



Here for Good

Community Foundation
for Monterey County

ENGAGING

for Good

ANNUAL REPORT 2018

HERE

for Good





ENGAGING FOR GOOD

You know an organization is on solid footing when new levels of success are expected each year. 2018 was no different. We granted a record \$18.7 million. Community Foundation for Monterey County (CFMC) donor advisors are more active than ever, utilizing their funds to make significant investments into Monterey County. Scholarship funding took another huge leap to \$1.3 million with the help of many new partnerships. While investment markets didn't do us any favors, especially at the end of the year, the CFMC experienced robust giving. The generosity of Monterey County residents continually amazes us.

Perhaps the true sign of the CFMC's maturity is that we measure ourselves – our effectiveness and impact – in new ways. 2018 saw the advent of our Community Impact Investment program, in which we invested a small portion of our long-term portfolio in community development finance organizations who will then loan our capital to start-up farmers or women entrepreneurs. The portfolio receives a guaranteed return on these placements. Or our Center for Nonprofit Excellence's Next Steps for Small Nonprofits, which finished year two of a three-year program to help small and emerging nonprofits gain capacity and expertise that will be vital elements of their sustainability. And there is the largely behind-the-scenes community leadership work in areas of homelessness, affordable housing, the 2020 Census and support of many of our community's vital nonprofits. This confluence of philanthropy and community impact was eloquently tied together in Leon and Sylvia Panetta's Distinguished Trustee acceptance remarks at the annual Celebration of Philanthropy.

None of this happens without a committed, engaged board of directors and staff. The energy, intellect and passion that goes into the successes of your community foundation are possible because of the people who work at it every day. Healthy nonprofits have strong boards and great staffs, recognizing best practices and appropriate boundaries. Working as partners. Perhaps the primary driver is our sense of responsibility to the stewardship of assets, the honoring of each donor's intent and our commitment to leveraging these resources into maximum benefit for Monterey County. In other words, we are driven by our desire to build "Healthy, Safe, Vibrant Communities." We are *Here for Good*.

We hope you'll enjoy reading how we worked to accomplish this in 2018.



Ken Petersen
2018 Board Chair



Daniel R. Baldwin
President/CEO



“

The drop-in program gives youth and families free access to a community-oriented science learning and making space right in the heart of downtown Greenfield, after school and on the weekends.”

—JOSÉ SÁNCHEZ
GREENFIELD COMMUNITY
SCIENCE WORKSHOP (right)



ENGAGING FOR IMPACT GRANTMAKING

The CFMC awarded record grants of \$18.7 million in 2018, and has awarded \$185 million in cumulative grantmaking since 1981. Competitive grant requests are reviewed by a grant committee or staff. Others are carefully recommended by a donor advisor, or directed through the Monterey County Gives! year-end campaign. This care and attention helps create impact from North to South County, inland to the coast, for young and old.

As a community foundation, we make grants in diverse areas to nonprofits doing great work in health and human services, children and youth development, arts, culture and historic preservation, community development, the environment, animal welfare, education and disaster relief.

Grants have expanded the Monterey County Symphony's Music in the Schools program into Salinas, assisted RotaCare's medical clinic for the underinsured in Seaside, brought STEM classes through the science workshop to Greenfield, and supported watershed ecology education from North County to Gonzales through the Pacific Grove Museum of Natural History.

\$18.7 million
granted

\$185 million
since 1981

746 grantees

countywide
impact & beyond

The Next Steps for Small Nonprofits program through the CFMC's Center for Nonprofit Excellence offered capacity building grants plus operating support to help local nonprofits fulfill their missions. And the CFMC was chosen by The James Irvine Foundation to invest \$1.25 million to strengthen local leadership in Salinas. The Neighborhood Grants program supported grassroots groups with small grants to boost their ability to bring programs to their communities.

Grants from field of interest funds focus on a particular cause, such as the Fund for Homeless Women, which topped \$1 million in cumulative grants in 2018, and The Anita Tarr Turk Fund which awarded three two-year grants for breast cancer research. Scholarships nearly doubled. A record \$1.3 million was awarded to 375 recipients.

Whether it's supporting our neighbors through programs or services, or helping a student fulfill their dreams of higher education, the CFMC seeks to make the most impact possible through its grantmaking. Thanks to our generous donors past and present, we strengthened communities throughout Monterey County like never before.

“

We are proud to support our community through our diverse grantmaking programs and appreciate the positive impact of our nonprofit partners.

— LAUREL LEE-ALEXANDER
VICE PRESIDENT OF GRANTS
AND PROGRAMS

”



ENGAGING COMMUNITY

www.cfmco.org/MCgives

MONTEREY COUNTY GIVES!

Anyone can be a philanthropist. It's a big word, yet giving at all levels makes a meaningful difference to causes and organizations people care about. In 2018, Monterey County Gives! brought new donors together with creative ideas from nonprofits – engaging an entire community around a central theme of giving. It has provided a roadmap of increased generosity, demonstrating the strength of our local philanthropic spirit.

2018 was the most successful year since Monterey County Gives! began in 2009 – raising a record \$5.4 million for the 169 participating nonprofits. Since inception, \$22 million has been raised and granted.

The campaign was successful not only in financial terms, but also in giving each nonprofit a chance to share stories of their work directly with residents of Monterey County. The Monterey County Weekly's annual MC Gives! insert contains each organization's "Big Idea." So, if you live in Castroville, you'll read about arts programs

in King City, or if you live in Gonzales, you'll learn what the Natividad Hospital Foundation is doing to help babies thrive in the neonatal unit.

MC Gives! connects communities. It energizes us to do our part – with gifts big and small – because in the end, it improves our sense of connectedness and because, it feels good to give!

MC Gives! is a partnership of the Monterey County Weekly, the CFMC and the Monterey Peninsula Foundation. The program has grown stronger thanks to sponsors Neumeier Poma Investment Counsel, the David and Lucile Packard Foundation, Colburn and Alana Jones Foundation of the CFMC and the Cannery Row Company. We also thank the Donald McEnry Davis Charitable Fund, Doolittle Fund, Fuqua Family Foundation, Peter and Jackie Henning Fund, Huth Family Fund, Dr. James Valentine Fund, Alexander F. Victor Foundation and Ben and Mary Ann Whitten Fund, all donor advised funds of the CFMC, for their contribution to the match.

record
\$5.4 million
raised

\$22 million
since inception in 2009

\$1.49 million
in matching
funds & challenge gifts

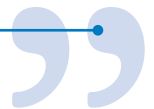
169
participating nonprofits

4,710 donors



People give because they want to know folks are being fed, the environment is being cared for, homeless people have shelter, children are learning to read and the arts are thriving.

- DAN BALDWIN
PRESIDENT/CEO





ENGAGING DONORS

JOEL AND DENA GAMBORD

Joel and Dena Gambord are full of life and their vitality and excitement are reflected in their passion for giving. The Gambords, who reside in Pebble Beach, met in the San Jose area and have been married for 46 years. Joel and Dena's families were hardworking. "We came from families that were not able to give. We are the first generation to do so and we see the rewards," said Dena. "We've been very fortunate. In planning our legacy, we made sure our kids were OK and then found we had a little left over," Joel added.

The Gambords support many local nonprofits and were looking for a partner to help them create a giving plan for the future. They were drawn to the reputation of the Community Foundation for Monterey County and in 2013 they created the Joel and Dena Gambord Charitable Foundation, a donor advised fund of the CFMC. They started with grants to service dog organizations and now support the training of search and rescue dogs to be paired with firefighters or police as a search and rescue team, certified by FEMA.

The Gambords giving philosophy is "cause and effect philanthropy." They want to see the direct impact of their giving. By attending the graduations of their support dogs and their human pairing they get great satisfaction in seeing the results of their investments.

Their other giving priority is providing nursing scholarships for students at California State University, Monterey Bay (CSUMB). They created the Joel and Dena Gambord Nursing Scholarship Fund at the Community Foundation with the mission to expand the training of nurses to a higher professional level from RN to Bachelor of Science degrees and to Physician Assistants and Nurse Practitioners.

They met with nursing students, many of whom had financial barriers such as child care costs, and learned first-hand the difference scholarships could make in furthering their careers. "These are amazing people and their success will give more people access to better health care," noted Dena. The hope is that many students after achieving their advanced degrees will stay locally and make a difference in our community."

The Gambord's philanthropic vision is evolving. They worked with Dan Baldwin and Christine Dawson at the CFMC to set up a structure and giving plan through a planned gift through their estate to fulfill their wishes in the future. They will support people not only in health care careers but in trade schools as well. They also plan to support the arts, especially organizations involved with photography, Joel's passion, and animal rescue.

And they are involving their family. "We're trying to look into the future and create a structure that will last. We've got our children involved now and in the future our grandchildren and great grandchildren can be involved depending on their interests. We hope they will carry on with our priorities but we've built flexibility into the plan so family members will be able to modify the focus of giving in a way we can't possibly foresee at this time," Joel explained.

"We're happy to have set up our plan at CFMC. We trust the people there to carry out our wishes and work harmoniously with our family members in the future. Joel and I are just ordinary people who have been very fortunate and we hope to make a difference – to leave things a little better than when we arrived here," added Dena.

We hope to leave things a little better than when we came.
Our giving has evolved to include our family, that's icing on the cake.

- JOEL AND DENA GAMBORD



ENGAGING STUDENTS SCHOLARSHIPS

Ismael Rocha (center, left) says his parents had only one goal for him - "Study hard so I wouldn't end up in the fields." But studying hard and getting into college presented another glaring reality many students face – figuring out how to pay for it. "When I saw the prices, I knew that it would be nearly impossible for my parents to pay for college, rent, and to provide for my three other siblings," said Ismael, a King City High School graduate.

Then Ismael learned about College Futures Monterey County, a CFMC program in partnership with the College Futures Foundation, which offers comprehensive support in addition to scholarships. Students are offered workshops about college prep requirements, completing applications, financial aid forms and even budgeting.

"One of the best things I could ever ask for was when Esther Figueroa, the student support specialist, came to King City High School and told us about the scholarship. I applied and ended up earning it. I am the first person in my family to attend college. My brother, Allen, is already following in my footsteps."

College Futures is engaging students to make their college dreams a reality. In 2018, 600 Monterey County students attended CFMC-sponsored workshops at seven schools from King City to Salinas to Seaside. And college is a reality for nearly 130 student thanks to College Futures scholarships, which totaled \$434,500.

Ismael now attends CSUMB where he is studying kinesiology, yet still finds time to volunteer as a track and field coach at King City High School. He hopes to become a Physical Education teacher. He's found a special friendship and mentorship in donors Steve and Marti Diamond, CFMC fund holders and scholarship supporters, who he met at a summer workshop. He recognizes the connection between donors like the Diamonds and the scholarship helping him reach his goals.

"They are some of the nicest and most humble people I have ever met, and they also shared lots of knowledge and great advice that I took to heart. It's people like them that make the scholarship possible, and they are investing in our education without knowing who we are or what we plan to do in college."

This is just one student's success story. The CFMC manages more than 52 named scholarship funds, each with a unique purpose and vision.

I can't thank the scholarship donors enough for giving to the best foundation ever, because it truly helps us students succeed and takes some weight off our shoulders.

– ISMAEL ROCHA

COLLEGE FUTURES SCHOLARSHIP RECIPIENT, CSUMB STUDENT

awarded

375

scholarships totaling

\$1.3 million

(increase from 225
totaling 750,000 in 2017)

oversees

52

scholarship funds
totaling

\$8.2 million

CFMC received a

\$750,000

2-year renewal grant
from College Futures

Foundation for
scholarships and
support



ENGAGING WOMEN & GIRLS

WOMEN'S FUND

The Women's Fund is in full stride, sustaining programs which grow leadership in young women and helping them fulfill their college aspirations, while expanding its focus to leadership, advocacy and policy change.

For the second year, the fund made it possible for four women to attend the Women's Policy Institute of the Women's Foundation of California. They built advocacy skills and worked on public policies to help low-income women achieve economic security.

The Women's Fund is addressing human trafficking in Monterey County, by providing support for Rising International's Safe & Sound education and prevention program to be taught in local high schools. Co-founded and taught by trafficking survivors, it's becoming a national model.

Girls' Health in Girls' Hands (GHGH), a girl-led movement for health empowerment created by the Women's Fund, continues to thrive. Everett Alvarez High School graduate Celeste Islas is one strong, confident voice of that

power. Involved in GHGH since her sophomore year she enthusiastically embraced leadership roles. "I had a safe place to eat and stay during lunch and practice skills I needed for personal development," she shared as a speaker at the 2018 Women's Fund Luncheon.

President of the National Honor Society with a 4.3 GPA, Celeste had 18 acceptance offers for college admission. She now attends University of California, Berkeley joining her two aunts, GHGH alumnae Lilybeth and Bella Chavez, who also received Women's Fund scholarships. Celeste was one of 61 Women's Fund scholarship recipients in 2018. All previous recipients who applied in 2018 had their scholarships renewed.

The Women's Fund is a catalyst for change, addressing critical issues, leadership and advocacy, health empowerment, economic security and educational advancement. With the strong support of Women's Fund donors, it will continue to meet future needs and create pathways for women and girls.

Where we are is in a moment of real awakening – we are in a time when women and girls of all ages are stepping into their own personal power.

– SARA HIRSH BORDO

FOUNDER AND FILMMAKER OF WOMEN RISING
KEYNOTE SPEAKER 2018 WOMEN'S FUND LUNCHEON

granted
\$2.1 million
since 2001

\$1.8 million
endowment
to meet
challenging needs

awarded
61
scholarships
totaling
\$121,000 (2018)

OUR VALUES

ADVANCE

positive change

EMBRACE

inclusivity &
diversity

STRIVE

for excellence

**OPEN
&
HONEST**

OPERATE

with the highest
standards of
integrity, ethics &
accountability

BUILD

a legacy for future
generations

COMMIT

to fairness &
respect

ENGAGING IN LEADERSHIP

A TRUSTED VOICE

Grantmaker. Convener. Changemaker. The Community Foundation for Monterey County has a unique ability and opportunity to bring people together to address Monterey County's challenges. When a study showed that 75% of Monterey County high school students aspire to attend college, but only 33% are prepared, the CFMC took on the challenge of changing those numbers. The CFMC partnered with the College Futures Foundation to launch College Futures Monterey County – a college readiness program that comprised a large part of the \$1.3 million in total scholarships awarded in 2018.

When The James Irvine Foundation was looking for a partner to implement its priority funding for a civic engagement and community leadership project in Salinas, it sought out the Community Foundation for Monterey County because of the CFMC's deep local knowledge.

And when homeless service providers needed a neutral party to break through the complicated web of agencies and issues, the CFMC stepped in and helped motivate organizations to become aligned around a shared vision.

The CFMC has also taken action around advocating and providing funding for affordable housing, working for an accurate count in Monterey County in the 2020 Census and allocating CFMC financial resources to spur economic opportunities through community impact investing.

Leadership goes beyond grantmaking and convening. CFMC staff members have leadership roles in Monterey County and beyond. Christine Dawson is a board member of Association of Fundraising Professionals, Monterey Bay. Janet Shing is a Steering Partner for Bright Futures Monterey County. Laurel Lee-Alexander is a member of the Community Foundation National Standards board and Dan Baldwin is Past Chair of the League of California Community Foundations and a member of the National Community Foundation Public Awareness Initiative Steering Committee.

Central to the CFMC's vision of creating "Healthy, Safe, Vibrant Communities," the CFMC is using its voice, values and position as community leader as a force for good.

Affordable
Housing

Strategic
Grantmaking

Homelessness

Needs-Based
Scholarships

“

Dan Baldwin has been key in getting cities and nonprofits... to work on addressing homelessness and getting a shelter on the Peninsula on a possible track.

— LUIS ALEJO
MONTEREY COUNTY SUPERVISOR,
DISTRICT 1

”

ENGAGING DIVERSE INTERESTS

SIEMBRA LATINOS FUND



Siembra Latinos Fund
OF THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Indigenous youth leadership in Greenfield. Digital Literacy in Gonzales. Multi-cultural art classes in Seaside. Diabetes prevention throughout the county. The Siembra Latinos Fund (SLF) is supporting diverse programs and empowering Latinos throughout Monterey County.

And it's made possible by its efforts to engage diverse donors. A fund of the CFMC, created to inspire giving by and for Latinos, the SLF granted more than \$20,000 in 2018 to nonprofits serving the Latino community.

"Siembra" means "to sow," and the fund seeks to grow opportunity for Latinos in Monterey County. The Siembra Latinos Fund invests in the great work taking place by Latinos as leaders and changemakers.

It is guided by a local advisory board and engages Latinos in giving for good. The fund aims to invest in organizations that create opportunities for local Latinos to achieve their fullest potential.

The Siembra Latinos Fund is field of interest fund of the Community Foundation for Monterey County.



Dan Baldwin (l) with Siembra Latinos Advisory Board Members Chris Barrera, Ida Lopez Chan (Co-Chair), Blanca Zarazua (Chair), Daniel Rodriguez, Jose Luis Alvarado, Raul Rodriguez. (Not pictured: Elsa Mendoza Jimenez, Erica Padilla Chavez, Lorraine Yglesias)/Photo David Royal

We want to grow the tradition of giving to help the Latino community thrive.

- IDA LOPEZ CHAN
SIEMBRA LATINOS ADVISORY MEMBER
AND CFMC BOARD MEMBER

mission

"To inspire giving by
Latinos for Latinos"

vision

"Healthy, Safe and Engaged
Latino communities"

awarded seven grants totaling

\$20,000
(2018)

1 of 10

members of the
National Latino Funds Alliance



www.cfmco.org/SLF



Coastal Kids Home Care provides counseling and other services to children and families

NORTHERN MONTEREY COUNTY
COMMUNITY FOUNDATION

GRANTEE: COASTAL KIDS HOME CARE

The Northern Monterey County Foundation (NMCF) is making a difference in North Monterey County. The NMCF awarded more than \$35,000 to 14 organizations serving the communities of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita.

A young Prunedale boy and his family faced end-of-life and NMCF grantee Coastal Kids Home Care, California’s only nonprofit pediatric home health agency, provided social work support and bereavement counseling to his mom and siblings. With the support of the NMCF, children living with illness, and those facing the end-of-life, receive excellent in-home care and their parents find peace of mind.

serving Northern
Monterey County
communities

awarded \$35,500
to 14 projects and programs

\$57,000
in its first two years



www.cfmco.org/NMCF



Monterey County Agricultural & Rural Life Museum shares the Salinas Valley’s rich ag history through exhibitions and hands-on experiences

SOUTHERN MONTEREY COUNTY
COMMUNITY FOUNDATION

GRANTEE: MONTEREY COUNTY
AGRICULTURAL & RURAL LIFE MUSEUM

The Southern Monterey County Foundation (SMCF) provides grant funding for a variety of community-based services aimed at improving the quality of life for Southern Monterey County residents.

More than 350 South County 4th graders had a day full of art, history and music at Monterey County Agricultural & Rural Life Museum annual History Jamboree at San Lorenzo County Park in King City. They panned for gold in a sluice box, made a gold collection pouch, sampled hard tack at the covered cook wagon and sang camp songs at the gold miners tent. A grant from the SMCF supported the program.

serving King City to
points South

granted \$21,000
to 17 nonprofits

\$93,000
to 27 projects and programs
in it’s first five years



www.cfmco.org/SMCF

ENGAGING FOR GOOD

GRANTMAKING HIGHLIGHTS



Fund for Homeless Women grantee I-HELP serves local women nightly



Tu Puedes King City helps their neighbors get healthy

Providing Shelter and Support FUND FOR HOMELESS WOMEN

The Fund for Homeless Women granted \$230,000 to seven nonprofits in 2018, passing the \$1 million milestone of grants awarded since its inception. The fund assists groups serving unsheltered women who live on the Monterey Peninsula.

Grants supported emergency assistance, meals, clothing, safe parking, shelter and housing as well as case management services. Organizers also hold monthly meetings to raise awareness and educate the community.

Small Grants, Big Impact NEIGHBORHOOD GRANTS PROGRAM

Small grants make a big impact for grassroots groups working to improve their communities. The Neighborhood Grants Program supports volunteer-led groups who organize everything from cultural and after school sports, to activities for seniors and special needs support groups.

Members of Tu Puedes King City gather each morning to get their exercise – dancing and involving their children too young to go to school. The grant helps bring community members together to improve mental and physical health. That’s just one way the group is working to help their neighbors.

field of interest fund founded
2012

awarded **\$230,000**
to 7 nonprofits in 2018

\$ 1,149,110
in cumulative grantmaking
43 grants to 11 nonprofits



www.cfmco.org/FHW

www.fundforhomelesswomen.org

started in **1997**

\$50,000 granted
to 15 community groups in 2018

\$1,025,000
cumulative grantmaking



www.cfmco.org/NGP



Building Healthy Communities empowers youth in Salinas

Strengthening Leadership

JAMES IRVINE FOUNDATION

The James Irvine Foundation aims to boost civic engagement and development of regional leaders. They are investing \$1.25 million through the CFMC to build resident engagement in Salinas. Ten organizations supporting working class families are participating in a pilot program including coaching and multi-year operating support to build organizational strength and increase civic participation.

18-month regranting program
to grow local leaders in Salinas

\$375,000 granted
to 9 nonprofits (2018)

\$1.25 million
invested

coaching, capacity building and
mentoring



www.cfmco.org/Irvine



Monterey Peace and Justice Center board members work to strengthen their organization

Building Capacity

NEXT STEPS FOR SMALL NONPROFITS

Next Steps helps smaller nonprofits (with budgets under \$150,000) fulfill their missions. Grantee Monterey Peace and Justice Center (MPJC) aims to inspire and mobilize the people of Monterey County to cultivate peace, social justice, nonviolence, democracy and environmental sustainability. "Next Steps is giving our board education on how to really organize ourselves to reach our ambitious goals of educating the public," said Joyce Vandevere, MPJC board member.

3-year
program to support
smaller nonprofits

Up to **\$18,000/year**
to 9 nonprofits

coaching
capacity building and mentoring



www.cfmco.org/NextSteps



“

The Community Foundation’s investment is critical to our ability to say ‘Yes’ when determined entrepreneurs come to us for funding to pursue their dreams.”

- LUZ URRUTIA
CEO, OPPORTUNITY FUND

ENGAGING CAPITOL COMMUNITY IMPACT INVESTING

The Community Foundation for Monterey County undertook a new approach to investing its capital by creating the Community Impact Investment program. This approach makes a difference beyond grantmaking by leveraging philanthropic capital for social good. In its first year, \$1.75 million was directed to two area Community Development Financial Institutions (CDFIs), which make loans to create economic opportunity and growth for small businesses.

A portion of the funds that would otherwise be held in traditional investments will create loans to boost economic development, opportunity and growth for small businesses in Monterey County. The money will be repaid to the foundation with interest, growing the CFMC's philanthropic resources while helping to fulfill part of the foundation's mission - to strengthen communities.

The CFMC placed \$1 million with Opportunity Fund which makes loans to small business owners who don't have access to traditional financial resources. They believe that small

amounts of money and financial advice can help people make permanent and lasting change, drive economic mobility and build stronger communities.

This investment will help business owners like Manuel Lopez (left), who needed a small business loan to purchase new equipment for his auto repair shop, Lopez Automotive. He successfully repaid his loan and used additional financing from Opportunity Fund to help purchase tools and install a fence around the shop grounds. In 2018 Opportunity Fund provided 36 loans totaling \$814,000 in Monterey County.

The CFMC also invested \$750,000 with California FarmLink, which links independent farmers and ranchers with land and financing. It provides one-on-one technical assistance, workshops, connections, and resources to support farmers who would otherwise have difficulty securing financing. During 2018, California FarmLink made 26 farm loans totaling more than \$1.5 million in Monterey County.

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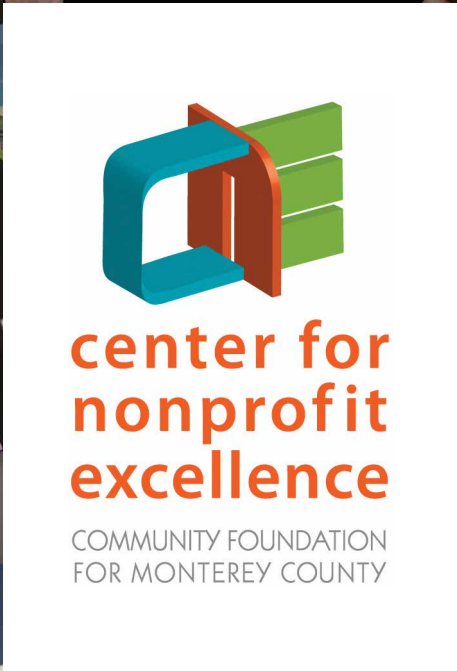
We're excited to improve the lives of our neighbors through investments in these two organizations. It's a win-win.

— DAN BALDWIN
CFMC PRESIDENT/ CEO

”

developed
Community Impact
Investment Policy & Committee

invested
\$1.75 million
in 2 CDFIs:
• California FarmLink
• Opportunity Fund



ENGAGING NONPROFITS

CENTER FOR NONPROFIT EXCELLENCE

The Center for Nonprofit Excellence (CNE) offers numerous opportunities for nonprofit staff and boards to build their organization's effectiveness. Through workshops, consulting and networking resources, hundreds of participants are better able to fulfill their missions each year.

Both the Next Steps for Small Nonprofits and The James Irvine Foundation Salinas pilot programs use the CNE model of grantmaking plus capacity building for a cohort of grantees. This approach provides multi-year, unrestricted grants plus a menu of other services focused on organizational strengthening.

Professional consultants who serve as coach/mentors are a key part of the program, supporting the grantees throughout the grant period. Participants complete an assessment of their organization, develop a plan to strengthen capacity over time, plus take part in training and peer learning.

The CNE has successfully implemented six such projects in the last 12 years. Participating nonprofits often report stronger organizational structures, larger and more effective boards, more diverse and sustainable funding sources and expanded staff. They also develop a learning culture where efforts to strengthen the organization become a regular part of planning and activities. This methodology has been so successful it was adopted by other grantmakers including the David and Lucile Packard Foundation.

Another highlight of the CNE's multifaceted work is support for nonprofit executives. The CNE sponsored an Executive Director learning community for the past five years and in 2018 offered several opportunities for local executive directors to recharge and refresh, support one another, and gain tools for wellbeing and effective leadership.

The CNE engages area nonprofits by seeking input and feedback through an annual survey. By responding to concerns and shaping its programs based on the nonprofit community's needs, the CNE seeks to help organizations better serve the people of Monterey County.

196

nonprofits engaged with CNE

21

organizations
utilized 3 or more CNE services

45

Executive Directors
took advantage of one or more offerings
to support resilient leaders

57

nonprofits have
benefited from the grantmaking "plus"
mentoring model (2006-2018)

“

The funding and consultation kept us focused on our capacity building goals, which strengthened our infrastructure and allowed us to take on new risks. We've been able to grow our programs, staffing, and impact.

—SHERRY FLUMERFELT
MONTEREY BAY FISHERIES TRUST

”

OUR FAMILY OF FUNDS

The CFMC holds more than 500 funds created by individuals, families and businesses. Funds can be established to benefit specific organizations, causes, geographic areas, scholarships or unrestricted to respond to changing needs. The CFMC is a steward of both the charitable assets entrusted to us and each donor's philanthropic vision.

Affiliate Funds

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

Northern Monterey County Foundation
Southern Monterey County Foundation

Agency Endowment Funds

Nonprofit agencies benefit from participation in the CFMC's investment pools, help with planned giving, and grow their sustainability.

39 Craftsmen Fund for Monterey County Youth Museum
All Saints' Day School Endowment Fund
Bishop Kip Fund for All Saints' School
The Gloria S. Daly Endowment Fund for All Saints' Episcopal Day School
Hester Hyde Griffin Fund for All Saints' Day School
Laurie Boone Hogen Appreciation Fund for Excellence in Teaching
Alliance on Aging Endowment Fund
Alzheimer's Association of Monterey County
Big Sur Health Center Endowment Fund
The Big Sur Land Trust Conservation Fund
Blind and Visually Impaired Center Fund
The Boys and Girls Club of the Monterey Peninsula Fund

Friends of the Carmel Valley Library Fund
Carl Cherry Center for the Arts Fund
Carmel Music Society Endowment Fund
Carmel Woman's Club Fund
Carmel Woman's Club Scholarship Endowment Fund*

Casa Amesti Foundation Building Endowment Fund
David Allen Bernahl II, Local Heroes Fund for CASA
Center for Photographic Art Fund
Chamber Music Monterey Bay Fund
Chartwell School Scholarship Endowment Fund
Children's Services International Fund
Colleagues of the Arts Endowment Fund
Community Partnership for Youth Fund
Carmel Public Library Foundation Fund
Carmel Public Library Foundation - Children's Fund
Elkhorn Slough Foundation, Inc. Fund
Fred Farr & Edwin Bliss Buckeye Memorial Fund
Fenton Founders' Fund for Youth Music Monterey
Director Emeritus Richard Tyler Scholarship Award
Food Bank for Monterey County Endowment Fund
Friends of the Salvation Army Monterey Peninsula Fund
Girl Scouts of California's Central Coast Endowment Fund

Goodwill Industries of Santa Cruz, Monterey and San Luis Obispo Counties Fund
Health Projects Center Fund
Interim, Inc. Mental Illness Endowment Fund
Kinship Center Fund
Legal Services for Seniors Endowment Fund
LULAC Council # 2055 Fund
Lyceum Founders' Fund in Memory of Vera Hering and Claire Kennedy
Foundation for Monterey County Free Libraries - General Endowment Fund
Foundation for Monterey County Free Libraries - Dallas Shaffer Book Fund
Monterey County Free Libraries - Staff Development Fund
Meals on Wheels of the Monterey Peninsula Fund
Eve Mills Memorial Fund for Meals on Wheels Salinas Valley
Meals on Wheels of Salinas, Inc. Fund
Monterey County Historical Society Fund
Monterey History and Art Association Endowment Fund
Monterey Museum of Art Fund
Monterey Public Library Fund
MPC Women Supporting Women Endowment Fund
Museum Foundation of Pacific Grove Fund
Natividad Medical Foundation Fund
Danny Nugent Memorial Campership Fund
Ombudsman for Long-Term Care Fund
Jack O'Neill and Harry Hind Endowment Fund
Operating Endowment Fund
Orchestra in the Schools Endowment Fund
Nellie Irons Orr Scholarship Fund
Pacific Repertory Theatre Endowment
Project Helping Hand Fund
Rancho Cielo Endowment Fund*
Salinas Rodeo Rotary Club Foundation Agency Endowment Fund 2

Shelter Outreach Plus Fund
SPCA of Monterey County Fund
St. Timothy Foundation, Inc. Fund
Sunset Theater Endowment Fund
Sylvia W. Schwarz Endowment for Reading Improvement at Tularcitos School
Robinson Jeffers Tor House Fund
Tularcitos Parent Teacher Organization Fund
United Way of Monterey County Fund
Ventana Trails Forever Fund
Ventana Wilderness Alliance Fund
Ventana Wildlife Society Fund
The Western Stage Endowment Fund
York School Fund
Youth in Wilderness Fund

Agency Stewardship Funds

Agencies benefit from participation in the CFMC's investment portfolios, and retain access to the fund's principal.
1984 Fund
Friends of the Andy Ausonio Library Stewardship Fund
Big Sur Health Center Stewardship Fund
Big Sur Land Trust Carmel River FREE Stewardship Fund
Friends of Carmel Forest Stewardship Fund
Carmel Heritage Society Stewardship Fund
Carmel Woman's Club Stewardship Fund
CASA of Monterey County Stewardship Fund
Stewardship Fund for the Center for Photographic Arts
Central Coast for Independent Living Stewardship Fund*
Chamber Music Monterey Bay Stewardship Fund
CHISPA Stewardship Fund
Church in the Forest Stewardship Fund
Community Human Services Stewardship Fund
Conservancy for the Range of the Condor*
Carmel Valley Kiwanis Foundation Stewardship Fund

➤ Monterey Fireman's Charitable Association Fund of the CFMC; Siembra Latinos Fund launch



Friends of the Carmel Valley Library Stewardship Fund
Del Monte Forest Conservancy Fund
Girls Inc. Stewardship Fund
Harmony at Home Ending Violence & Building Families Stewardship Fund*
International School of Monterey Foundation Stewardship Fund
Jacob's Heart Children's Cancer Support Services Stewardship Fund
Japanese American Citizens League of Monterey Peninsula Stewardship Fund
Kernes Adaptive Aquatics Stewardship Fund
Kinship Center Stewardship Fund**
LandWatch Monterey County Stewardship Fund
Sun Street Centers' Anne C. Leach Scholarship Fund
Legal Services for Seniors Stewardship Fund
Friends of the Marina Library Stewardship Fund
Meals on Wheels of the Salinas Valley Stewardship Fund
Methodist Foundation of Pacific Grove Stewardship Fund
Monterey County Pops Stewardship Fund
Operating Reserve Stewardship Fund
Park It! Stewardship Fund*
Peace of Mind Dog Rescue Stewardship Fund
Pacific Grove Public Library Foundation Fund
Pacific Grove Public Library Fund for the Future
Museum Foundation of Pacific Grove Stewardship Fund
Rancho Cielo Youth Stewardship Fund
Monterey County Rape Crisis Center Stewardship Fund
Maury Richmond Scholarship Stewardship Fund*
Learning Opportunities Endowment Fund for Scottish Fiddlers of California
Shelter Outreach Plus Stewardship Fund

Sarah Spencer Seed Money Fund for the Center for Photographic Art
Sun Street Centers Stewardship Fund
Friends of Sunset Foundation Stewardship Fund
Salinas Valley Memorial Hospital Foundation Stewardship Fund
Temple Beth El Stewardship Fund
United Way Monterey County Stewardship Fund
United Way Monterey County Stewardship Fund II
United Way Monterey County Stewardship Fund III*
Central Coast Veterans Cemetery Foundation Stewardship Fund
Visiting Nurses Association and Hospice Stewardship Fund II
Central Coast VNA and Hospice, Inc. Stewardship Fund
Central Coast Young Men's Christian Association Stewardship Fund
Youth Music Monterey Stewardship Fund*
Company Funds
Businesses simplify their giving and receive tax advantages and customized support to maximize their community philanthropy.
The Carmel Realty Foundation
Monterey County Weekly Community Fund
Mission Ranches Fund
Monterey Pacific Company Fund*
Nepenthe/Phoenix Corporation Fund
Taylor Farms Scholarship Fund*
Church Brothers-True Leaf Farms Scholarship Fund
Designated Funds
Donors can support a designated agency or agencies over time with a permanent, protected stream of operating income.
Pauline and John Anderson Fund
William S. and Janice R. Anderson Fund

Arts Council for Monterey County Endowment Fund
Tony P. and Marjorie Ayres Fund
Nancy Parker Benham Endowment Fund
Central Coast Lighthouse Keepers Fund
Cislini Fund
Howard and Lynn Classen Endowment
de Guigne Fund
Frances Elgan & Werner Kunkel Fund
Howard W. and Elva M. Elliott Trust Fund
The Herman Fletcher Fund
A Fork in the Road-A Fund
Providing a Path to a Science Career
Rudolph E. Futer Designated Fund
John Gill ALS Patient Support Fund
Rodney & Betty Guilfoil Fund
The Hudson Fund
Ward D. and Mary T. Ingram Fund
Bob Jones Boy Scout Camping Fund
The William Kiepora Fund
Jack and Patricia Kilmartin Fund
Sandy Loiacono Scholarship Fund
John H. Marble Endowment Fund
Jane P. McKay Endowment Fund for the Big Sur Land Trust Fellowship Program
Jane P. McKay Endowment Fund for Door to Hope
Jane P. McKay Endowment Fund for the Hartnell College Foundation Counselors' Grants Program
MBD Fund**
Joyce Morris Fund
Monterey County Symphony Association Fund
Margaret L. Musser Restricted Fund
Perry-Downer House Fund
Anne Thorpe Memorial Fund**
Maud Porter Work Rose Garden Fund
Carl Young Memorial Earth Science Endowment Fund
YWCA Endowment Fund

Donor Advised Funds
Donors recommend grants from their fund to support nonprofit organizations and work with CFMC staff to create a meaningful philanthropic legacy.
22 Love Fund
Zekai and Carolyn Akcan Fund
Amy Anderson and George Somero Fund
Anonymous Donor Temporary Fund
Friends of Community Animal Services Fund
Antle Family Fund**
Rick and Tonya Antle Fund
Joey & Dewitt Astin Memorial Fund*
Ausonio Family Fund
Dan Baldwin and Anne Ylvisaker Fund
Bareuther Family Foundation
Peggy Downes Baskin Fund for Women's Reentry
Lino and Teri Belli Family Fund
The Benjamin Family Foundation
Marta L. Bennett Fund
Sarah and Robert Bouchier Fund
Howard Franklin Bowker Numismatic Projects Endowment Fund
Bright Futures Fund
The Brown Family Fund
Buccafurni-Lawrence Fund
Buchalter/Adler Family Fund
The Buffett Fund
Josephine Bunn Fund
Weston Call Fund for Big Sur*
Casa Amesti Garden and House Fund
Chappellet Youth, Arts, and Ecology Fund
Chris's Fund
Cormorant Fund
Scott Corwon Fund
Cynthia Snorf Fund
Andrew & Phyllis D'Arrigo Fund
D'Arrigo-Martin Fund
Stephen V. Davies Family Fund*
Donald McEnry Davis Charitable Fund
Eric and Ila Davis Fund
Ila Davis Fund
Dekker Davidson Foundation
Marcia F. DeVoe Fund
DeWitt Fund

▼ Catherine and Ray Costa, Raymond H. Costa Family Scholarship Fund of the CFMC; Big Sur Fire Relief check ceremony



- Marti and Steve Diamond
Charitable Foundation Fund

Martin and Nancy Dodd Fund

Helen R. Doe Fund

Doolittle Fund

Jean and Jim Duff Fund

Eimer/Cartwright Fund

Howard and Karin Evans Fund

Davis Factor, Jr. and Christine B. Factor Fund

Farrell/Allen Carmel Rotary Fund

Farrell/Allen/LaSalle Carmel Rotary Fund

Doris Parker Fee Fund

Doris Parker Fee Fund #2

Ted Fehring Family/Carmel Host Lions Club Fund

Ted Fehring Family/Carmel Host Lions Club Fund #2

Jose F. Fernandez Fund

Monterey Firemen's Charitable Association Fund

Lori and Lou Flagg Memorial Youth Fund

Fuhs Family Foundation Fund

Fuqua Family Foundation Fund

Tom and Mary Kay Gallagher Fund

Gerosin Fund

Global Student Leadership Fund*

Gloria Fund

Trinidad and Lupe Gomez Family Fund

Jessica Govea-Thorbourne Memorial Fund

Tom Grainger Memorial Fund

Harlan and Barbara Hall Fund

Dr. Adriana Hayward Fund

The Peter and Jackie Henning Fund

Joseph and Elizabeth Heston Family Foundation

Hicks Fund for the Arts

The Ann Mayer Hiller Memorial Fund

Elmer G. and William G. Hitchcock Fund

Mary and Peter Hobley Memorial Fund

Hodges Family Fund

Jeanne Smith-Holmquist Fund

Chip Hooper Foundation

David G. Huey and Carla S. Hudson Family Fund*

Hughes-Rivera Family Fund*

Huth Family Fund

Janzen Family Fund

Birt and Kathleen Johnson, Jr. Fund

Colburn and Alana Jones Foundation

Leslie B. Kadis, MD & Ruth McClendon Foundation Fund

Kadushin Robinson Fund

F.B. and B.H. Keith Fund

Karen M. and Brendan P. Kelly Fund

Steven D. Kesselring and Jean M. Forrest Fund

Jack and Patricia Kilmartin Fund

Kobrinisky Evans Family Fund

The Kohn Family Theatre and Arts Fund

Phyllis Geer Krystal Fund

Barbara Paul and Tom LaFaille Fund

The Landreth Family Fund

James and Susan Lansbury Fund

Jefferson and Frances Larkey Memorial Fund

Lee-Alexander Family Fund

Lehman Family Fund

Phyllis and Herbert Lister Fund

Live and Glve Fund **

Valera Whitford Lyles Fund

MacGowan Pathwanderer Fund

John and Kristina Magill Fund

Mahoney/Peterson Family Fund

The Marcus Family Fund

The Marcus Family Fund #2

Cambrel B. Marshall Fund

Cappy Martin/Vernon Hurd Monterey Rotary Club Fund

McHenry Family Fund*

Kim and Steve McIntyre Fund*

McMahan Family Fund

Catherine L. and Robert O. McMahan Fund

Marjorie McNeely Fund for the Blind or Illiterate

Richard and Grace Merrill Fund

Lenore and Dale Meyer Fund

Malcolm and Joanne Millard Fund

James I. and Barbara S. Miller Charitable Fund

Clint and Karen Miller Charitable Fund**

Mills Family Fund

Tim and Cindy Minor Charitable Giving Fund

William and Patricia Monahan Fund

Monterey Peninsula Sunrise Rotary Club Fund

Anthony and Lary Lynn Muller Fund

Joan Ann Nattress - Movement, Exercise, Longevity Fund*

Neidel Family Fund

Gilbert M. Neill Math Fund

Neumeier Taylor Foundation Fund*

Nonella Family Fund

Don Nucci Fund for the Salinas Valley

F. Robert Nunes Family Fund

Oak Hill Charitable Fund

Mike and Mary Orradre Fund

Overett Family Fund

Pagnillo Family Fund

Nicholas M. Pasculli Fund

Reed Family Fund*

Reese Family Fund

California Rodeo Salinas Fund*

John and Anette Romans Family Fund**

Rotary Club of Monterey, Cannery Row Fund

The Fred Rowden Memorial Fund

RSH Fund

Salinas Rodeo Rotary Club Fund

Salinas Rotary Club Fund

Fund for the Salinas Valley

The James M. Shade Memorial Fund

Will and Mary Shaw Fund

Shelley Family Fund

Ramsey Shirk Fund

Richard and Cindy Zoller Silver Family Legacy Fund*

Matthew Simis and Michael Gray Fund

Laura Sinks Fund

Andy and Steffanie Smith Fund

Kendall and Kathryn Smith Family Fund

The Snorf Fund

Steck Family Fund

Salinas Steinbeck Rotary Club Fund

Robert and Leslie Taylor Fund

Gary and Emma Taylor Fund

The Fred Terman and Nan Borreson Fund

Peter and Anne Thorp Fund

Jim and Linda Tunney Fund*

Tyler Visiting Fellowship in Residence Fund

William H. and Susanne S. Tyler Pathway Fund

Dr. James Valentine Fund

Vallentin Fund

Vanderbilt Charitable Fund*

The Jackie and Mark Wendland Fund

Maija, Eva and Cody West Family Fund*

Ben and Mary Ann Whitten Fund

Wiegand Family Foundation

Willemssen Family Fund

Bill and Kathi Wojtkowski Fund

Wold Family Foundation

Martin R. Wolf Family Fund

Marsha McMahan Zelus Fund

Zeve Fund

Field of Interest Funds

Donors specify a charitable area of interest and the CFMC awards grants to local nonprofit organizations.

Ruth L. and Wilbur K. Amonette Fund

The Todd Lueders Fund for the Arts

Paul Block, Jr. Fund

Patricia J. Boles Fund

Maureen Bradford Fund

Stephen and Madeleine Conran Fund

The John & Mary Dawson Learning Fund

Thomas Doud, Sr. and Anita M. Doud Fund I

Ken and Gundy DuVall Fund

Fund for the Environment

Fred Farr Environmental Stewardship Fund

Cyrus F. Fitton Fund

Jean P. Fitton Fund

Rudy E. Futer Fund for Human & Humane Needs

Good Neighbor Basic Human Needs Fund

Gumm Fund for the Performing Arts

Elmer Mills Harris Fund

Douglas Madsen Fund for HIV/AIDS Housing in Monterey County

The Fund for Homeless Women

The Fund for Homeless Women Non-Endowed Fund

Terry Layne Fund for Beach Protection

Kathleen and Howard Marks Fund

The McKay Fund

MPUSD Fund for the Arts

Leslie Mulford Fund*

Engracia Irene Murray Field of Interest Fund

Margaret L. Musser Field of Interest Fund

Andrew D. and Marjorie S. Orrick Fund

Out Reach - A Fund for LGBT Life in Monterey County

Jay and Kip Hudson; College Futures Scholarship recipient and donor reception



June P. Sheppard Fund for the Performing Arts
Siembra Latinos Fund
Frank Pye Smith M.D. Medical Facilities Fund
Robert and Virginia Stanton Endowment Fund
Irving R. and Helen G. Stuart Fund
The James M. and Marjorie E. Sturgeon Fund
Shirley I. Thackara Fund
Evelyn and Spencer Thompson Fund to Help Feed the Hungry
Dr. George & Sam Kih Thorngate Family Fund
Tri-Counties Blood Bank Fund
Anita Tarr Turk Fund for Breast Cancer Research
Women's Fund Endowment Youth Fund

General Endowment Funds

These funds provide philanthropic resources for CFMC community grantmaking.

Fund for the 21st Century
Kathleen and Austin Barrows Fund
Wendy (Millard) Benjamin Fund
Cislini Fund #2
Mary Jane Drummond Fund
Lewis and Gloria Fenton Fund
Marilyn & Philo Holland Fund
Lauralie and J. Irvine Fund
George P. and Betty Kendall Memorial Fund
Leo Lanini Fund
The Barbara and Joseph Lee Fund
The John and Nancy Love Fund
John R. Marron Fund
General Endowment Fund of the Community Foundation
General Endowment-NGP Grants
General Endowment - Opportunity Fund
Paul Edward and Gay Delores Rochester Fund
The Donna Roop Endowment Fund
The Scott Fund
Renita K. Seibel Fund**
Clyn & Pamela Smith Fund
Evelyn Torras Fund
CFMC Trustees Fund

Private Foundation Funds

These funds offer a customized blend of administrative support plus tax advantages, increased

flexibility and personalized philanthropic services.
College Futures Foundation Fund
The Joel and Dena Gambord Charitable Foundation
The Morse Foundation Scholarship Fund
The Morse Foundation Stewardship Fund
The David and Lucile Packard Foundation Fund
S.T.A.R. Foundation of Monterey County Stewardship Fund
Robert and Florence Slinger Fund
The Alexander F. Victor Foundation

Scholarship & Award Funds

Donors invest in the future of local students.

Monica Abbott Scholarship Fund
AIA Monterey Bay Concepts Competition Fund

American Culinary Federation Monterey Bay Chapter, Marc H. Vedrines Scholarship Fund*

Dr. William D. Barr Scholarship Fund for Excellence in Educational Leadership
Dr. Roger and Kate Bartels Memorial Scholarship Fund
The Bissell Fund
James Bliss & Annette Sward Forestry & Nursing Scholarship Fund
Margaret and Seba Bronson Scholarship Fund
Carol C. W. Butterfield Bacon Scholarship Fund
The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship Fund
California Polytechnic State University Agriculture Business Department Endowment Fund
Carmel High School Class of 1952 Fund

Carmel Valley Women's Club Foundation Scholarship Fund*

CHISPA Scholarship Fund
Bill Clapper Memorial Music Scholarship Fund
College Futures Monterey County Fund
Raymond H. Costa Family Scholarship Fund
Drezner Family Scholarship Fund

The Elkhorn Slough Foundation's James Rote & Les Strnad Scholarship Fund
David L. Ferguson Scholarship Fund
Matthew Paul Finnigan Memorial Scholarship Fund
Joel and Dena Gambord Nursing Scholarship
Girls' Health in Girls' Hands Scholarship Fund
The Allen S. Griffin Fund
Geraldyn R. Griffith Memorial Scholarship Fund

Whitney Elisabeth Grummon Memorial Scholarship Fund* R. J. Harper Memorial Scholarship Fund*

Jess Harrison Family Scholarship Fund
Hausdorf Family Scholarship Fund
Scholarship Fund for Homeless Women*
Bonnie Hutcheon Scholarship Fund
Ipson-Tully Cal Memorial Scholarship Fund
Elke Junger Sharing for the Future Scholarship Fund
Kier Memorial Scholarship Fund
George V. Kriste Scholarship Fund
Howard and Gretchen Leach Scholarship Fund
Rotary Club of Monterey Martin/Hurd Scholarship Fund
Men's Golf Association (MGA) at Quail Lodge Scholarship Fund*

John S. Myszak Scholarship for Future Teachers**
Robert Hattori Nakamura Memorial Scholarship Fund
Anthony Nicholas Narigi Memorial Baseball Scholarship Fund
Libby Oliver Scholarship Fund
Dr. Gladys M. Olvis Scholarship Fund
Kristopher Pallastrini Fund
Richard Scott Reynolds Science and Technology Education Scholarship Fund
San Ardo Foundation for Education
Theodore R. Sarbin Research and Scholarship Award Fund
The Harles R. Sarment College Endowment

Steven Paul Schmidt Scholarship Fund*

Alan and Rita Shugart Scholarship Fund
Joseph and Betty Spradling Scholarship Fund
Robert Stanton Award Fund
Wilbur H. and Maxine D. Stevens Scholarship Fund
The Nan Borreson and Fred Terman Scholarship Fund*
Hugo and Dolores Tottino Family Scholarship Fund
Jack Van Zander Cal Alumni Memorial Scholarship Fund
Charles Joseph Watts Scholarship Fund
Shelley Watts Scholarship Fund
Horace H. Wilson Scholarship Fund

Special Purpose Funds

These funds are established for specific projects or initiatives with a limited time frame.

Alert Monterey County Fund
Big Sur Relief Fund
Community Leadership Project Center for Nonprofit Excellence
Girls Health Initiative

The James Irvine Foundation Salinas Leadership Fund*

King City Recreation Commission
Forden Park Playground Fund
Monterey County Development Professionals Fund

Monterey County Gives!*

Pathways to Safety

The number of donors has grown and there are now too many to list in print! Please find the list at www.cfmco.org/Donors. We thank you for your partnership.

*New Fund Created in 2018

** New fund created in 2019

✓ I to r: Ted and Velma Balestreri congratulate Leon and Sylvia Panetta at the Celebration of Philanthropy; Carmel Woman's Club members support the Women's Fund Luncheon





CELEBRATING PHILANTHROPY

2018 DISTINGUISHED TRUSTEE AWARD SECRETARY LEON & SYLVIA PANETTA

Celebrating philanthropy is an important part of the Community Foundation's mission, "To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County." One of the best ways to do that is to shine a light on people who are making a difference in our region. The CFMC's Celebration of Philanthropy does just that, thanking those who support and partner with the CFMC to invest in healthy, safe, vibrant communities.

The Distinguished Trustee Award, presented annually, honors those who have demonstrated philanthropic leadership in Monterey County. Secretary Leon Panetta and Sylvia Panetta, the 2018 recipients, exemplify the qualities the award celebrates. Though they have been active on the national and international stage, the Panettas never lost their sense of place and commitment to Monterey County.

"They are champions of civic engagement, and outstanding supporters of nonprofits advancing literacy, healthcare, public education and youth development," noted Ken Petersen, CFMC 2018 Board Chair. "Their decades of leadership have inspired and encouraged others and their commitment to excellence has served as a model for other organizations."

In 1997, the Panettas co-founded The Panetta Institute for Public Policy, a nonpartisan,

nonprofit study center to inspire men and women to lives of public service. The Institute is committed to growing leadership and creating opportunities for education and debate. Through the Panetta Institute, Sylvia Panetta was key in launching the Monterey County Reads Consortium. Long-time friend Mary Orradre noted, "Sylvia and Leon give new meaning to the phrase, 'Giving Back.'"

Secretary Panetta has had a 50-year career in public service at the highest levels of government including serving as congressman representing the California Central Coast for 16 years, White House Chief of Staff, Director of the CIA and the 23rd Secretary of Defense. One of his proudest accomplishments is the establishment of the Monterey Bay National Marine Sanctuary.

Sylvia Panetta directed five Congressional district offices during Leon's service in the U.S. House of Representatives and managed his re-election campaigns. She has served as Chair of the Board of Directors and CEO of the Panetta Institute and as a board member for several nonprofit organizations, including the CFMC.

As award recipients, the Panettas designated a \$10,000 grant from the CFMC to the Panetta Institute for Public Policy. To read more and see the full list of Distinguished Trustee Award Recipients, visit www.cfmco.org/Panettas.

“

We were deeply honored to receive the Distinguished Trustee Award because the work of the Community Foundation and the Panetta Institute is dedicated to the same goal – making the American Dream real for all people.

— LEON AND SYLVIA PANETTA

”



“

By including our children and getting their families involved now, we're confident we are passing on a legacy of giving. It gives us great joy and satisfaction to know they will carry it forward to future generations.”

— JOHN AND ANN MAHONEY
(right, with Dan Baldwin)



CREATING A LEGACY LEGACY SOCIETY

www.cfmco.org/Legacy

A planned gift is one of the most meaningful and personal ways to give. With thoughtful estate planning now, you can rest assured your philanthropy will communicate your values and make a difference into the future. We are thankful to those who have made this important decision.

Anonymous (8)
Mrs. Wilber K. Amonette*
Tonya and Rick* Antle
Yvonne A. Ascher and
Leonard Laub
Tony Ayres
Daniel R. Baldwin and Anne
Ylvisaker
Robert P. Balles
Nancy L. Bartell
Lisa Bennett and
Robin White
John B. Bergin*
Paul P. Bianchi
Nancy Bletzer
Joyce Blevins and
Katherine M. Coopman
James W. Bogart
Thomas Bohnen
Jay and Ann Brown
Julie A. Cason and
Lisa K. Crawley
Joseph* and Betty Chaffers
Mishka Chudilowsky and
Henry Azama
Mary J. Clapper
Arthur Connell*
Julie Conrad
Leland* and Gloria Dake
Robert N. Danziger and
Martha Drexler Lynn
Margaret D'Arrigo-Martin
Larry Davidson and
Beverly Dekker-Davidson
Wallace F. and Lucille Davis*
Christine Dawson
Steve and Sonja Dennis
Martin Dodd*
Meg Donat
William and Nancy Doolittle
Julie Drezner
Stephen Eimer and
Kevin Ann Cartwright
Frances H. Elgan*
Bertie Bialek Elliott
Norma Esselstyn
Lowel I. Figen*
Cyrus and Jean Fitton*
Anne R. Fitzpatrick

Crawford E. and Linda P. Foy
Susie and Charly Franklin
Joan M. Franz
Joel S. and Dena Gambord
James and Jeri Gattis
Donald* and Frances Gaver
Lupe Gomez*
Rodney Guilfoil*
Terry Haber*
Ruth Hartmann
Peter C. Hatton
Virginia O. Hawes
Holly and Jeff Haynes
Dick Hawkinson*
Thomas Hawley
Peter and
Jacqueline Henning
Joseph and Elizabeth Heston
Carol and Don Hilburn
Richard Hogley and
Deborah Steel
Jeffrey and Amanda Holder
Jeanne S. Holmquist
Tom Hopkins
Robert and Millie House
Chris and Toulia Hubbard
Kip and Jay Hudson
Vince Huth
Jack Jewett
Craig and Christine Johnson
Joanne Taylor Johnson
Mark and Susan Johnson
Colburn and Alana Jones
Joanne K. Juarez
Deborah Juran
Karen D. Kadushin
Mary Ann Kane
Rick and Martha Kennifer
Capt. Steven D. Kesserling
and Jean M. Forrest
Alice V. Kinsler
Paul Lawrence* and
Marian Buccafurni
Douglas C. Lee
Laurel Lee-Alexander
Jennifer Levey
David S. and Norma Lewis
Esther H. Lindsey
Robert H. Lindsey

Janette Loomis
Todd Lueders
Valera W. Lyles
Tom and Kathy Macdonald
John and Ann Mahoney
Jan and Tannie* Mandel
Roger and Carolann Manley
Michael and Tobi Marcus
Joseph A. and Sheila Mark
Dr. William McAfee
Jan McAlister
Sherrie McCullough
Terry A. McHenry and
Joan Smith McHenry
Thomas D. Melville
Lenore Meyer*
Malcolm* and
Joanne Millard
Patricia Monahan
Sidney Morris
Leslie Mulford
Lary and Tony Muller
Alec and Kim Murdock
David M. Nee
Vicki Nelson
Diane R. Nonella
F. Robert Nunes
Alfred P. Oliverio
Charles Olvis and
Miranda Morris
Mike and Mary Orradre
Nicholas M. and
Nicollette Pasculli
Ken Petersen
John Phillips and
June Dunbar Phillips
Gregory A. and
Winoma Plaskett
Rex* and Joan Reade
Donna Hart Reid
Michael Reid and
Bill Robnett
Paul Rochester*
Lee and Shirley Rosen
Jean Rudolph*,
The Lauralie Irvine
Foundation
James C. Sanders
John C. Sanders*

Kenneth C. Schley
Steven Paul Schmidt
Maria Salazar Segovia
Carol Shade*
JeriAnn Shapiro*
Connie Shelstad
Robert B. Sheppard*
Janet L. Shing
Sidney Sue Slade
Madison Smith*
Pamela D. Smith*
Charles and Leslie Snorf
George Somero and
Amy Anderson
David and
Maryanne Spradling
Jean Stallings
Loren Steck and
Annette Yee Steck
Judy Sulsona and
Bill Rawson
Tom Sweeney
Robert and Leslie Taylor
Fredrick W. Terman and
Nan Borreson
Shirley Thackara*
Michael and
Cindy Lee Thatcher
Brian Thayer
Peter and Anne* Thorp
Vincent* and Evelyn* Torras
William H. Tyler, III and
Susanne S. Tyler
Patricia Tynan-Chapman
William Umeki*
James R. Valentine
Robin Venuti and
Joseph Rock
Arlene Wall
Jacqueline Wendland
Benjamin and
Mary Ann Whitten
Nels and Jill Wiegand
Martin R. Wolf
Kenneth and Mary Wright
Richard Zahm*

WAYS TO BECOME A LEGACY SOCIETY MEMBER

- Bequest (through your will or trust)
- Charitable Remainder Trust (CRT)
- Charitable Gift Annuity (CGA)
- Designate the CFMC as beneficiary of a retirement plan or IRA account
- Gift of life insurance
- Create an endowed fund (or contribute \$25,000 or more to an endowed fund)

If you have included the CFMC in your estate plan, please contact us so we may recognize your generosity. Legacy Society members may also choose to remain anonymous. We would be honored to assist you in your legacy planning. Please contact Christine Dawson or Dan Baldwin at 831.375.9712 to learn more.

FINANCIALS

COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2018

Additions

Contributions*	17,290,908
Other income	486,068

Total revenues and support 17,776,976

Investment loss	(12,105,328)
-----------------	--------------

Grants and expenses

Grants*	17,457,045
Other operating expenses	3,663,592

Total grants and expenses 21,120,637

Decrease in net assets	(15,448,989)
------------------------	--------------

Net assets

Beginning of year	213,820,247
-------------------	-------------

End of Year \$198,371,258

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

CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2018

Assets

Cash and equivalents	13,311,928
Contributions receivable	2,356,063
Other assets	29,040
Property and equipment, net	23,144,247
Investments, carried at market value:	
Mutual funds and equities	162,751,406
Cash and money market funds	13,982,668
Charitable gift annuities	3,449,120
Beneficial interest in remainder trusts administered by other trustees	2,770,159
Investments held in charitable remainder trusts	25,907,734

Total assets 247,702,365

Liabilities and net assets

Grants payable	1,608,322
Accounts payable and accrued expenses	136,768
Liabilities under split-interest agreements and charitable remainder trusts	20,117,540
Funds held for others	27,468,477

Total liabilities 49,331,107

Total net assets \$198,371,258

QUICK FACTS

Gifts

\$22.5 million

Grants

\$18.7 million

38

New Funds Opened

\$247 million
in assets

Top 100

Community Foundations in the
U.S. (asset size)
Columbus Survey 2017



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

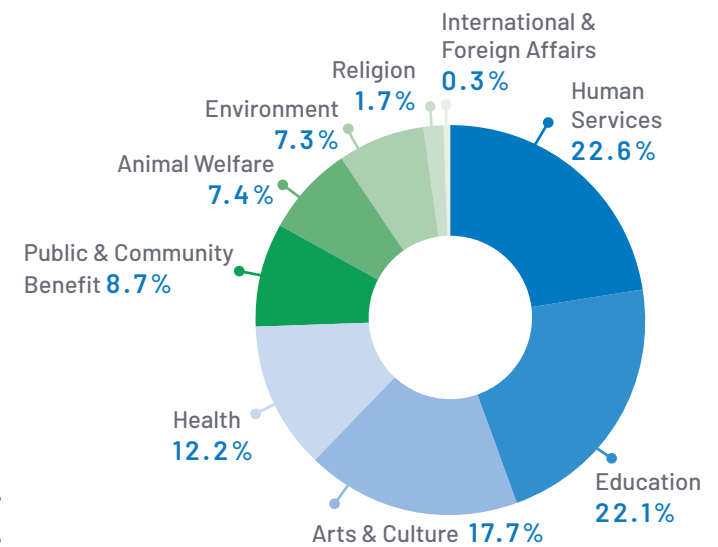
The condensed financial information was
prepared based upon audited financial
statements prepared by Hutchinson and
Bloodgood, LLP.

GRANTS

The \$18.7 million granted in 2018 is distributed in a wide variety of program areas throughout Monterey County and beyond. Following is a breakdown of grants by area, geography and type.

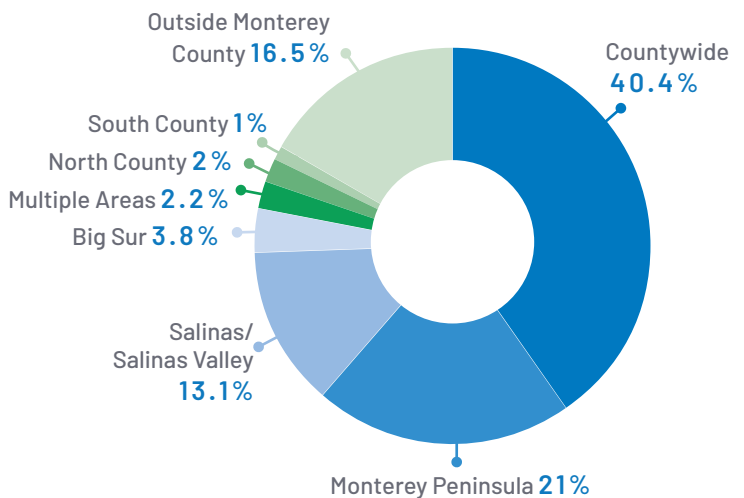
Grants by Program Area

Human Services	4,245,570
Education	4,149,499
Arts & Culture	3,310,469
Health (Individual & Community)	2,281,449
Public & Community Benefit	1,623,461
Animal Welfare	1,381,112
Environment	1,374,524
Religion-related	320,990
International & Foreign Affairs	60,040

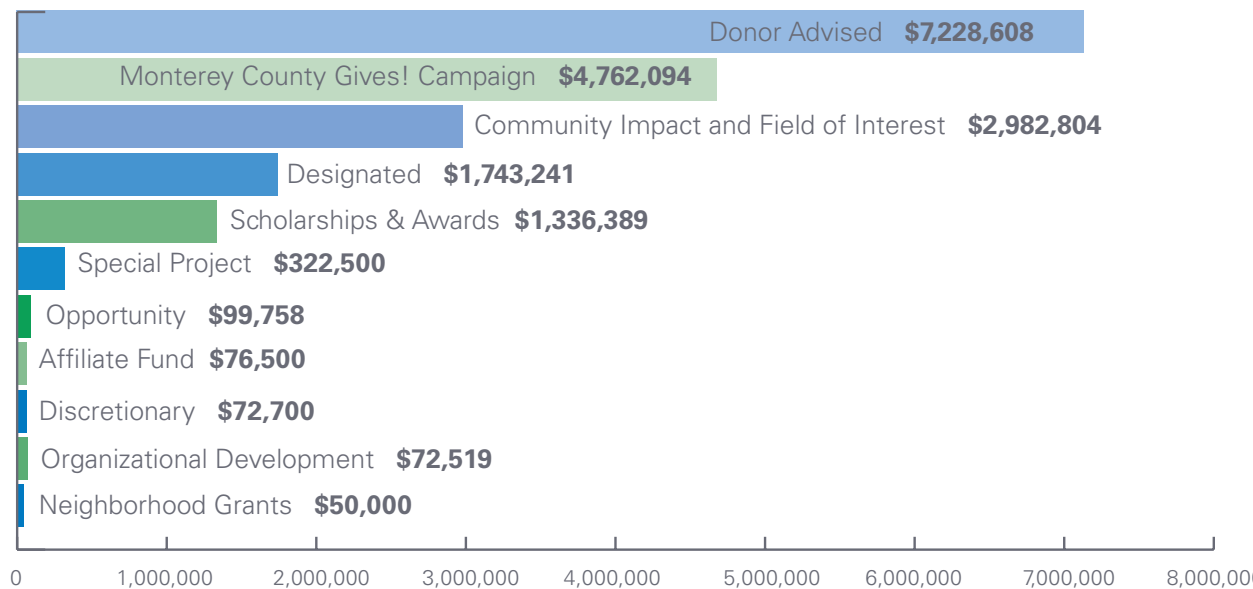


Grants by Region

Countywide	7,581,359
Monterey Peninsula	3,929,687
Salinas/Salinas Valley	2,451,538
Big Sur	709,486
Multiple Areas	415,524
North County	376,579
South County	184,855
Outside Monterey County	3,098,086



Grants by Type



LEADERSHIP



Standing (l to r) Nolan Kennedy, Jan Vanderbilt, Elsa Mendoza Jimenez, Ken Petersen, Abby Taylor-Silva, Bill Mitchell, Maija West, Michael Reid, Fred Meurer, Giff Lehman, Jeff Eikenberry, Loren Steck, Erica Padilla-Chavez, Bill Sharpe.

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(l to r) Rick Antle, Donald Gaver, Carol Shade, Whitney Grummon, Rex Reade, Mary Morse Shaw, Weston Call

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1. CREATE

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2. CHOOSE

You choose the assets to make a gift to create the fund. Cash, publicly traded securities, closely held stocks, real estate or tangible personal properties are often used. You can also direct a gift from your will or trust to create or add to a fund.

3. GIVE

Recommend grants from the fund. We can help you make a difference on issues and causes that matter to you most in Monterey County or anywhere in the world.

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