterey County Fund	San Jose State University	20180802	4,000	Rocio Lara-Puente
Rotary Club of Monterey Martin/Hurd Scholarship Fund	Santa Clara University	20180917	5,000	Neida Cabrera Sanchez
Monica Abbott Scholarship Fund	Seattle University	20180681	1,000	Chloe Rose Deleissegues
Carmel High School Class of 1952 Fund	Sonoma State University	20180811	2,500	Jenifer Ofelia Solano
College Futures Monterey County Fund	Sonoma State University	20180729	5,000	Karla G Gallo
Girls' Health in Girls' Hands Scholarship Fund	Sonoma State University	20180902	2,000	Vanessa Beas
Carmel Valley Women's Club Foundation Scholarship Fund	Sonoma State University	20180829	3,000	Jenifer Ofelia Solano
Girls' Health in Girls' Hands Scholarship Fund	UC Berkeley	20180894	2,000	Rosa Angela Sanchez Garcia
Girls' Health in Girls' Hands Scholarship Fund	UC Berkeley	20180854	2,000	Bella-Graciela Camacho Chavez
Robert Hattori Nakamura Memorial Scholarship Fund	UC Berkeley	20180947	400	Kelly Claire Rice
The Morse Foundation Scholarship Fund	UC Berkeley	20180928	5,000	Ian Geertsen
Girls' Health in Girls' Hands Scholarship Fund	UC Berkeley	20180881	2,000	Lilybeth Camacho Chavez
Rotary Club of Monterey Martin/Hurd Scholarship Fund	UC Berkeley	20180913	5,000	Edwin G Monroy-Delgado
Girls' Health in Girls' Hands Scholarship Fund	UC Berkeley	20180884	2,000	Ma Guadalupe Romo-Gonzalez

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Girls' Health in Girls' Hands Scholarship Fund	UC Berkeley	20180905	2,000	Xenia Quetzali Suarez
Carmel Valley Women's Club Foundation Scholarship Fund	UC Berkeley	20180831	2,000	Kelly Claire Rice
College Futures Monterey County Fund	UC Berkeley	20180766	3,000	Daisy Gallardo
College Futures Monterey County Fund	UC Berkeley	20180807	3,000	William Huang
College Futures Monterey County Fund	UC Berkeley	20180725	3,500	Jocelyn Martinez Barrera
Margaret and Seba Bronson Scholarship Fund	UC Berkeley	20180688	20,000	Gisselle Ruiz Sosa
College Futures Monterey County Fund	UC Berkeley	20180758	3,000	Anthony Alexis Garcia Hernandez
College Futures Monterey County Fund	UC Davis	20180705	3,500	Bianca-Yesenia Cruz Aguayo
College Futures Monterey County Fund	UC Davis	20180791	3,000	Lupita L Garcia
College Futures Monterey County Fund	UC Davis	20180708	3,500	Christopher Kevin Mandujano
College Futures Monterey County Fund	UC Davis	20180715	2,500	Diego Jimenez
College Futures Monterey County Fund	UC Davis	20180693	3,500	Alejandro Estrada-Esparza
College Futures Monterey County Fund	UC Davis	20180692	3,500	Ailine Flores Hernandez
College Futures Monterey County Fund	UC Davis	20180704	3,500	Ariana Selene Espinoza Lopez
College Futures Monterey County Fund	UC Davis	20180690	3,500	Adriana Jazmin Vargas Mendoza
College Futures Monterey County Fund	UC Davis	20180689	2,500	Adrian Gutierrez
College Futures Monterey County Fund	UC Davis	20180786	3,000	Jonathon Zamora
College Futures Monterey County Fund	UC Davis	20180698	3,500	Anderson Dang
College Futures Monterey County Fund	UC Davis	20180709	3,500	Cristal Diana Calderon
College Futures Monterey County Fund	UC Davis	20180734	3,500	Maria Teresa Camargo
College Futures Monterey County Fund	UC Davis	20180803	3,000	Rodrigo Andres Garcia
College Futures Monterey County Fund	UC Davis	20180747	3,500	Thomas Telles
College Futures Monterey County Fund	UC Davis	20180701	3,500	Andrea Ramos
College Futures Monterey County Fund	UC Davis	20180733	2,500	Maria Fernanda Zuniga
College Futures Monterey County Fund	UC Davis	20180780	3,000	Jacob R Perez
Monica Abbott Scholarship Fund	UC Davis	20180682	1,000	Esther Martinez
College Futures Monterey County Fund	UC Davis	20180762	3,000	Brisa Gisselle Perez
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180848	2,000	Ailine Flores Hernandez
Alan and Rita Shugart Scholarship Fund	UC Davis	20180955	4,000	Iris Cristel Arvizu Quiroz
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180847	2,000	Adriana Jazmin Vargas Mendoza
The Morse Foundation Scholarship Fund	UC Davis	20180940	5,000	Megan Zoller
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180904	2,000	Victoria Ramirez De Jesus
Drezner Family Scholarship Fund	UC Davis	20180834	10,000	Jose Camacho Rodriguez
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180887	2,000	Melissa Velasquez Zavala
Drezner Family Scholarship Fund	UC Davis	20180835	10,000	Leah Edwards
The Nan Borreson and Fred Terman Scholarship Fund	UC Davis	20180961	2,500	Christian Ortiz
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180853	2,000	Ariana Selene Espinoza Lopez

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Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180885	2,000	Marielena Ramirez
Hugo and Dolores Tottino Family Scholarship Fund	UC Davis	20180965	2,500	Daniel Villa Salazar
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180899	2,000	Stefanie Ruelas-Quiroz
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180871	2,000	Hilary Paola Medel
Girls' Health in Girls' Hands Scholarship Fund	UC Davis	20180850	2,000	Ana Karen Viridiana Topete Gonzalez
Charles Joseph Watts Scholarship Fund	UC Davis	20180972	1,000	Thomas Nance Stephens
The Morse Foundation Scholarship Fund	UC Hastings College of Law	20180937	5,000	Maria Lupita Lopez
Carmel Valley Women's Club Foundation Scholarship Fund	UC Irvine	20180833	1,000	Rebecca Goren
Girls' Health in Girls' Hands Scholarship Fund	UC Irvine	20180876	2,000	Jessica Esmeralda Godinez Moran
College Futures Monterey County Fund	UC Irvine	20180713	3,500	Daria Iris Garcia-Morales
Raymond H. Costa Family Scholarship Fund	UC Los Angeles	20180816	5,000	Belen Sarai Torres
College Futures Monterey County Fund	UC Los Angeles	20180695	3,500	Alondra Urena
College Futures Monterey County Fund	UC Los Angeles	20180781	3,000	Jacqueline Madrigal-Espinoza
College Futures Monterey County Fund	UC Los Angeles	20180745	3,500	Sandy Martinez Garcia
Shelley Watts Scholarship Fund	UC Los Angeles	20180969	900	Trinidad Berenice Morales-Garza
Kristopher Pallastrini Fund	UC Los Angeles	20180951	600	Coral Rose Sunshine Barrett
Girls' Health in Girls' Hands Scholarship Fund	UC Los Angeles	20180897	2,000	Shania Ann Sitko
Girls' Health in Girls' Hands Scholarship Fund	UC Los Angeles	20180907	2,000	Zena Lababidi
Girls' Health in Girls' Hands Scholarship Fund	UC Los Angeles	20180906	2,000	Xitclalli Ramirez
Carmel Valley Women's Club Foundation Scholarship Fund	UC Los Angeles	20180828	3,000	Coral Rose Sunshine Barrett
Girls' Health in Girls' Hands Scholarship Fund	UC Los Angeles	20180872	2,000	Isela Perez
Girls' Health in Girls' Hands Scholarship Fund	UC Los Angeles	20180873	2,000	Jacqueline Madrigal-Espinoza
Rotary Club of Monterey Martin/Hurd Scholarship Fund	UC Los Angeles	20180916	5,000	Jenai Lillian Blazina
Horace H. Wilson Scholarship Fund	UC Merced	20180974	2,000	Karina Hernandez
Girls' Health in Girls' Hands Scholarship Fund	UC Merced	20180869	2,000	Guadalupe Camacho-Garcia
Girls' Health in Girls' Hands Scholarship Fund	UC Merced	20180862	2,000	Diana Garcia
Girls' Health in Girls' Hands Scholarship Fund	UC Merced	20180879	2,000	Karina Ramirez
College Futures Monterey County Fund	UC Merced	20180739	3,500	Odalys Mendoza
College Futures Monterey County Fund	UC Merced	20180775	3,000	Gerardo Daniel Garcia
College Futures Monterey County Fund	UC Riverside	20180804	3,000	Ruben Castro Corral
College Futures Monterey County Fund	UC Riverside	20180717	5,000	Eloy Rodriguez Cruz
College Futures Monterey County Fund	UC San Diego	20180730	3,500	Kimberly Torres Ochoa
Rotary Club of Monterey Martin/Hurd Scholarship Fund	UC San Diego	20180911	5,000	Robert Valencia
Girls' Health in Girls' Hands Scholarship Fund	UC Santa Barbara	20180852	2,000	Andrea Villegas
Girls' Health in Girls' Hands Scholarship Fund	UC Santa Barbara	20180890	2,000	Naudia Velarde
Girls' Health in Girls' Hands Scholarship Fund	UC Santa Barbara	20180855	2,000	Bertha Viridiana Avina Lopez
The Nan Borreson and Fred Terman Scholarship Fund	UC Santa Barbara	20180962	2,500	Elein Clara

Community Foundation for Monterey County

Grants - April 1, 2018 - May 31, 2018

Girls' Health in Girls' Hands Scholarship Fund	UC Santa Barbara	20180860	2,000	Daniela V. Alcaraz
Rotary Club of Monterey Martin/Hurd Scholarship Fund	UC Santa Barbara	20180915	5,000	Freda Lababidi
Rotary Club of Monterey Martin/Hurd Scholarship Fund	UC Santa Barbara	20180914	5,000	Elena Samaria Leuma-Burks
Dr. Roger and Kate Bartels Memorial Scholarship Fund	UC Santa Barbara	20180683	500	Christopher Bart DiMaggio
College Futures Monterey County Fund	UC Santa Barbara	20180727	3,500	Jose de Jesus Gonzalez-Herrera
College Futures Monterey County Fund	UC Santa Barbara	20180702	3,500	Angelica Ruiz
College Futures Monterey County Fund	UC Santa Barbara	20180703	3,500	Apolinar De Jesus De Jesus
College Futures Monterey County Fund	UC Santa Cruz	20180789	3,000	Linda Rocha Montejano
Girls' Health in Girls' Hands Scholarship Fund	UC Santa Cruz	20180882	2,000	Linda Rocha Montejano
Hausdorf Family Scholarship Fund	UC Santa Cruz	20180909	8,000	Suzette Segoviano-Quiroz
Rotary Club of Monterey Martin/Hurd Scholarship Fund	UC Santa Cruz	20180912	5,000	Dalanna Anh Nguyen
The Morse Foundation Scholarship Fund	University of Alaska Fairbanks	20180925	5,000	Emelia Manniello
Alan and Rita Shugart Scholarship Fund	University of Pennsylvania	20180956	4,000	Quincy Thomas Hendricks
Kier Memorial Scholarship Fund	University of the Pacific	20180918	1,000	Felix Amando Diaz Contreras
Bill Clapper Memorial Music Scholarship Fund	University of Washington	20180812	1,000	Noah Peralta Prado
Charles Joseph Watts Scholarship Fund	University of Southern California	20180970	1,000	Carson Samuel Caulk
Charles Joseph Watts Scholarship Fund	University of Southern California	20180971	1,000	Cristian Manuel Chavez
Dr. Gladys M. Olvis Scholarship Fund	University of Southern California	20180950	1,000	Jessica Lizeth Esparza Del Toro
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180538	1,000	Miriam de la Cruz Ahedo
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180536	1,000	Alexandra Gitomer
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180539	1,000	Reina Trombetta
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	Monterey Peninsula College	20180540	1,000	Haley Rappa
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund	UC Santa Cruz	20180537	1,000	Linda Rocha Montejano
Dr. William D. Barr Scholarship Fund for Excellence in Educational Leadership	Santa Cruz County Office of Education	20180534	575	Dr. William D. Barr Award for Excellence in Educational Leadership
Matthew Paul Finnigan Memorial Scholarship Fund	Chapman University	20181011	1,500	Erica Wynne
Matthew Paul Finnigan Memorial Scholarship Fund	Chapman University	20181010	500	Stephen Hinkle
Matthew Paul Finnigan Memorial Scholarship Fund	CSU Long Beach	20181012	500	Brianna Wilbon
Dr. Gladys M. Olvis Scholarship Fund	Memorial University of Newfoundland	20180531	1,000	Jacob Buote for the Dr. Gladys M. Olvis Scholarship
		Total	1,061,775	
Interfund Grants				
The Fred Terman and Nan Borreson Fund	Community Foundation for Monterey County	20180507	5,000	TERM to TERMS
Marsha McMahan Zelus Fund	Community Foundation for Monterey County	20180523	5,000	ZELUS to WOMN1
Cappy Martin/Vernon Hurd Monterey Rotary Club Fund	Community Foundation for Monterey County	20181016	40,800	HURD to HURD2 for 2018 Scholarships

Community Foundation for Monterey County

Grants - April 1, 2018 - May 31, 2018

Marta L. Bennett Fund	Community Foundation for Monterey County	20180587		500	BENNT to OPER
Birt and Kathleen Johnson, Jr. Fund	Community Foundation for Monterey County	20180583		500	JOHN to GHGH
Ausonio Family Fund	Community Foundation for Monterey County	20180480		3,500	AUSO to OPER
Fuqua Family Foundation Fund	Community Foundation for Monterey County	20181008		500	FUQUA to CFMCF
Sarah and Robert Bouchier Fund	Community Foundation for Monterey County	20180582		350	BOUCH to GHGH
Rick and Tonya Antle Fund	Community Foundation for Monterey County	20180514		5,000	ANTL to GHGH
Dan Baldwin and Anne Ylvisaker Fund	Community Foundation for Monterey County	20180581		250	DBAY to ANTL
Ben and Mary Ann Whitten Fund	Community Foundation for Monterey County	20180504		1,000	WHIT to GHGH
The Harles R. Sarment College Endowment	Community Foundation for Monterey County	20180572	①	105,000	College Futures Monterey County 2018
The Morse Foundation Stewardship Fund	Community Foundation for Monterey County	20180975	②	91,867	MORSS to MORSE for 2018 Scholarships
General Endowment Fund of the Community Foundation	Community Foundation for Monterey County	20181049		100	GEN to GHGH
		Total		259,367	
		Grand Total - 609 Grants, Totaling		4,053,354	
① Grants approved by the Board on April 24, 2018					
The Harles R. Sarment College Endowment	Community Foundation for Monterey County	20180572	①	105,000	College Futures Monterey County 2018
② Grants approved by the Executive Committee					
Katherine Curtis Springer Fibromyalgia and Chronic Fatigue Syndrome Patient Support Fund	Salinas Valley Memorial Hospital Foundation	20181009	②	77,203	Medical expenses for patients diagnosed w/Chronic Fatigue, Fibromyalgia, Gulf War Syndrome
Farrell/Allen/LaSalle Carmel Rotary Fund	The Rotary Club of Carmel-by-the-Sea Foundation	20180997	②	130,000	initially funding the Rotary Club of Carmel-by-the-Sea Foundation; represents scholarships budgeted for Rotary year 2016-17 totaling \$60,000 and for Rotary year 2017-18 totaling \$70,000
The David and Lucile Packard Foundation Fund	CHISPA	20180993	②	65,000	the 2018-2019 Salinas Youth Initiative: \$55,000 for program and small capital and \$10,000 for technical assistance
The David and Lucile Packard Foundation Fund	City of Salinas	20180995	②	55,000	the 2018-2019 Salinas Youth Initiative: for the Salinas Public Library; \$55,000 for program and small capital
The David and Lucile Packard Foundation Fund	Restorative Justice Partners, Inc.	20180994	②	52,475	the 2018-2019 Salinas Youth Initiative: \$40,000 for program and small capital and \$12,475 for technical assistance
The Morse Foundation Stewardship Fund	Community Foundation for Monterey County	20180975	②	91,867	MORSS to MORSE for 2018 Scholarships
The Buffett Fund	Oregon Shakespeare Festival	20180658	②	100,000	to support the production of "Mother Road" for the 2019 season
Lori and Lou Flagg Memorial Youth Fund	Boys & Girls Clubs of Monterey County	20180513	②	111,000	capital maintenance and improvements, including fixing the leaking roof and skylights and installing a solar energy system



**Community Impact Children & Youth Grant Subcommittee Minutes
May 24, 2018**

Present: Betsy Buchalter Adler, Birt Johnson, Bill Mitchell, Paulette Bumbalough, Meg Clovis, Oscar Flores, Sharon Gish, Mark Verbonich, Trinidad Gomez

Staff: Laurel Lee-Alexander, Josh Warburg, Erika Matadamas

The meeting of the Children & Youth Grant Subcommittee of the Community Foundation for Monterey County was called to order by Betsy Buchalter Adler, Committee Chair, at 11:30 AM on May 24, 2018.

Grant Proposal Review – Recommendations to the Board

The committee reviewed the attached list of grant proposals. The voting members of the committee unanimously agreed via email (see attached) to these grant recommendations, including denials to the following applicants.

- Alisal Center for the Fine Arts
- Cesar Chavez Futbol Academy (CCFA)
- Community Information Center
- Foundation of CSUMB
- Future Citizens Foundation
- Monterey Jazz Festival
- Panetta Institute for Public Policy
- Turning Point of Central California, Inc.

Committee members shared the following conflict of interest:
Sharon Gish: Central Coast YMCA (former CEO), Partners for Peace (current consultant)

Having no further business, the meeting was adjourned at 2:00 PM.

Minutes prepared by:

Josh Warburg, Program and Scholarships Officer

Approved by:

Betsy Buchalter Adler, Board Member and Children & Youth Grant Subcommittee Chair

Josh Warburg

From: Meg Clovis <meclovis@outlook.com>
Sent: Saturday, May 26, 2018 10:57 AM
To: Josh Warburg
Subject: RE: Thank You

Hi Josh:
I approve.
Meg Clovis

Sent from [Mail](#) for Windows 10

From: Josh Warburg <joshw@cfmco.org>
Sent: Friday, May 25, 2018 3:46:21 PM
To: Birt Johnson; bill@carmelrealtycompany.com; paulette.bumbalough@gmail.com; meclovis@outlook.com; oscar@first5monterey.org; lisa@first5monterey.org; slgish@aol.com; verbonichm@aol.com; studio788@gmail.com; Betsy Buchalter Adler
Subject: RE: Thank You

Dear Grants Committee,

It turns out that we are not done with business yet. We did not have a formal vote at the meeting to approved the grants. Please respond to this email with your vote to approve the attached slate of grants that the committee arrived at on Thursday May 24.

Sincerely,

Josh Warburg
Program and Scholarships Officer
Community Foundation for Monterey County
2354 Garden Road, Monterey, CA 93940
831.375.9712 x127 / joshw@cfmco.org / www.cfmco.org
www.facebook.com/cfmco / www.twitter.com/cfmco

Read the [CFMC blog](#) or follow us on [Facebook](#)

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



From: Josh Warburg
Sent: Friday, May 25, 2018 10:50 AM
To: Birt Johnson <birtjohnson@yahoo.com>; 'bill@carmelrealtycompany.com' <bill@carmelrealtycompany.com>; 'paulette.bumbalough@gmail.com' <paulette.bumbalough@gmail.com>; 'meclovis@outlook.com' <meclovis@outlook.com>; 'oscar@first5monterey.org' <oscar@first5monterey.org>; 'lisa@first5monterey.org' <lisa@first5monterey.org>; 'Sharon Gish' <slgish@aol.com>; verbonichm@aol.com; 'studio788@gmail.com'

Josh Warburg

From: Oscar Flores <oscar@first5monterey.org>
Sent: Tuesday, May 29, 2018 8:19 AM
To: Josh Warburg; Paulette Bumbalough
Cc: Birt Johnson; bill@carmelrealtycompany.com; meclovis@outlook.com; Lisa Luis; slgish@aol.com; verbonichm@aol.com; studio788@gmail.com; Betsy Buchalter Adler; Janet Shing; Karina Gutierrez-Barboza; Laurel Lee-Alexander
Subject: Re: Thank You

Follow Up Flag: Follow up
Flag Status: Flagged

Hope you all had a great weekend!

I approve also.

Thanks all. Great to see you all. I always learn so much from each and everyone of you.

Get [Outlook for Android](#)

From: Paulette Bumbalough
Sent: Saturday, May 26, 11:23 AM
Subject: Re: Thank You
To: Josh Warburg
Cc: Birt Johnson, bill@carmelrealtycompany.com, meclovis@outlook.com, Oscar Flores, Lisa Luis, slgish@aol.com, verbonichm@aol.com, studio788@gmail.com, Betsy Buchalter Adler, Janet Shing, Karina Gutierrez-Barboza, Laurel Lee-Alexander

I approve. Thanks for all the work by Josh and staff.

On Fri, May 25, 2018 at 10:49 AM, Josh Warburg <joshw@cfmco.org> wrote:

Thank you again for all of the effort you put into reading, rating, providing comments, going on site visits, and thoughtfully deliberating on grant decisions. Your work and input is critical to this program and the foundation's mission to strengthen communities throughout Monterey County.

Please make sure our fall meetings are on your calendar:

Nov 8, 11:30 AM to 1:00 PM (Historic Preservation) in [Monterey - 2354 Garden Road, Monterey, CA 93940](#)
Nov 15, 11:30 AM to 2:00 PM (Arts and Culture) in Salinas – [945 Main Street Suite 207, Salinas, CA 93901](#)

Reminder: Community Foundation's board will review your grant recommendations at its meeting in late June. We will share the funding decisions with you.

Feel free to contact me if you have any questions or suggestions for improvement. Thanks again.

Sincerely,

Josh Warburg
Program and Scholarships Officer

Josh Warburg

From: Sharon Glsh <slgish@aol.com>
Sent: Friday, May 25, 2018 4:46 PM
To: Josh Warburg
Subject: RE: Thank You

I vote yes.

Sharon Glsh

831-594-0148

From: Josh Warburg [mailto:joshw@cfmco.org]
Sent: Friday, May 25, 2018 3:46 PM
To: Birt Johnson <birtjohnson@yahoo.com>; bill@carmelrealtycompany.com; paulette.bumbalough@gmail.com; meclovis@outlook.com; oscar@first5monterey.org; lisa@first5monterey.org; slgish@aol.com; verbonichm@aol.com; studio788@gmail.com; Betsy Buchalter Adler <bba93950@icloud.com>
Subject: RE: Thank You

Dear Grants Committee,

It turns out that we are not done with business yet. We did not have a formal vote at the meeting to approved the grants. Please respond to this email with your vote to approve the attached slate of grants that the committee arrived at on Thursday May 24.

Sincerely,

Josh Warburg
Program and Scholarships Officer
Community Foundation for Monterey County
2354 Garden Road, Monterey, CA 93940
831.375.9712 x127 / joshw@cfmco.org / www.cfmco.org
www.facebook.com/cfmco / www.twitter.com/cfmco

Read the [CFMC blog](#) or follow us on [Facebook](#)

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



From: Josh Warburg
Sent: Friday, May 25, 2018 10:50 AM
To: Birt Johnson <birtjohnson@yahoo.com>; 'bill@carmelrealtycompany.com' <bill@carmelrealtycompany.com>; 'paulette.bumbalough@gmail.com' <paulette.bumbalough@gmail.com>; 'meclovis@outlook.com' <meclovis@outlook.com>; 'oscar@first5monterey.org' <oscar@first5monterey.org>; 'lisa@first5monterey.org'

Josh Warburg

From: Birt <birtjohnson@yahoo.com>
Sent: Saturday, May 26, 2018 8:30 AM
To: Josh Warburg
Cc: bill@carmelrealtycompany.com; paulette.bumbalough@gmail.com; meclovis@outlook.com; oscar@first5monterey.org; lisa@first5monterey.org; slgish@aol.com; verbonichm@aol.com; studio788@gmail.com; Betsy Buchalter Adler
Subject: Re: Thank You

Josh,

I approve.

Birt Johnson

Sent from my iPad

On May 25, 2018, at 3:46 PM, Josh Warburg <joshw@cfmco.org> wrote:

Dear Grants Committee,

It turns out that we are not done with business yet. We did not have a formal vote at the meeting to approved the grants. Please respond to this email with your vote to approve the attached slate of grants that the committee arrived at on Thursday May 24.

Sincerely,

Josh Warburg
Program and Scholarships Officer
Community Foundation for Monterey County
2354 Garden Road, Monterey, CA 93940
831.375.9712 x127 / joshw@cfmco.org / www.cfmco.org
www.facebook.com/cfmco / www.twitter.com/cfmco

Read the [CFMC blog](#) or follow us on [Facebook](#)

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

<image001.png>

From: Josh Warburg
Sent: Friday, May 25, 2018 10:50 AM
To: Birt Johnson <birtjohnson@yahoo.com>; 'bill@carmelrealtycompany.com' <bill@carmelrealtycompany.com>; 'paulette.bumbalough@gmail.com' <paulette.bumbalough@gmail.com>; 'meclovis@outlook.com' <meclovis@outlook.com>; 'oscar@first5monterey.org' <oscar@first5monterey.org>; 'lisa@first5monterey.org' <lisa@first5monterey.org>; 'Sharon Gish' <slgish@aol.com>; 'verbonichm@aol.com' <studio788@gmail.com>; 'studio788@gmail.com' <studio788@gmail.com>; Betsy Buchalter Adler <bba93950@icloud.com>
Cc: Janet Shing <janet@cfmco.org>; 'karinagb@cfmco.org' <karinagb@cfmco.org>; Laurel Lee-Alexander

Josh Warburg

From: T Gomez <studio788@gmail.com>
Sent: Friday, May 25, 2018 5:06 PM
To: Betsy Buchalter Adler
Cc: Bill Mitchell; Josh Warburg; Birt Johnson; paulette.bumbalough@gmail.com; meclovis@outlook.com; oscar@first5monterey.org; lisa@first5monterey.org; slgish@aol.com; verbonichm@aol.com
Subject: Re: Thank You

I approve. Happy holiday.
Trinidad

On Fri, May 25, 2018 at 4:27 PM, Betsy Buchalter Adler <bba93950@icloud.com> wrote:

I approve. And thanks, Josh, for catching and fixing my error in not asking the committee to approve the spreadsheet before we adjourned. Happy weekend, all!

Betsy

On May 25, 2018, at 4:24 PM, Bill Mitchell <mitch@mitchellgroup.com> wrote:

Josh,
I approve.
Thank you, and have a nice Memorial Day weekend.

Bill Mitchell
Managing Director
Carmel Realty Company
Bill@CarmelRealtyCompany.com
Tel (831) 624-3355
Cell (831) 277-9932
BRE#00479008

On May 25, 2018, at 3:46 PM, Josh Warburg <joshw@cfmco.org> wrote:

Dear Grants Committee,

It turns out that we are not done with business yet. We did not have a formal vote at the meeting to approved the grants. Please respond to this email with your vote to approve the attached slate of grants that the committee arrived at on Thursday May 24.

Sincerely,

Josh Warburg

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
20181054	Boys & Girls Clubs of Monterey County	Teen Centers Capital Project	Countywide	\$50,000		\$25,000	\$25,000
20181055	Central Coast YMCA	Youth Fit For Life	Multiple	\$25,000		\$20,000	\$20,000
20181056	Greenfield Community Science Workshop	After-school, hands-on science enrichment programs	Multiple	\$25,000		\$25,000	\$25,000
20181057	Community Partnership for Youth	After-school mentor-tutor prevention program	Multiple	\$35,000	\$300	\$29,700	\$30,000
20181058	Epicenter of Monterey	Youth-led community center serving foster youth	Countywide	\$25,000	\$500	\$19,500	\$20,000
20181059	Foundation for Monterey County Free Libraries	General operating support	Countywide	\$30,000	\$1,500	\$23,500	\$25,000
20181060	Girl Scouts of California's Central Coast	Girl Scout Leadership Experience	Countywide	\$30,000		\$25,000	\$25,000
20181061	Girls Incorporated of the Central Coast	Leadership and youth development programs	Salinas Valley	\$40,000		\$25,000	\$25,000
20181062	Hartnell College Foundation	K-12 STEM Program expansion	Multiple	\$50,000		\$30,000	\$30,000
20181063	MPC Foundation	Outdoor Learning Classroom at Early Childhood Education Lab School	Multiple	\$25,000	\$1,500	\$22,400	\$23,900
20181064	Partners For Peace	Parent Project facilitator training	Countywide	\$32,927		\$20,000	\$20,000
20181065	Raising A Reader	Early childhood and family literacy program	Countywide	\$25,000	\$1,800	\$18,200	\$20,000
20181066	Read to Me Project	Prevention-based pre-literacy programs	Countywide	\$35,000	\$500	\$24,500	\$25,000
20181067	Restorative Justice Partners, Inc.	Restorative Justice in the Schools	Countywide	\$30,000	\$500	\$19,500	\$20,000
20181068	The Village Project, Inc.	Mae C. Johnson Education and Cultural Enrichment Program	Seaside & Marina	\$25,000	\$300	\$24,700	\$25,000

Totals **\$482,927** **\$6,900** **\$352,000** **\$358,900**

Number of Grants **15**

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
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Average Size of Grants

\$23,927

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
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Small Community Impact Grants (approved by President/CEO)

20180588	Kidpower Teenpower Fullpower	'Starting Strong' student safety program for migrant children in Monterey County	Countywide	\$12,000		\$10,000	\$10,000
20180591	Life Is For Everyone, Inc. [LIFE]	After-school program	Salinas	\$12,000		\$12,000	\$12,000
20180589	OLINGA LEARNING	Wings of Knowledge STEM Program	Countywide	\$12,000		\$12,000	\$12,000
20180590	Positive Discipline Community Resources	Parenting for Strong Communities in Monterey County	Countywide	\$12,000		\$10,000	\$10,000
20180593	Seniors Council	Foster Grandparent Program in Monterey County	Countywide	\$12,000		\$12,000	\$12,000
20180594	Silicon Valley Education Foundation	Elevate [Math] program in Salinas and Soledad	Multiple	\$12,000	\$2,000	\$10,000	\$12,000
20180592	The Wahine Project	El Proyecto de Wahine Sur	Salinas Valley	\$12,000		\$10,000	\$10,000

\$84,000 \$2,000 \$76,000 **\$78,000**

TOTAL CY \$436,900

TOTAL HHS 611,000

Total Spring 2018 \$1,047,900



**Community Impact Health & Human Services Grant Subcommittee Minutes
May 23, 2018**

Members Present: Ida Lopez Chan, Betsey Pearson, Kathie Cain, Patricia Gomez and by phone, Kim Bui-Burton and Bill Sharpe

Members Excused: Sandy Hale

Staff: Laurel Lee-Alexander, Erika Matadamas and Janet Shing

The meeting of the Health & Human Services Grant Subcommittee of the Community Foundation for Monterey County was called to order by Ida Lopez Chan at 11:30 AM on May 23, 2018.

Grant Proposal Review – Recommendations to the Board

The committee reviewed the attached list of grant proposals. On a motion by Kathie Cain, seconded by Patricia Gomez, the voting members of the committee unanimously agreed to these grant recommendations, including denials to the following applicants.

- Action for Healthy Kids
- American Heart Association
- Community Human Services
- Hospice Giving Foundation
- Franciscan Workers of Junipero Serra (collaborative application)
- Legal Services for Seniors

Having no further business, the meeting was adjourned at 1:26 PM.

Minutes prepared by:

Janet Shing, Director of Grantmaking

Approved by:

Ida Lopez Chan, Board Member and Health & Human Services Grant Subcommittee Chair

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
20181029	Big Sur Health Center	Healthcare services	Big Sur	\$35,000	\$5,000	\$20,000	\$25,000
20181026	Big Sur Marathon Foundation	JUST RUN Youth Fitness Program	Countywide	\$20,000		\$15,000	\$15,000
20181033	Monterey County Rape Crisis Center	Child Abuse Prevention Education Program	Countywide	\$25,000		\$25,000	\$25,000
20181019	Natividad Medical Foundation	5 Steps to Prevent Diabetes	Salinas, Salinas Valley	\$30,000		\$25,000	\$25,000
2081034	Planned Parenthood Mar Monte	Clinical operating funds for Seaside and Salinas health centers	Peninsula, Salinas	\$40,000	\$1,000	\$25,000	\$26,000
20181031	RotaCare Bay Area, Inc.	RotaCare Monterey, a free medical clinic for those who have the greatest need and the least access	Peninsula	\$25,000	\$500	\$19,500	\$20,000
20181028	Salud Para La Gente	Children's Dental Disease Prevention and Treatment Program, Monterey County	North County, Salinas	\$25,000	\$500	\$24,500	\$25,000
20181038	Sun Street Centers	Safe Teens Empowerment Project (drug/alcohol prevention)	Peninsula, Salinas, Salinas Valley	\$50,000	\$500	\$29,500	\$30,000
20181035	Access Support Network	Housing stability and homeless prevention for people living with HIV in Monterey County	Countywide	\$48,000		\$48,000	\$48,000
20181032	Aspiranet	Short-term housing and visitation program children removed from the home	Countywide	\$30,000		\$20,000	\$20,000
20181040	CASA of Monterey County	Court-Appointed advocacy for Monterey County's most vulnerable foster youth	Countywide	\$40,000	\$1,000	\$24,000	\$25,000

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
20181030	Central Coast Center for Independent Living	Increasing independence for people with disabilities	Countywide	\$35,000		\$25,000	\$25,000
20181027	Catholic Charities of the Diocese of Monterey	CalFresh outreach, enrollment, and case management in Monterey County	Salinas, Peninsula, Salinas Valley	\$50,000		\$20,000	\$20,000
20181037	United Way MC	2-1-1 information and referral Services	Countywide	\$25,000		\$15,000	\$15,000
20181039	Coalition of Homeless Services Providers	General operating support	Countywide	\$15,000		\$15,000	\$15,000
20181022	Food Bank for Monterey County	Emergency Supplemental Food Assistance	Countywide	\$50,000	\$3,000	\$27,000	\$30,000
20181042	Franciscan Workers of Junipero Serra	'Bridge over Barriers' immediate, proactive intervention for homeless adults waiting for assistance	Salinas	\$50,000		\$30,000	\$30,000
20181023	Interim, Inc.	Shelter Cove - unit remodel	Countywide	\$50,000		\$20,000	\$20,000
20181025	Alliance on Aging	Assistance to seniors in navigating services and benefits	Countywide	\$50,000		\$35,000	\$35,000
20181020	Alzheimer's Disease and Related Disorders Association	Alzheimer's education and support in Monterey County	Countywide	\$30,000	\$1,500	\$18,500	\$20,000
20181024	Health Projects Center	Del Mar Caregiver Resource Center	Countywide	\$50,000		\$25,000	\$25,000
20181036	Independent Transportation Network MC	Transportation for seniors and visually impaired adults	Peninsula, Salinas	\$25,000	\$1,000	\$14,000	\$15,000
20181021	Meals on Wheels of the Monterey Peninsula	Home-delivered meal program	Peninsula	\$25,000	\$2,000	\$18,000	\$20,000

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
20181041	Meals on Wheels of the Salinas Valley	Home-delivered meal program	Salinas Valley	\$35,000		\$25,000	\$25,000

Totals **\$858,000** **\$16,000** **\$563,000** **\$579,000**

Number of Grants **24**

Average Size of Grants **\$24,125**

Grant #	Organization Name	Purpose of Request	Geographic Region	Request Amount	DA	Comm Rec	TOTAL
Small Community Impact Grants (approved by President/CEO)							
20180595	Carmel Foundation	Meal programs for seniors	Peninsula	\$10,000		10,000	10,000
20180597	Coastal Kids Home Care	In-home nursing and therapy for children with illness and disability	Countywide	\$10,000	\$500	\$9,500	\$10,000
20180596	Kinship Center	Recruitment of foster and adoptive parents	Countywide	\$12,000	\$500	\$11,500	\$12,000
				\$32,000	\$1,000	\$31,000	\$32,000
						TOTAL HHS	\$611,000
						TOTAL CY	436,900
						Total Spring 2018	\$1,047,900

**Community Foundation for Monterey County
 APPLICATIONS RECOMMENED for DENIAL
 Community Impact Grants: Spring Cycle 2018**

Organization	Amount	Proposed Project	Reason for Denial
Children and Youth			
Alisal Center for the Fine Arts	\$30,000	After-School Homework Center	Weak proposal, organizational capacity
Cesar Chavez Futbol Academy (CCFA)	\$40,000	Soccer program providing college support services	Limited funding
Community Information Center	\$35,000	Computer classes for Spanish-speaking parents	Weak proposal, organizational capacity
Foundation of CSUMB	\$20,000	Monterey County College and Career Readiness Initiative	Fit
Future Citizens Foundation	\$20,000	After-school and school break enrichment programs	Limited funding
Monterey Jazz Festival	\$25,000	Monterey Jazz in the Schools Program	Fit
Panetta Institute for Public Policy	\$20,000	Monterey County Reads	Limited funding
Turning Point of Central California, Inc.	\$20,000	Empowerment, Employment and Education Program	Weak proposal, fit

**Community Foundation for Monterey County
 APPLICATIONS RECOMMENED for DENIAL
 Community Impact Grants: Spring Cycle 2018**

Organization	Amount	Proposed Project	Reason for Denial
Children and Youth (CI SMALL)			
El Camino Real Futbol League	\$12,000	General operating support	Weak proposal, organizational capacity, fit
EternityWorks DBA Youth N.O.W.	\$12,000	After-school academic and social/emotional support for youth in Pajaro	Limited funding
King City Boxing Club	\$6,000	Boxing activities for youth	Weak proposal, organizational capacity, limited funding
Lyceum of Monterey County	\$12,000	Expanding Your Horizons conference and career fair	Weak proposal, organizational capacity
Marina Youth Arts	\$10,000	Media Arts after-school program at Marina High School	Weak proposal, organizational capacity, fit
Monterey Bay Salmon & Trout Project, Inc.	\$11,671	Salmon & Trout Education Program	Fit
Silicon Valley Monterey Bay Council, Boy Scouts of America	\$12,000	General operating support	Weak proposal, ineligible
Ventana Wilderness Alliance	\$12,000	Youth in Wilderness outdoor education program	Weak proposal, fit

**Community Foundation for Monterey County
APPLICATIONS RECOMMENED for DENIAL
Community Impact Grants: Spring Cycle 2018**

Organization	Amount	Proposed Project	Reason for Denial
Health and Human Services			
Action for Healthy Kids	\$25,000	Healthy eating and physical activity program	Weak proposal
American Heart Association	\$26,800	Blood pressure education and monitoring program	Weak proposal, organizational capacity, limited funding
Franciscan Workers of Junipero Serra	\$50,000	Collaborative multi-disciplinary mental health counseling and case management to end homelessness	Limited funding
Community Human Services	\$25,000	Homeless Youth Mentoring Program	Fit
Hospice Giving Foundation	\$40,000	Outreach & Education for End-Of-Life Care Services, Resources & Planning	Weak proposal, limited funding
Legal Services for Seniors	\$30,000	Legal services for seniors in crisis	Ineligible

Health and Human Services (CI SMALL)			
Ag Against Hunger	\$12,000	Harvest Program	Organizational capacity, fit
Blind & Visually Impaired Center of Monterey	\$12,000	Marjorie R. McNeely Low Vision Clinic	Weak proposal, limited funding
Grower-Shipper Association Foundation	\$9,375	Salad Bars in Schools needs assesment	Weak proposal, fit
Housing Resource Center of Monterey County	\$12,000	Rapid Re-housing Program	Weak proposal, fit
Jacob's Heart Children's Cancer Support Services	\$8,500	"BRAVE" practical and emotional aid to families whose child has been diagnosed with cancer	Fit
Papillon Center for Loss and Transition	\$5,000	Good Grief for Kids and Teens	Organizational capacity, fit