VISION
HEALTHY, SAFE, VIBRANT COMMUNITIES

MISSION
TO INSPIRE PHILANTHROPY AND BE A CATALYST FOR STRENGTHENING COMMUNITIES THROUGHOUT MONTEREY COUNTY

OPPORTUNITY & IMPACT

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2017 Quick Facts

$47.58 Million in Gifts Received
59 New Funds Created

Top 100 Community Foundations in the U.S. (in asset size)*
*Columbus Survey 2017

$167 Million in Cumulative Grantmaking Since 1981

$267 Million Assets Grew 14.8% to a Record $267 Million

$16.7 Million Grants, Awards and Scholarships Approved for Distribution to 641 Grantees

Cover Photos: (l to r) Ventana Wilderness Alliance Frieda Rios, GHGH Scholarship Recipient Interior Photo: Chris Burnham
MESSAGE TO THE COMMUNITY

From the Chair & President/CEO

Opportunity and Impact: words that are important to the Community Foundation for Monterey County (CFMC). Whether through grantmaking or the development of new initiatives, we seek opportunities that will make deep impact on our communities. This also takes form in our resource development efforts, as donor advisors or those working on their estate plans seek a strong philanthropic partner who can assist them in finding opportunities for impact. We hope you’ll enjoy the inspiring stories described in this report, and agree with us that your community foundation is working hard to make Monterey County stronger.

Growth opportunities can mean many things to a community foundation. New funds, gifts and growing assets, all of which occurred at a record pace in 2017. We recorded nearly $50 million in gifts, started 59 funds and had year-end assets totaling $267 million. Our primary portfolio returned 15.4% in 2017, raising fund balances and creating additional opportunities for impact.

The asset numbers are inspiring but the real story lies in the process that generated a record $16.7 million in grants. This stems from the growing symbiosis between the CFMC and its donor advisors, the best practices applied through our Community Impact grant program, and the fast-growing level of scholarships we awarded. It feels so long ago, but it was only October 2017 that the Pfeiffer Canyon Bridge reopened, reconnecting Big Sur to tourism and residents. Through a wonderful group of generous donors, the CFMC was able to open and promote the Big Sur Relief Fund, which provided critical support to hospitality workers whose livelihoods were in jeopardy. Separate from grantmaking, we remained very involved in seeking solutions for homelessness, and embarked on a similar path with affordable housing.

A quieter development may prove to be one of our most important in years ahead. The formation of the Siembra Latinos Fund seeks to welcome a more diverse set of participants into philanthropy. Siembra Latinos is utilizing the same structure as our two affiliates – the Northern and Southern Monterey County Foundations – in which an advisory board of knowledgeable leaders oversees the fund’s growth and grantmaking. The more people who can engage in philanthropy, the greater the sustainability and impact.

None of this is possible without a dedicated board and staff, here to serve a community committed to philanthropy. It’s a big, healthy partnership, and one that will be Here for Good.

“"The more people who can engage in philanthropy, the greater the sustainability and impact.”
– Dan Baldwin, CFMC President/CEO

Steve McGowan, 2017 Chair (l) and Dan Baldwin, CFMC President/CEO (r)
Impact begins with individuals, families and businesses who partner with the Community Foundation for Monterey County to fulfill their philanthropic vision. Their generosity fuels grants that change lives and communities for the better, making an indelible impact. Sharing these stories causes a ripple effect, attracting more philanthropic resources, creating even more opportunity for good.

This dynamic fulfills our mission, “To inspire philanthropy, and be a catalyst for strengthening communities throughout Monterey County.” Thank you to our donors, fellow nonprofit organizations, the professional advisor community, and all our philanthropic partners. You make a future with healthy, safe, vibrant communities possible.
STRENGTHENING COMMUNITIES
$16.7 Million Granted

Grantmaking is the hallmark of the Community Foundation. In 2017 the CFMC granted more than $16.7 million through 1,508 grants to 641 organizations.

The CFMC is increasing accessibility and opportunity for nonprofits in its grantmaking programs by streamlining procedures and simplifying the process. We created programs that broaden nonprofits’ ability to apply and the CFMC’s ability to support a wider group of organizations. These programs include: Community Impact small grants (up to $12,000), Opportunity Grants (up to $10,000), Organizational Development grants (up to $5,000) and CFMC Donor Advisor Giving Together opportunities.

Grantmaking Impact
- Dozens of youth saw the ocean for the first time thanks to Monterey Bay Aquarium and Ventana Wildlife Society.
- 85 youth received one-on-one mentorship and hands-on arts instruction. The Reaching Across Generations project paired young artists with elder artists at Youth Arts Collective (YAC), an after-school art studio and mentorship program in Monterey.
- The Monterey County Rape Crisis Center provided child abuse prevention education to more than 10,000 elementary school students resulting in safer conditions for many children.
- More than 1,000 people, cut off by the Pfeiffer Canyon Bridge to the north and mudslide to the south, received support through the Big Sur Relief Fund.
- 1,345 children received free dental screenings from Salud Para La Gente. 57 received basic preventive and restorative dental care and treatment and 648 were referred for further treatment, leading to better dental health.
- 59 seniors provided tutoring support to 167 pre-school and elementary-aged children in Monterey County. Thanks to the Foster Grandparent program of the Seniors Council of Santa Cruz and San Benito Counties, nearly all students improved their language, literacy, logic and math skills.
- Gathering for Women served weekly meals to 310 homeless women and provided referrals and resources, healthcare, behavioral health, clothing/hygiene products and enrichment activities in Monterey.
- Dorothy’s Place enrolled 128 homeless people in Monterey County’s coordinated assessment for shelter, many of whom received ongoing case management to help transition to housing and other supportive services.
- 128 people with a dual diagnosis of mental illness and alcohol/drug addiction benefited from the remodeled Bridge House residential and day rehabilitation programs through Interim, Inc.

Partnering with Funders
The CFMC appreciates the continuing collaboration with funding partners. Grants from the College Futures Foundation, Claire Gianinni Fund, Monterey Peninsula Foundation, Nancy Buck Ransom Foundation, and the David and Lucile Packard Foundation enhanced CFMC programs and initiatives.

See page 28 for more grant details or visit www.cfmco.org/RecentGrants.
Girls Inc. of the Central Coast

Girls Inc. of the Central Coast wants to inspire girls to be strong, smart and bold, to respect themselves and the world around them. This message is spread through programs that serve elementary, middle and high school students, challenging them to develop their leadership skills while giving them exposure to life outside their communities. The program takes place in 28 sites throughout Monterey County and reaches more than 1,000 girls each year.

The organization received a $30,000 grant to support girls in Greenfield, King City and Soledad through the ECHO, Girls in Will Power/Won’t Power and Friendly PEERSuasion Programs. The goals are to counter economic insecurity, high school dropout rates, teen pregnancy, substance abuse and gang participation. More than 300 girls have a chance to focus on leadership development, goal setting, decision-making, advocacy, avoiding risky behaviors, and pursuing a college education.

“More than once our instructors have stood on the beach with a teenager who had never walked in the sand - despite being born and raised in Monterey County, or spoken with a previous camper who was still excited, years later, about the one time they spent the night in Big Sur with our summer camp.”

- Alena Porte, Ventana Wildlife Society’s Education and Outreach Manager

Ventana Wildlife Society

From whale watching, monitoring California condors and exploring tide pools in Big Sur, to scrambling in caves in Pinnacles National Park, hundreds of Monterey County youth have experienced local wildlife and open spaces.

“Connecting youth to nature helps to create an emotional bond. For many adults, a lifelong love of nature started because they were afforded the opportunity to experience it,” said Alena Porte, Ventana Wildlife Society’s Education and Outreach Manager.

The organization received $25,000 to support its environmental education programs that not only expose children to nature, but include critical thinking, problem-solving, art and journaling to capture their experiences.

Ventana Wildlife Society partners with organizations such as Salinas PAL, Marina Youth Center, Monterey County Office of Education, Rancho Cielo and Cesar Chavez Library to reach youth that might not have access to outdoor education and natural science. This year the organization expects to reach 1,600 youth, with more than half from underserved communities attending at no cost.
HEALTH & HUMAN SERVICES
YWCA Monterey County

Leaving an abusive home can be the most difficult and bravest decision a person in crisis will ever make. Since 1982 the YWCA Monterey County has operated Monterey County’s longest-running confidentially located emergency shelter, providing a safe place for families to heal. A $25,000 grant supported a housing case manager for the YWCA’s Safe House program, to assist victims of domestic violence find permanent shelter and much needed resources.

Each year, the program serves an average of 20 families, 87% of whom are low income. Safe House clients undergo an eight-week program that offers them three meals a day, case management, life skills workshops, transportation, counseling, legal advocacy and support navigating the social services network and judicial system. Once the program is completed, clients often need support in transitioning back into a normal and independent life, free from violence. That’s the role of the transitional case manager, who is tasked with helping clients find housing, employment, childcare and other necessities to begin rebuilding their lives.

COMMUNITY DEVELOPMENT
Loaves, Fishes & Computers

While technology brings the world closer, there is a divide between those that have computers and those that don’t. Salinas-based Loaves, Fishes & Computers (LFC) is bridging that divide by getting computers into the homes of low-income families and individuals. It provides refurbished, ready-to-use computers to help people look for jobs, advance their careers, go to school and use technology to improve their lives.

A $22,000 grant provided funding to train 200 volunteers to refurbish and reuse computers, and gave free and low-cost access to technology and training to senior citizens, students, and disabled people throughout Monterey County. “Since 2009, we provided over 3,150 computers to individuals and families, assisting thousands of people to acquire the technology and skills that are critical in today’s economy,” said Christian Mendelsohn, Executive Director.

ART, CULTURE & HISTORIC PRESERVATION
Art in Action

Art in Action engages teachers and students in creating art. The nonprofit works to provide teachers with curriculum and innovative ways to teach art, and provides students with inspiring connections to art.

“A lack of funding, training, or commitment should not be a roadblock to turning our belief in educational equity through art into reality for ALL kids,” said Mara Grimes, Art in Action’s Development Manager. A $12,000 grant supported after-school and summer art lessons at 10 Monterey Peninsula Unified School District schools, benefiting 680 students and 18 teachers.

“I walked out that same day with a computer. I had never owned a computer before in my life! From that day on, I no longer had that obstacle and continued with my education.”

– Marlene Ramirez, former student, now social worker, received a computer from LFC
SCHOLARSHIPS:
INVESTING
In Potential through Education

$750,000
Awarded

“Growing up I believed that going to a university would be out of my reach because of my family income, so I only dreamed about it. With this scholarship, my dream became a reality.”
– Alejandro Estrada-Esparza

“You made my pathway to success clearer, and when I walk across that stage in the fall, I’ll remember you. I’m immensely grateful.”
– Adriana Jazmin Vargas Medoza

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Scholarships
Awarded
A college education represents the gateway to opportunity. With the continued support of our donors, 2017 was another record year for scholarships. We awarded over $750,000 to 225 students through 48 scholarship programs, this is double the dollar amount and a 79% increase in the number of students from 2016. The CFMC manages $7.8 million dedicated to awarding scholarships to Monterey County students. These dollars represent a recognition by our community that access to affordable, high quality education for everyone is critical to ensuring a bright future.

**Scholarship Growth**

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<td>2017</td>
<td>225</td>
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</tbody>
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**Scholarships & Support**

These students will continue to receive support through our partnership with CSUMB’s college outreach programs and will be eligible to renew their scholarships for the 2018-19 school year. Students in similar programs throughout California graduate at much higher rates than their peers who do not receive advising and scholarship support.

There are three ways to invest in College Futures Monterey County:

- You can establish a named scholarship fund within the program and receive updates on the students who receive scholarships from your fund.
- You can make an annual or one-time gift to support scholarships through the program.
- You can work with us to leave a gift in your will or estate.

All these gifts help deserving students realize their full potential.

**www.cfmco.org/CollegeFutures**

**SCHOLARSHIP FUNDS: A CUSTOMIZED APPROACH**

Here are three examples of how the CFMC partners with donors to customize their approach.

In its first year, The Rotary Club of Monterey Martin/Hurd Scholarship awarded $30,000 to six students from Monterey, Seaside, and Marina high schools. Our staff worked with the club’s committee to collect and review applications, select recipients, and invite students to a recognition event.

Joel and Dena Gambord established the Joel and Dena Gambord Nursing Scholarship to support Bachelor of Science in Nursing students at CSU Monterey Bay. The Gambords recognized the need for more well-trained, culturally competent local nurses. Thanks to their commitment, in 2017 the fund awarded $85,000 to 11 nursing students.

Rob and Julie Drezner, with support from several family members, established the Drezner Family Scholarship. It benefits students at Hartnell College and Monterey Peninsula College who are transferring to a four-year college or university and are committed to service to others. We worked with the Drezners to review applications, schedule and conduct student interviews, and award scholarships to three students.

**www.cfmco.org/Scholarships**

**COLLEGE FUTURES MONTEREY COUNTY**

2017 was the first full year of College Futures Monterey County, a new effort to increase the rate of college completion. Over 600 students from seven high schools in Castroville, Salinas, Salinas Valley and Seaside attended a series of workshops covering topics like college applications, financial literacy, financial aid applications, choosing a college, and academic success strategies.

209 students completed all three workshops required to apply for a scholarship. With support from College Futures Foundation and several generous donors, we awarded $260,000 to 65 low-income, underrepresented students. Ninety-two percent of the recipients are the first in their family to attend college, and 71% attend a four-year university.

**www.cfmco.org/CollegeFutures**
NEIGHBORS HELPING NEIGHBORS
Affiliate Funds

When concerned and engaged residents look to make their communities a better place, an opportunity is created. When these people come together to raise funds for both immediate grantmaking and to build an endowment for future good, you have impact.

This is what happens when an affiliate fund is formed. Local community members come together to form an advisory board for a foundation to serve a specific geographic region in Monterey County. The CFMC handles all administrative details, while the advisory board raises funds and recommends grants in their region.

Northern Monterey County Foundation
2017 saw the first grants made by the Northern Monterey County Foundation (NMCF), which serves the communities of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita. Ten nonprofits received support to continue and expand their important work in North County.

Started in 2016, the NMCF has already surpassed $300,000 in gifts and pledges from nearly two dozen individuals, families and businesses. This success is a testament to the willingness of North County residents to come together to make their communities safer, stronger and more vibrant. To learn more or contribute, visit www.cfmco.org/NMCF.

Southern Monterey County Foundation
The future of philanthropy is something people in South County care about. That’s why the Southern Monterey County Foundation (SMCF), the affiliate fund that serves King City and points south, was formed in 2013. In four years of grantmaking, the SMCF has granted over $72,000 to 23 organizations, providing much needed programs in South County communities. At the same time, an endowment is being built—nearly $120,000 to date—that will provide funding for future generations.

The SMCF has been supported by nearly 40 South County residents and businesses, most of whom have joined the SMCF Founding Family by pledging $5,000 over the first five years. All donations are split between immediate grantmaking and endowment building. This model allows the SMCF to make a difference now, while investing in the future. To learn more or give, visit www.cfmco.org/SMCF.

“We now have a way to build an endowment to benefit future needs, while making immediate grants to organizations providing services for current issues in our area.”

– Don Chapin NMCF Advisory Board Chair
One of the best ways to create impact is to harness the power of community. The Siembra Latinos Fund (SLF) was created in 2017 by a group of Latino leaders to grow the power of philanthropy for Monterey County Latinos.

Siembra means “to sow” and the goal of the SLF is to grow opportunities for Latino residents by inspiring philanthropy and cultivating healthy, safe and engaged Latino communities.

More than $50,000 was contributed in the fund's first year. The advisory board developed grant guidelines, and $20,000 will be granted in 2018 in the areas of Arts and Culture, Community Development, Education, Health, Human Services and Safety.

Grants will support programs that help Latino children and youth reach their full potential, improve the physical and mental health of individuals and families, enhance environments, build community and economic security, broaden and deepen participation in artistic experiences and help with basic needs for vulnerable individuals. To contribute, or for more information, please visit www.cfmco.org/SLF.

The Siembra Latinos Fund is one of ten members of the National Latino Funds Alliance.

“We are proud to be on the forefront of Latino philanthropy and help sow the seeds for a strong and vibrant Latino community.”
- Blanca E. Zarazua, Esq., Siembra Latinos Fund Advisory Board Chair
“Just when we were wondering, 'How are we going to make it?', we received a check and knew we were not alone. Your generous help is very appreciated as is knowing friends and neighbors really care.” - Big Sur resident

Disaster followed disaster as the Soberanes Fire in Big Sur, was followed by rain, flooding, road closures and landslides. Winter rains led to the collapse and demolition of Pfeiffer Canyon Bridge, which connects parts of the Big Sur community to points north. The damage caused tremendous hardship for Big Sur residents, employees and their families, who were unable to access work and school. The philanthropic response provided an opportunity for people to help others through difficult times.

The Big Sur Relief Fund was created at the urging of David Fink, Founder/CEO of Mirabel Hotel & Restaurant Group, together with owners of Nepenthe, Ventana Big Sur, Post Ranch Inn and other hospitality businesses. Thanks to the outpouring of local and national support, a CFMC grant committee, led by Big Sur residents and leaders, provided $352,199 in aid. Support was directed by grantee Coast Property Owners Association (CPOA) to qualified individuals through an extensive vetting process.

One hundred percent of donations provided relief and assistance to the affected residents and individuals working in Big Sur. Patte Kronlund, CPOA Advisory Board member said, “We heard hundreds of personal ‘Thank You’s’ when walking the Community Bypass Trail from individuals who have received support!”

The Big Sur Relief Fund grants, when combined with grants from the Soberanes Fire Fund, exceeded $1.3 million.

www.cfmco.org/BigSurReliefFund

“The partnership has been seamless. Our intimate knowledge of community and CFMC’s fundraising capability allowed meaningful immediate relief.”

- Patte and Butch Kronlund, CPOA Advisory Board members
“Your support helps girls gain leadership skills, reach for their goals, and ultimately thrive.”
- Christine Dawson, Vice President of Philanthropic Services

The Women’s Fund of the Community Foundation for Monterey County is making life-changing impact by creating economic and educational opportunities for women and girls in Monterey County.

Founded in 2003, the fund has granted $1.7 million to programs and projects ranging from the Women’s Economic Security Initiative, a three-year initiative to give women skills and support to move out of poverty, to funding college scholarships for local women and girls.

Helping Students Fulfill Their Dreams

Girls’ Health in Girls’ Hands (GHGH) is a girl-led, countywide collaborative program, created by the Women’s Fund, that teaches girls ages 11-18 empowerment, advocacy, self-care and leadership skills. In 2017, 34 scholarships totaling $67,000 were awarded to students through GHGH to attend the college of their choice.

“Receiving a GHGH scholarship has made a difference in my educational career. It has allowed me to get a computer to do homework and research, and ultimately succeed in my classes,” said Francisca ‘Frieda’ Rios, a Salinas High School graduate and GHGH participant now attending CSU Monterey Bay. “This scholarship helped me believe in myself.”

Girls’ Safety, Empowerment & Advocacy

In addition to scholarships and the GHGH program, the Women’s Fund expanded its areas of impact. It granted to Rising International’s Safe and Sound Program to combat human trafficking, provided emergency assistance for women at risk of dropping out of college due to financial hardship, and helped a team of local women attend the Women’s Policy Institute of the Women’s Foundation of California.

Thanks to the $1.9 million endowed fund and future legacy gifts, the Women’s Fund can make grants now and in the future to meet changing needs of local women and girls.

www.cfmco.org/WomensFund

“This scholarship helped me believe in myself.”
- Frieda Rios, GHGH Scholarship Recipient attending CSU Monterey Bay
Monterey County Gives! is a year-end campaign that inspires philanthropy and benefits a wide array of nonprofits serving Monterey County residents. It gives donors an opportunity to learn about a range of organizations, and provides a way for both donors and nonprofits to leverage year-end giving for greater impact. A partnership between the CFMC, the Monterey County Weekly, and the Monterey Peninsula Foundation, the program benefits from local businesses, foundations and individuals who contribute to an overall matching fund that spurs donations for participating organizations.

Thanks to Neumeier Poma Investment Counsel, the David and Lucile Packard Foundation, the Cannery Row Company and several CFMC donor advisors, the 2017 overall match totaled $450,000. Participating organizations ask their supporters to donate through the campaign, with each gift, up to $75,000, receiving a percentage match.

In 2017, every measure of Monterey County Gives! set a record: total dollars raised, number of donors, number of participating organizations, challenge gifts and overall match funds. Nearly 5,000 donors contributed amounts large and small to benefit 158 participating organizations. Thousands of residents countywide will benefit from the money raised.

The CFMC sponsors three special awards for Monterey County Gives! The Ingenuity Award is a $2,500 grant for the best “Big Idea” in the campaign. The Epicenter won for its program to provide foster and LGBTQ+ youth with leadership and employment experience, putting kids on a path to career and life success. Peace of Mind Dog Rescue received $1,000 for having the most donors overall, and the Monterey Museum of Art received $1,000 for having the most donors between the ages of 18-35.

Every year the campaign goes beyond our expectations. Its success shows how charitable Monterey County can be, while creating opportunity for new donors and generating awareness and resources for participating nonprofits. Learn more at www.MontereyCountyGives.com.
The Center for Nonprofit Excellence (CNE) works to strengthen the resources, leadership, management, collaboration and advocacy that increase nonprofits’ ability to meet their missions. To have the greatest impact, the CNE seeks to leverage its efforts through careful listening and evaluation, which informs future programming.

Next Steps for Small Nonprofits
CNE heard from smaller organizations that many resources assume a level of staffing not possible on their limited budgets. In response, CNE developed the Next Steps for Small Nonprofits program, which strengthens nine such organizations with three-year funding, mentoring and workshops. To expand the opportunity, CNE repeats these workshops for other small nonprofits.

Next Steps grantees are starting to see the impact of their focus on organizational strengthening. Many have expanded their boards, increased fundraising, and made strategic choices about programming.

“Next Steps helped us focus on developing our infrastructure and overall organization. Through the invaluable guidance and expertise of the mentors, we developed strategic plans to help make us more sustainable so we can grow our mission,” said Emma Paoletti, Development Director, Orchestra in the Schools.

Nonprofit Survey Launched
In the fall of 2017, the CNE launched another listening opportunity, its Nonprofit Survey. The survey, which will be conducted annually, allows us to hear directly from local nonprofits about their strengths, challenges, and interests. With over 200 responses, the results help focus CNE’s work in 2018 and beyond. For more information, survey and resources, visit www.cfmco.org/CNE.

“Board development, financial structure and volunteers/staffing have ALL been impacted and Hope, Horses & Kids now has a strong, solid foundation to build on. The mentors, workshops, peer involvement were almost more important than the funds we received. Because of the excellent resources, we have met and exceeded our milestones.”

- Lori Tuttle, Executive Director, Hope, Horses & Kids
George Somero, from Minnesota, and Amy Anderson, a California native, connected over their shared love of biology on a research vessel to the Galapagos Islands to study the creatures found in the nearby deep-sea hydrothermal vents. Both Ph.D.’s in Biology, she from U.C. Santa Barbara, he from Stanford, they served as faculty for Oregon State University before moving to the Monterey area in 1995. George taught at Stanford University’s Hopkins Marine Station, where he is currently the David and Lucile Packard Professor Emeritus of Marine Science. He has published several books on biochemical adaptation, and frequently travels to China for scientific research.

Amy, an accomplished cellist from the age of nine, needed more music in her life, and quickly became involved with Chamber Music Monterey Bay (CMMB). Amy served as President for many years and as Artistic Director for over 20 years. She stepped away from full time duties in 2017, but remains connected as a board member and Artistic Director Emeritus. Both love music, and they have supported the commission of several new chamber works at CMMB.

They learned of the Community Foundation through CMMB, where Amy participated in numerous workshops presented by the CFMC’s Center for Nonprofit Excellence. After CMMB established a stewardship fund to take advantage of the foundation’s investment expertise, Amy and George created their own donor advised fund to facilitate their giving in 2010.

With no children to provide for, they give freely to the causes they care about. “We’re lucky to have the ability to give. We both feel strongly about focusing on our local community. With national organizations, your donation can be a drop in the bucket. By giving to organizations in our area, we can have a greater impact,” says George.

Giving Together
They appreciate the CFMC’s grant opportunities. “Arts, environment and land use are passions of both of ours. The foundation brings different ideas to our attention – new things. It lets us know about organizations we wouldn’t otherwise hear about. It’s nice to have a trusted source for that information,” says George. “We also enjoy Monterey County Gives! and make that part of our annual giving.”

Giving Now and in the Future
“We want to give now during our lifetimes to help strengthen our communities today. It’s liberating to make a list of what concerns us and have a conversation about it. It’s wonderful to be able to give together,” says Amy. “Choosing the Community Foundation as a vehicle for our legacy giving reflects our confidence in the organization. We appreciate the fact that the Community Foundation will honor our intent in case the organizations we care about cease to exist,” she added.

Here for Good
“The CFMC makes giving so easy. It’s an infrastructure for philanthropy that you can tap into at any level,” George notes. Adds Amy, “It’s a wonderful way to connect to your local community. You learn so much about what’s going on. There are very supportive people involved. I feel so lucky that it’s here!” George sums it up this way, “Your tagline is real – you’re ‘Here for Good!’”

Amy and George are here for good too. Their home reflects their travels and love of art, music and color. They brighten the lives of others now and their legacy of giving will continue to reflect their passions in the future.
### CFMC FAMILY OF FUNDS

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<th>Affiliated Groups</th>
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* New Fund Created in 2017
** New Fund Created in 2018
LEAVING A LEGACY

A planned gift is one of the most meaningful and personal ways to give. With thoughtful estate planning, you can rest assured your philanthropic resources will communicate your values and provide impact for generations to come.

“...It’s very fulfilling to know that the CFMC will maintain my vision and my giving will benefit my favorite causes, in my name, into the future.”

- Jim Valentine, Dr. James Valentine Fund, Legacy Society Member

www.cfmco.org/Valentine

Stewardship

The Community Foundation for Monterey County fulfills each donor’s wishes so you can have peace of mind knowing your intentions will be honored in the future.

Legacy Society

The Legacy Society honors those who have named the Community Foundation for Monterey County in their estate plan, contributed more than $25,000 to an endowed fund, or established an endowed fund during their lifetime. Members are invited to an annual luncheon to learn about the impact of legacy giving.

If you have included the CFMC in your estate, please let us know so we may recognize your generosity. Legacy Society members may also choose to remain anonymous.

The CFMC’s Guide to Planned Giving can help you explore the many available options to create your own legacy of giving. To learn more, visit www.cfmco.org/Legacy

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Daniel R. Baldwin and
Anne Ylivsaker
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Richard Zahm*

* In Memoriam
“Working with the CFMC opened doors to programs that are important to us. Their efforts and community knowledge are invaluable.” - Tony and Lary Lynn Muller
The Anthony and Lary Lynn Muller Fund

“We are about changing people’s lives by giving them an opportunity. If I can help with tuition so employees can further their goals, then that’s what we need to do. I wanted to work with the best, and the CFMC is the best.” - Raymond Costa
Raymond H. Costa Family Scholarship Fund

“When you remember the goodness of others it stays with you. So when you can give back, you are paying it forward.”
– Tonya Antle
Rick and Tonya Antle Fund, Legacy Society Member

“Giving through our fund has brought us closer to organizations we’re interested in. With no close family, it’s good to know someone will be here to fulfill our wishes after we’re gone.” - Peter and Anne Thorp
Peter and Anne Thorp Fund, Legacy Society Members

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Peter and Anne Thorp Fund, Legacy Society Members
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Richard and Mary Pat McCormick
Janice McDonald
Debra and Michael J. Hamill
Monterey Free Libraries after-school homework center

SPCA Monterey County offers compassionate care for local animals of all kinds

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In Memory of George Kriste
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Peter and House and Carol Childs
Steven Hoyte
Ariane Hudson
Marjory Ingersoll
J. Lawrence Khaki’s Clothiers
Kimberly Jalab
Vanessa Jackson
Kurt and Sue Jaggers Fund at Fidelity Charitable
Anne Marie Janeway
Kevin Jenkins
Kristina Jett
The Johansson Foundation
Shirmae Jones and Michael Baer
Karen Kalvelage
Howard Kanner
Lisa Kearny
Robert M. Keaney
Dan Keig
Robert Kent
Samar Khouri
Carole King
Kathryn Kranten
Kriezman Family Foundation
Shirmae Jones and Michael Baer
Cheryl Lathrop and Bern Beecham
Wayne and Maureen Lloyd
Lavengood
Catherine Lehrberg
Aaron and Sheila Liebovich
J.R. Lemos
Laura Lendrum
James and Jill Lentowski
Jean Lovell
Lloyd and Carol Lowrey
Dan and Shelly Mitchell Lynch
Lizabeth Anne Lynner
Kirk MacKenzie Gift Fund at Fidelity Charitable
James and Diane Mapson
Mike and Tobh Marcus
Paul and Susan Martin
Rebecca Marx
Samuel and Barbara Maskat
Sandra Masur
Jana Mead
Edward and Carmine Penhoet
James and Kate Petras

Sponsorship acknowledgments and list of contributors.
The list of Distinguished Trustee honorees is impressive. The award is presented by the CFMC annually at the Celebration of Philanthropy to honor those who have demonstrated philanthropic leadership in supporting nonprofits in Monterey County.

David and Susan Gill, the 2017 recipients, have humbly, quietly and steadily been active donors and volunteers for dozens of nonprofit organizations from King City to Monterey.

“Theyir decades of involvement and leadership have inspired and encouraged others and helped change lives through their support of education, sports, health, and the arts,” said 2017 board chair Steve McGowan.

They know their community well. David grew up working on the family farm on the outskirts of King City. A third-generation grower, he heads Rio Farms and Gills Onions and is recognized as a leader in the agricultural industry. David heads Hartnell Community College’s agriculture committee and chairs The First Tee of Monterey County.

Susan, a former educator, has been a steadfast supporter of local libraries and co-chaired the campaign to build the Hartnell Community College King City Education Center. She has served as a board member, fundraiser extraordinaire and hands-on volunteer for more than a dozen organizations.

The Gills believe education is a powerful equalizer. They support many scholarships for promising local students that help them achieve their goals. “Susan and I really like to focus on youth organizations that help influence youth and support education,” said David.

They have been instrumental in the campaign to restore and retrofit Mission San Antonio de Padua in South County. The Gills are also Founding Family members of, and generous donors to, the Southern Monterey County Foundation, the CFMC’s first affiliate fund, which provides grants to benefit communities from King City to points south.

As Steve McGowan concluded, “The Gills’ wide-ranging, consistent and generous contributions of their time, energy, talent and resources is an incredible example of philanthropic leadership. Their passion to give back makes them a ‘dynamic duo’ for doing good.”

**Distinguished Trustee Honorees**


**“Giving means so much to both of us. We have seen the direct benefits within our community.”**

– David and Susan Gill
The Carmel Foundation brings seniors together for a variety of activities and services.

Youth Music Monterey offers in-school musical education.
Center for Nonprofit Excellence strengthens nonprofits
Everyone’s Harvest runs local farmer’s markets
Big Sur Health Center provides wellness check ups

Michael K. McMillan
Knox and Carlotta Mellon
Albert and Elaine Menchaca
Flo E. Miller
William W. Monning and Dana T. Kent
Monterey Peninsula Dickens Fellowship
Robert E. Montgomery, Jr.
and Susan Meister
E. Philip Morgan
Karín Morrell
Randall and Patricia Morris
Fund of the Silicon Valley
Con McMillan Foundation
Honor Muller
Donna L. Murphy
Karen A. Murray
Deborah M. Nelson
Conn O’Neil and Sarah L. Newberry
Lowell III and Wilda Northrop
Joyce Odem
Christopher and Wendy Ogin
Lois R. Olsen
Susan Osorio
Janna L. Ottman
Cynthia Parham
Joyce Park
Pass the Word Ministry
The Paul Davis Partnership
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Jacqueline Pierce and Michael Masuda
Princess Monterey Whale Watching
Betty Ann Ranagan-Fisher
Rex and Joan Reade
John Rathke
Thomas and Virginia Robertson
Brian Robinson and Barbara Carroll Robinson
Kathryn A. Ryan Thauman
Susan Sailow
Milo W. and Mary Scherer
Georgina and Deidre Schraeder
Anonymous
In Honor of Linda Keill
Anonymous (2)
In Honor of Marie Canepa
Anonymous
In Honor of the Three Amigos
Anonymous
In Honor of Linda Keill
Anonymous (2)
In Honor of Marie Canepa
Anonymous
In Honor of the Three Amigos
Barbara J. Baldock and Phillip N. Butler
In Honor of Marian Penn
M. Susan Dittrich
In Honor of Bill and Cathy Hines
April L. Fleeman
In Honor of Michael McMillan and Laura Hunter
Katherine N. Freitas
In Honor of Leslie Gayer
Mission Trail Lions Club of Carmel
In Honor of Rebecca Doggett
Alda M. Morgan
In Honor of Michael Reid
David S. Sabin and Anna Swartley
In Honor of all those who struggle
Lara Shipley
In Honor of Sheila Benson, Susan Ditzler, Linda Frederiksen, Kathy McMurdo and Marian Penn
Kathleen M. and Eileen Whitson
In Memory of Chucky
Kozue T. Knowles
In Memory of Marybeth Downs
Donn and Alda Morgan
In Memory of Gordon Nakagawa
Jeanne Nakagawa
In Memory of Linda Baker Smith, Karen Bigley Williams, Edna Hill and Eva Hilsay
Karlen Poma
In Memory of genie Santini, from Jodi Brown, Nora Deans, Elizabeth Hull, Tina Magill, Kathy Miller, Jeanne Mills and Claudia Sammis
Claudia C. Sammis
Chip Hooper Foundation
John Duffy McSwiggan
Ruperta Jungie Records, Inc.
Cappy Martin/Vernon Hurd
Monterey Rotary Club Fund
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Daniel, Jr. and Sharon Albert
Carl Anderson
Dan Baldwin and Anne Yvisaker Fund of the CFMC
Brad and Rosemarie Barbeau
Richard and Renata Barnwell
Carmel Monterey Travel Agency, Inc.
Anthony Cosentino
Richard D. Croxwell
The Honorable William D. Curtis
Jeff and Kelly Davi
Robert and Patricia Deal
Daniel P. and Vanessa G. Diffenbaugh
DL Communications
Marilyn Dunn Gustafson
Estates of Norman W. Miller
William Falor
Susan Freeland and Kenneth Schley
Frank R. and Kathleen M. Geisler
Jonathan G. Geisler
Lynn Goldstein
Joseph K. and Marilyn Green II
Russell D. and Monta L. Hines
Michael C. and Sandra Hendrickson
Ronnie Higgins
Denis R. and Claire Horn
Eric S. and Kathleen Johnsen
Rolf E. and Margaret W. Johnsen
Nolan M. Kennedy and Debhi Johnsson
Rick and Martha Kenner
Robert and Norma Klevan
Nancy Kotowski, Ph.D.
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Clayton C. Larson
M3 Environmental Consulting
Robert F. and Sarah R. Martin
The Mattzik Group
An McDowell and Dan O’Brien
Jeffrey and Elizabeth-Anne McMullen
Rupert Miller
Robert and Leslie Mulford
Gilbert M. Neill and Rod Woodard
Ben Nurse
Dennis M. O’Brien
Richard J. and Margaret Pagnillo
Rob Pappani
Stephen Pearson
Rotary Foundation - Rotary Club of Monterey
Terrance D. and Dannie Lee Ryan
Bret Silvestri
Dennis M. Skelton and Elizabeth Hirsch
The Snorf Fund of the CFMC
Kim Stermer
Jennifer Stone and Lew Thaddeus
Clark and Toshia Struve
Thompson Law Office
J. Brock Tostevin
Uyeda and Associates
The Alexander F. Victor Foundation
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William S. McAfee
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Jay and Kip Hudson
Wiley Family Trust at Fidelity Charitable, Suzanne Taunt
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Janna L. Ottman
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Linda Vogt
Pacific Grove Public Library Fund for the Future
Anonymous
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Anne Carville
Mark Chakwin
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Erin McGraw
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Ben and Mary Ann Whitten
Fund of the CFMC
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Alison Bagou
In Honor of Susan Steele
Kim Bui-Burton and Steven L. Silvera
In Memory of Nancy Hauk
Anonymous
In Memory of Mary Len Wartenberg Denzinger
In Memory of Phyllis & Warren Sinclair
Ken and Susan Stempson
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Emerson Family Fund
Pacific Repertory Theatre
The David and Lucile Packard Foundation
The David and Lucile Packard Foundation
Nicholas M. Pasculli
Nicholas M. Pasculli
Child of Peace Dog Rescue
Stewardship Fund
Georgie Johnson and Debra Couch
Eilin Gelson
Center for Photographic Art
Anonymous
Monterey County Pops Stewardship Fund
Monterey County Pops!
Monterey County Rape Crisis Center Stewardship Fund
Monterey County Rape Crisis Center
Monterey County Weekly Community Fund
Nearly every community contributed through Monterey County Gives!
See full list at www.cfmco.org/mcgives
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Raul and Ana Rodriguez
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Laura Sims Fund
Laura Sims Reynolds
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Andy and Steffanie Smith Fund
Andy and Steffannie Smith
The Snorl Fund
Charles and Leslie Snorl
Sobrerescue Fire Fund
The American Institute of Food and Wine, Monterey Bay Chapter
Erik Anderson
Don Mitton Dining, Inc.
The GE Foundation
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Linda Benway
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Bumbalough
John and Janet Buttgeret
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Richard and Sharon Casey
Chevron
Robert and Allie Cullen
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James and Colleen Ewart
Michael and Denise Hardoy
Michael and Jamie Lynn
Jones
Peggy Keirn and Connie Bauer
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Vincent Lopez and Tina Starkey
Lopez
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Center for Photographic Art
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Steck
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Friends of Sunset Foundation Sunset Theater Endowment Fund
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Frederick W. Terman and Nan Borreson
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Harold Kinnaman
Kenneth and Leslie Morishita
Debra Noyes
Don L. Powers
T. J. and Shirley Scott
Sea Mist Farms
Masaye Tanimura
Ronald and Bonnie Yokota
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Sherrie Lazzerini
In Memory of Hugo Tottino
Anonymous
August J. Ameral
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Claudette L. Zei
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Tom and Nancy Pesce
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Albert Pieri
Gregory A. and Winona Plank
Debra Popma
Rita Richardson
Elio and Joy Rodoni
Daniel and Kathryn Romero
owers and Laura Powell
Frank E. Silvia, Jr.
Clark and Toshiro Shue
Gary and Mayumi Tanmura
Uni-Kool Partners
Valerie A. Murphy
Mary T. Vignetti
Brenda Watkins
Charles and Sherry Watts
Western Precooling Systems
D. Clark Whittle, Jr.
Kean and Susan Stempson
The American Institute of Food and Wine, Monterey Bay Chapter
Grants and Program team members Karina Gutierrez-Barboza, Janet Shing, Josh Warburg, Lauri Lee-Alexander and Aurelio Salazar, Jr.

John and Nancy Durein
Stephen W. Dyer and Cynthia Martin Dyer
Jean H. Engvall
W.R. & M.H. Gould Trust
Gerald A. and Janet Graebe
Jay and Kip Hudson
Donald and Alison Imamura
James L. and Louetta Langley
Douglas C. Lee
John and Ann Mahoney
Dennis R. and Susan Mar
Admiral Henry H., Jr.
and Peggy Maiz
Alan W. and Marilyn McMasters
Claudia Mauny Nemir
Wade H. Reese
Richard Rhodes
James and Susan Ricketson
Robert and Susan Lea Living
William and Kathleen
Wojtkowski Fund
Nels P. and Jill Wiegand
Ben and Mary Ann Whitten Fund
Jackie Wendland
Central Coast VNA and Visiting Nurses Association
and Stephen and Betty Ferry
Ventana Wildlife Society Fund
Tom and Julie Anne Hopkins
Ventana Trails Forever Fund
Brook Krager
Randy May and Carol Greenstreet
Ventana Wilderness Alliance Fund
Tom and Julie Ann Hopkins
Ventana Wildlife Society Fund
Stephen and Betty Ferry
Visiting Nurses Association and Hospice Stewardship Fund
Central Coast VNA and Hospice
The Jackie and Mark Wendland Fund
Jackie Wendland
Ben and Mary Ann Whitten Fund
Benjamin and Mary Ann Whitten
Wiegand Family Foundation
Nels P. and Jill Wiegand
Bill and Kathi Wojtkowski Fund
William and Kathleen Wojtkowski
Wold Family Foundation
Eby Wold
Martin R. Wolf Family Fund
Martin and Francesca Wolf
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Leonaard J. Anable, Jr.
Amy Anderson and George Somero Fund of the CFMC
Augustinia’s Designer Boutique, Inc.

David and Laurie Benjamin
Sarah Berling
Jason and Melissa Burnett
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William and Nancy Doolittle
Foxy Couture
Dawn Galante
Krista Hanni and Scott Davis
Jack and Stephanie Harkness
The Pat and Al Jackie Henning Fund of the CFMC
Rod and Anne Hepfl
Jay and Kip Hudson
J. D. and Missy Jensen
Elizabeth Kurzawa
The Landreth Family Fund of the CFMC
Paul Lawrence and Mariann Buccafurmi
Pam and Giff Lehman
Marsha J. Lubow
Robert J. and Marli Melton
Joyce and Gloria Mikuls
Clare Mounteer
Bill Mullally
Esmeralda Owen
The Peggy and Jack Baskin Foundation
Laura Sinks Fund of the CFMC
Jennifer Smith and Douglas Holtzman
Valentin Fund of the CFMC
Lovell and Joanne Webster
Jennifer White
In Honor of Oren Townsend & Darrell Beckham, Anthony & Nadine Townsend, Clarissa Miller, Anna Marie Lopez, Mary & Patrick Casey, Carol Chamney, Linda Hanger & Dan Finklea, Heather Hubanks, Nancy & Gary Moon, Natalie McChesney, Dora, Mario and Rick Lopez, Kent & Laura Ducos, Tobi Marcus, Christine Wingen and Stephen St. Germain, Joanne Perron, and Ruth and Mike Rachel
Traci Townsend-Gieg
In Honor of the Women’s Fund Leadership Council
Yvonne A. Ascher, Esq.
In Honor of the Women’s Fund Leadership Council
Christine Dawson
Youth Fund
David G. Huey and Carla Hudson
Youth in Wilderness Fund
Anonymous
Marsha McMahen Zelus Fund
Marsha McMahen Zelus
Zeve Fund
Bradley Zeve
Other Gifts
Anonymous
American Water Charitable Foundation
Robert P. Balies
Lindvood Bank
The GE Foundation
Phoebe Helm
Herman Sisters Corporation
Don and Carol Hilburn
Patricia Hughes
Joseph S. and Karen Iwan
Eric S. and Kathleen Johnsen
Albert and Vicki Norman
John B. O’ Sullivan
Richard J. and Margaret Pagnillo
Florence T. Speck
David M. Spradling
Alice K. Tao
Event Sponsors
1st Capital Bank
Sheila Allaiar
Alvarez Technology Group, Inc.
Tonya Antle
Augustus’s Designer Boutique
Bank of America
Bianchi, Kasavan & Pope, LLP
Lucia Boggiaito
Sarah Boucher
Kevin Cartwright
Contemporary Catering
Margaret D’ Arigo-Martin
Dawns Dream Winery
Driscoll’s
Hayashi Wayland
IMPOWER
International Paper
KCBX FOX 35
Land Rover
Jane McCoy
Monterey County Weekly
Monterey Trust Management
Konny Murray
National Medical Foundation
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Pebble Beach Company
Ken Petersen
Rabobank
Salinas Valley Memorial Healthcare System
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Nina Alcaraz
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Luis Chabolla
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Lisa Corpuz
Aimad Jaddia
Esther Curcitize
Steve Dennis
Anna Foglia
Carmen Gil
Juan Gomez
Dan Griffee
Rae Gularte
Cynthia Holmsky
Henry Martin
Sarait Martinez
Brooks McChesney
Cristina Medina-Dirksen
Adriana Melgoza
Barbara Mitchell
Bronwyn Moreno
Vicki Nelson
Ricardo Nunez
Paz Padilla
James Pisciotti
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LEAD Coaches
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Windsor Lindor
Kay Logterman
Tobi Marcus
Evelin Martinez
Diane Ortiz
Rebecca Perry
Michelle Slade
Ron Wormser
Stanford Alumni Consulting Team
Barbara Bishop
Jim Graber
Sandy Hale
Catherine Hambley
Bruno Kaiser
Alex Lilley
Brooks McChesney
Denny Paul
Ian Phillips*
David Warner
Ron Wormser
* In Memoriam

Venues
1st Capital Bank
Corral de Tierra Country Club
Harden Foundation
Hyatt Regency Monterey
Monterey Plaza Hotel & Spa
Point Lobos Foundation
rancho Cielo

“The Community Foundation Means ‘trust.’ It’s this wonderful joy of feeling part of the future even after you’ll be gone. The most joy comes from giving to what’s closest to your heart.”
– Bertie Elliott, Legacy Society Member
The $16.7 million granted in 2017 was distributed in a variety of program areas throughout Monterey County and beyond. Following is a breakdown of grants by area, geography and fund type.

**GRANTS BY PROGRAM AREA**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Services</td>
<td>29.9%</td>
</tr>
<tr>
<td>Education</td>
<td>15.2%</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>16.1%</td>
</tr>
<tr>
<td>Religion Related</td>
<td>1.8%</td>
</tr>
<tr>
<td>International &amp; Foreign Affairs</td>
<td>0.9%</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>6.9%</td>
</tr>
<tr>
<td>Environment</td>
<td>5.4%</td>
</tr>
<tr>
<td>Public &amp; Community Benefit</td>
<td>11.3%</td>
</tr>
<tr>
<td>Health</td>
<td>12.5%</td>
</tr>
<tr>
<td>Salinas/Salinas Valley</td>
<td>12.1%</td>
</tr>
<tr>
<td>Monterey Peninsula</td>
<td>15.6%</td>
</tr>
<tr>
<td>Countywide</td>
<td>46.2%</td>
</tr>
</tbody>
</table>

**GRANTS BY REGION**

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside Monterey County</td>
<td>11.1%</td>
</tr>
<tr>
<td>Monterey Peninsula</td>
<td>15.6%</td>
</tr>
<tr>
<td>Countywide</td>
<td>46.2%</td>
</tr>
<tr>
<td>Salinas/Salinas Valley</td>
<td>12.1%</td>
</tr>
<tr>
<td>North County</td>
<td>1.1%</td>
</tr>
<tr>
<td>South County</td>
<td>1.1%</td>
</tr>
<tr>
<td>Multiple Areas</td>
<td>2.8%</td>
</tr>
<tr>
<td>Big Sur</td>
<td>9.3%</td>
</tr>
</tbody>
</table>

**GRANTS BY FUND TYPE**

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor Advised</td>
<td>$10,661,299</td>
</tr>
<tr>
<td>Community Impact</td>
<td>$2,345,649</td>
</tr>
<tr>
<td>Designated</td>
<td>$1,834,259</td>
</tr>
<tr>
<td>Discretionary</td>
<td>$818,294</td>
</tr>
<tr>
<td>Scholarships &amp; Awards</td>
<td>$745,169</td>
</tr>
<tr>
<td>Special Project</td>
<td>$94,876</td>
</tr>
<tr>
<td>Opportunity</td>
<td>$76,154</td>
</tr>
<tr>
<td>Organizational Development</td>
<td>$53,849</td>
</tr>
<tr>
<td>Neighborhood Grants Affiliate Fund</td>
<td>$50,000</td>
</tr>
<tr>
<td>Pass-Through</td>
<td>$27,200</td>
</tr>
<tr>
<td>Total</td>
<td>$16,750,750</td>
</tr>
</tbody>
</table>
CONFIRMED IN COMPLIANCE WITH NATIONAL STANDARDS FOR U.S. COMMUNITY FOUNDATIONS
MEMBER, LEAGUE OF CALIFORNIA COMMUNITY FOUNDATIONS

FINANCIALS
Community Foundation for Monterey County

CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2017

ADDITIONS
Contributions* $40,884,973
Other income 377,103
Total revenues and support 41,262,076

INVESTMENT GAIN 23,946,356

GRANTS AND EXPENSES
Grants* 15,346,311
Other operating expenses 3,170,202
Total grants and expenses 18,516,513

INCREASE IN NET ASSETS 46,691,919

NET ASSETS
Beginning of year 167,128,328
End of Year $213,820,247

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

CONFIRMED IN COMPLIANCE WITH NATIONAL STANDARDS FOR U.S. COMMUNITY FOUNDATIONS
MEMBER, LEAGUE OF CALIFORNIA COMMUNITY FOUNDATIONS

CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2017

ASSETS
Cash and equivalents $10,944,308
Contributions receivable 22,043,668
Other assets 31,016
Property and equipment, net 1,721,524
Investments, carried at market value:
  Mutual funds and equities 181,905,413
  Cash and money market funds 13,982,668
  Charitable gift annuities 3,716,462
  Beneficial interest in remainder trusts administered by other trustees 3,067,916
  Investments held in charitable remainder trusts 28,713,398
Total assets 266,126,373

LIABILITIES AND NET ASSETS
Grants payable 1,595,429
Accounts payable and accrued expenses 114,551
Liabilities under split-interest agreements and charitable remainder trusts 22,274,403
Funds held for others 28,321,743
Total liabilities 52,306,126
Total net assets $213,820,247

NET ASSETS
Beginning of year 167,128,328
End of Year $213,820,247

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

YEAR END TOTAL ASSETS

INVESTMENT RETURNS

15.4% Primary Portfolio

14.3% ESG Portfolio

10.2% Medium Term Portfolio
LEADERSHIP

2018 Board of Directors

Ken Petersen, (Chair), President, Monterey Private Wealth
Birt Johnson, Jr. (Vice Chair), Community Volunteer, former General Manager AT&T
Teri Belli, (Treasurer), CPA Owner, tBelli Business Consulting & Advising
Jeff Eikenberry, (Secretary) Retired Senior Vice President, Jackson Family Wines
Betsy Buchalter Adler, Trustee and Program Officer, Claire Giannini Fund
Ida Lopez Chan, Senior Vice President, Wells Fargo Bank
Nolan Kennedy, Attorney at Law, Kennedy, Archer & Giffen
Steve McGowan, Former CFO & Executive Vice President of Corporate Resources, Sun Microsystems, Inc.
Fred Meurer, Owner, Meurer Municipal Consulting
Bill Mitchell, Managing Director, Carmel Realty
Erica Padilla-Chavez, CEO, Pajaro Valley Prevention and Student Assistance
Betsy Pearson, Nonprofit Consultant, Retired President/CEO United Way
Anna Marie Ponce, Owner, Sun Valley Berries, LLC
Michael Reid, Co-founder, Fund for Homeless Women
Bill Sharpe, Professor of Finance, Emeritus Stanford University’s Graduate School of Business
Loren Steck, Retired Psychologist
Abby Taylor-Silva, Vice President of Policy & Communications, Grower-Shipper Association of Central California
Jan Vanderbilt, Vanderbilt Certified Public Accountants
Maija West, Law Office of Maija West
Kenneth Wright, Community Volunteer, Retired California Highway Patrol

We are especially thankful to: Greg Chilton, Catherine Kobrinsky Evans, Rick Kenner, Tina Starkey Lopez for their years of board service, which ended in 2017.

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Christine Dawson, Vice President of Philanthropic Services
Laurel Lee-Alexander, Vice President of Grants and Programs
Diane Nonella, Vice President of Finance and Human Resources
Roya Afsharzada, Controller
Phillip Carey, Accounting Manager
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Cristina Medina Dirkson, Communications Associate
Minnie Elliott, Administrative Coordinator
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Amanda Holder, Director of Communications
Mackenzie Little, Philanthropic Services Associate
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Kaki Rusmore, Director of Center for Nonprofit Excellence
Janet Shing, Director of Grantmaking
Brian Thayer, Senior Philanthropic Services Officer
Josh Warburg, Program and Scholarships Officer

“The CFMC is Here for Good.”
– 2017 Board Chair Steve McGowan
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Tina Starkey Lopez (Chair), Steve McGowan, Ken Petersen

Finance Committee
Teri Belli (Chair), Greg Chilton, Steve McGowan, Fred Meurer, Ken Wright

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Greg Chilton (Chair), Steve McGowan, Fred Meurer, Ken Wright

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In Memoriam

2017

Charles de Guigné
Legacy Society Member

Jean Fitton
Legacy Society Member

David H. Elliott
Friend of the CFMC

Lupe Gomez
Trinidad and Lupe Gomez Family Fund

Davis J. Factor, Jr.
Distinguished Trustee Recipient, Former Board Member, Legacy Society Member

Patricia Kilmarin
John and Patricia Kilmarin Fund

Paul Lawrence
Buccaturn-Lawrence Fund, Legacy Society Member

Lowel Figen
Legacy Society Member

Richard Merrill
Richard and Grace Merrill Fund

Charles de Guigné Legacy Society Member

David H. Elliott Friend of the CFMC

Davis J. Factor, Jr. Distinguished Trustee Recipient, Former Board Member, Legacy Society Member

Lowel Figen Legacy Society Member

Richard Merrill Richard and Grace Merrill Fund

Hugo Tottino Hugo and Dolores Tottino Family Scholarship Fund

Jean Fitton Legacy Society Member

Lupe Gomez Trinidad and Lupe Gomez Family Fund

Patricia Kilmarin John and Patricia Kilmarin Fund

Paul Lawrence Buccaturn-Lawrence Fund, Legacy Society Member

Lowel Figen Legacy Society Member

Richard Merrill Richard and Grace Merrill Fund

Hugo Tottino Hugo and Dolores Tottino Family Scholarship Fund
WHEN TO BEGIN
While anytime is a good time, consider a fund when:

• A financial event occurs (such as the sale of business or estate gift) and you are about to receive new assets
• You update your will or trust
• It is tax-wise to make a gift before year-end
• You are thinking about creating a private foundation

A fund performs much like your own private foundation, but without any of the legal or administrative burdens. It can be created in a matter of hours at no start-up cost to you, compared to the time and financial expense required to create a private foundation. Your gift of $5,000 or more can create a donor advised fund today.

NEXT-LEVEL GIVING
“Our company believes that you share your success and give back to the local community that’s given you so much. We’re excited to take it to the next level by partnering with the CFMC.”
- Vicki & Bill Mitchell, Carmel Realty Company (The Carmel Realty Foundation is a company donor advised fund of the CFMC)

PARTNER WITH US
Individuals, families and businesses can make a difference and enhance their philanthropy through a fund at the Community Foundation for Monterey County in three simple steps.

START A FUND
It’s simple

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

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

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

JOIN US!
Give us a call at 831.375.9712 or learn more at: www.cfmco.org/Donors
THANK YOU!
Our accomplishments are only made possible through your support.

2017 HIGHLIGHTS

- **Granted $16.7 Million**
- **$4.89 Million** Monterey County Gives!
- **Recorded $47.58 Million** in Gifts
- **Doubled Scholarships** $750K Awarded
- **Grew to $267 Million** Total Assets
- **641 Nonprofits Strengthened**
- **Siembra Latinos Fund Created**

Here for Good

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BACK COVER: (l to r) Tatum’s Garden is an inclusive playground, Big Sur International Marathon’s Just Run fitness program engages hundreds of students / Robby Fabry

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