



Here for Good

Community Foundation
for Monterey County

2018 Year In Review

CFMC Board Retreat
January 26, 2019

VISION & MISSION

**Healthy, Safe, Vibrant
Communities**

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

OUR VALUES

We **advance positive change** through grant making, community engagement and collaboration.

We **build a legacy for future generations** through responsible stewardship of the resources entrusted to us.

We **operate with the highest standards** of integrity, ethics and accountability.

We **embrace inclusivity** and diversity.

We **commit to fairness** and respect for the dignity of all people.

We are **open and honest** with our philanthropic partners, grantees and the community.

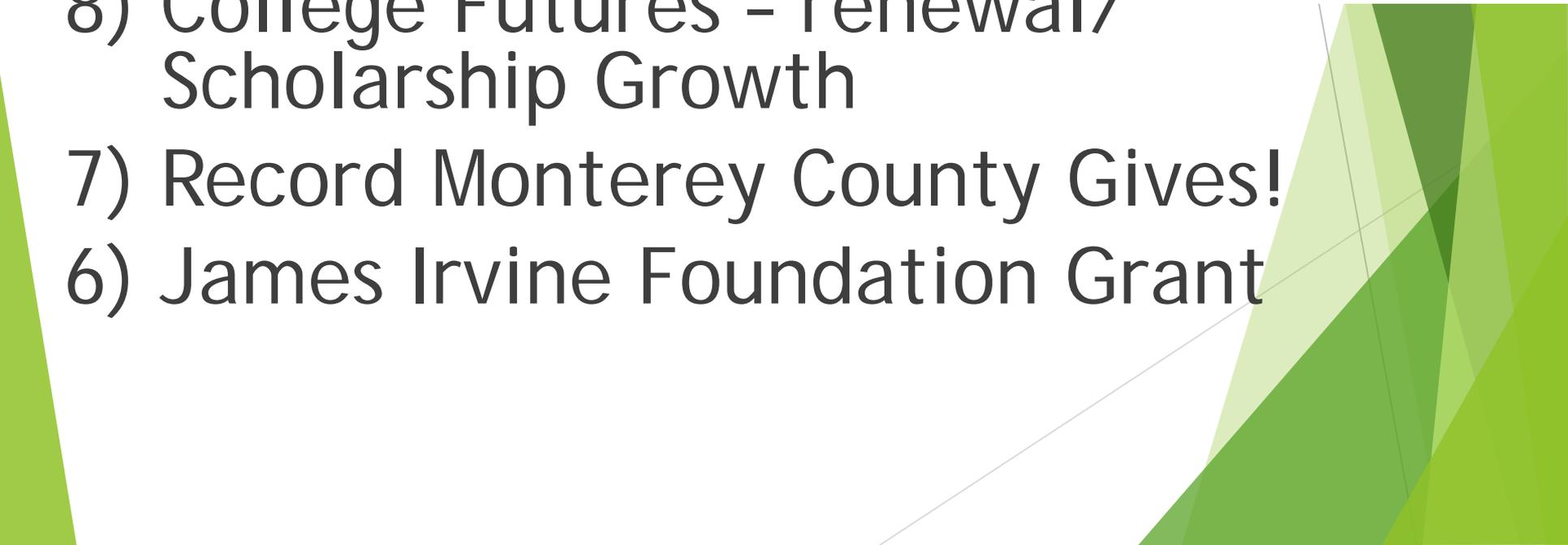
We **strive for excellence** in all that we do.

2018

TOP
10



- 10) CNE Next Steps for Small Nonprofits completed its second year
- 9) Formed Endowment Stewardship Committee
- 8) College Futures - renewal/
Scholarship Growth
- 7) Record Monterey County Gives!
- 6) James Irvine Foundation Grant



2018

TOP
10

- 5) Siembra Latinos Fund Launch
- 4) Addition of Elsa, Jose Luis and Giff to the Board of Directors
- 3) Established Community Impact Investment program and finalized first two loans
- 2) \$22,494,551 Million in Gifts
(\$248,646,102 in Total Assets (1/25/19))
- 1) Record Grants! \$18,747,114
(not including interfund)

Oh, and.....

- Oh, and title of 3200 17 Mile Drive was transferred and the property put up for sale
- Four board members attended Board Fundamentals Course
- Oh, COP, Legacy Luncheon and Women's Fund Luncheon all broke attendance records
- Oh, and we started work on a Big Sur Affiliate Fund
- Oh, and we moved our "server" to the cloud
- Oh, we were the best community foundation we could be...but we strive to be better.



GRANTMAKING 2018

- More than \$18.7 million granted
- Streamlined Neighborhood Grants Program
- Online grant application process continuous improvement
- Next Steps for Small Nonprofits, second year
- College Futures Monterey County - established positive impact and motivated additional investment; \$750,000 renewal grant approved
- Inaugurated James Irvine Foundation pilot regrants project in Salinas. Granted \$315,000 to nine organizations
- Formed Endowment Stewardship Committee



Children & Youth
Development



Health & Human
Services



Environment
& Animal
Welfare

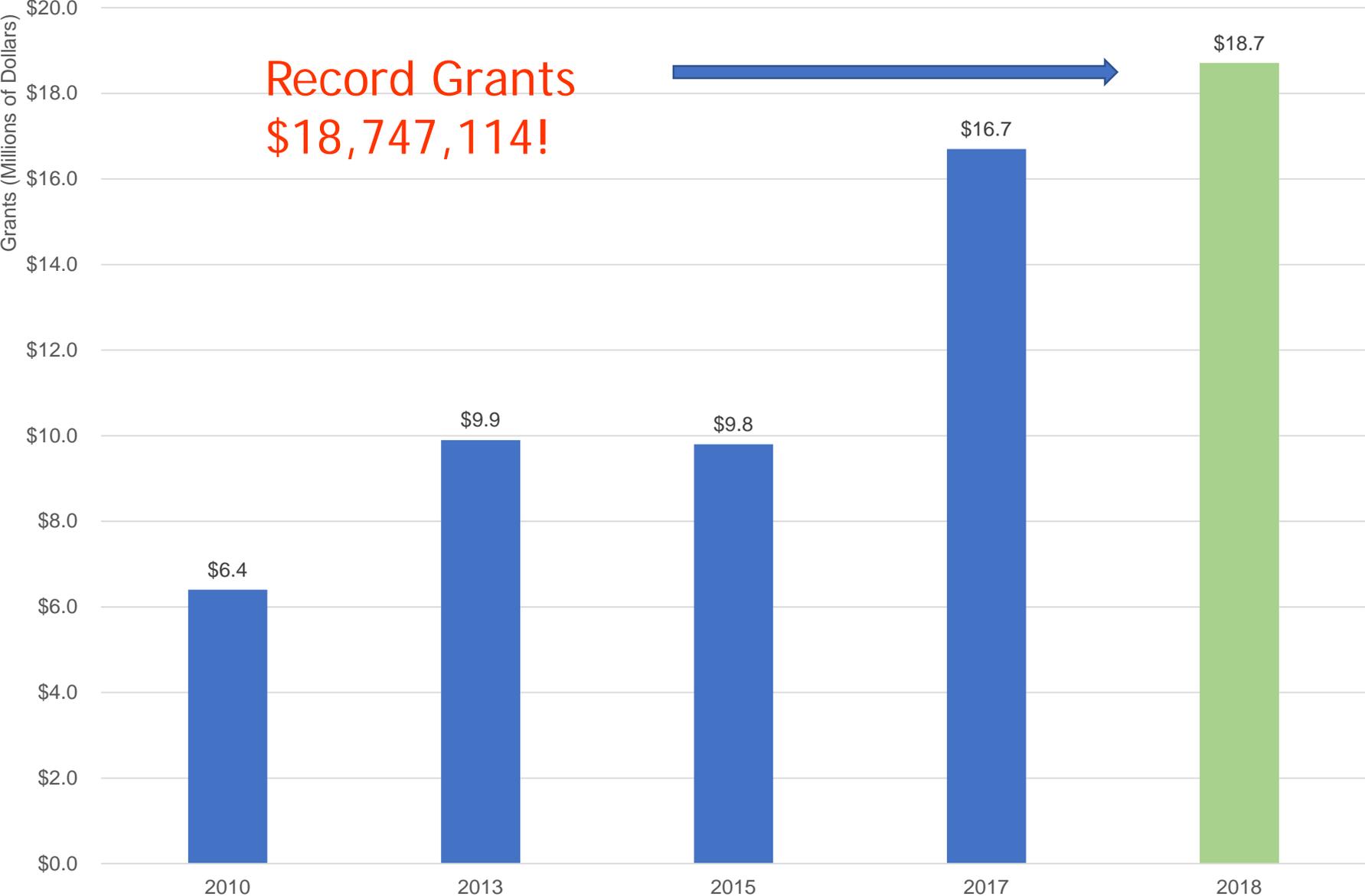


Community
Development

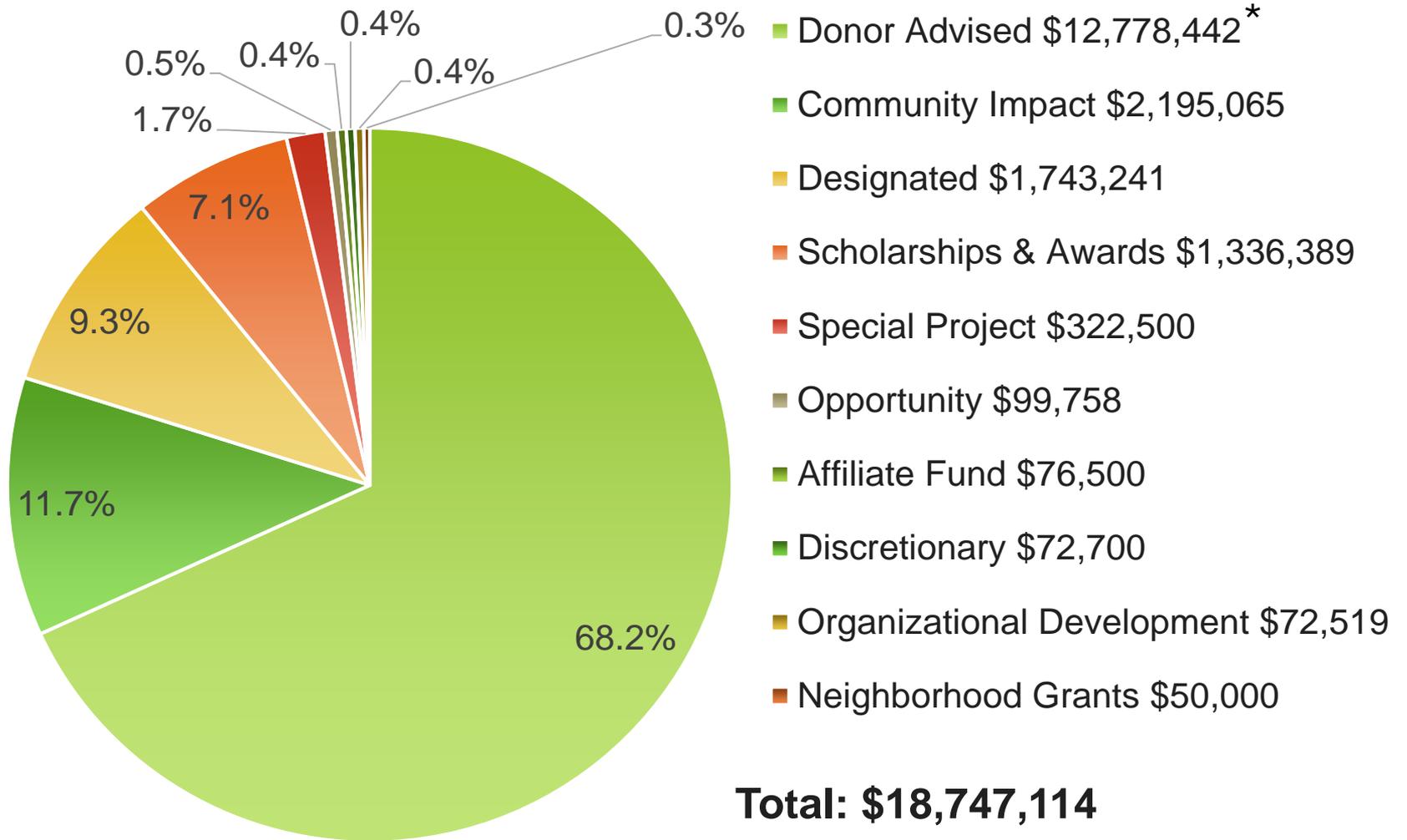


Arts, Culture
& Historic
Preservation

CFMC GRANT HISTORY 2010 - 2018

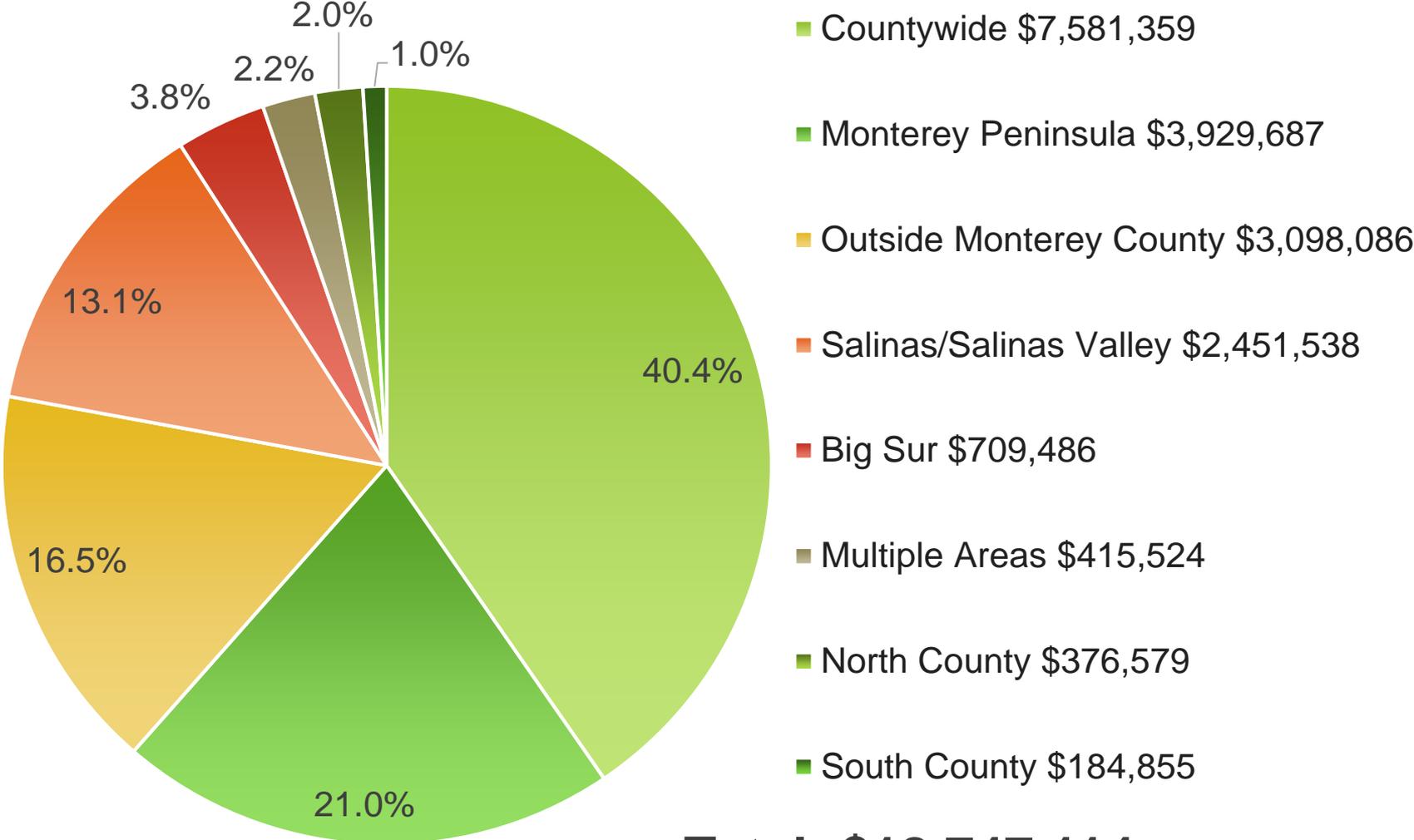


2018 GRANTS BY GRANT TYPE



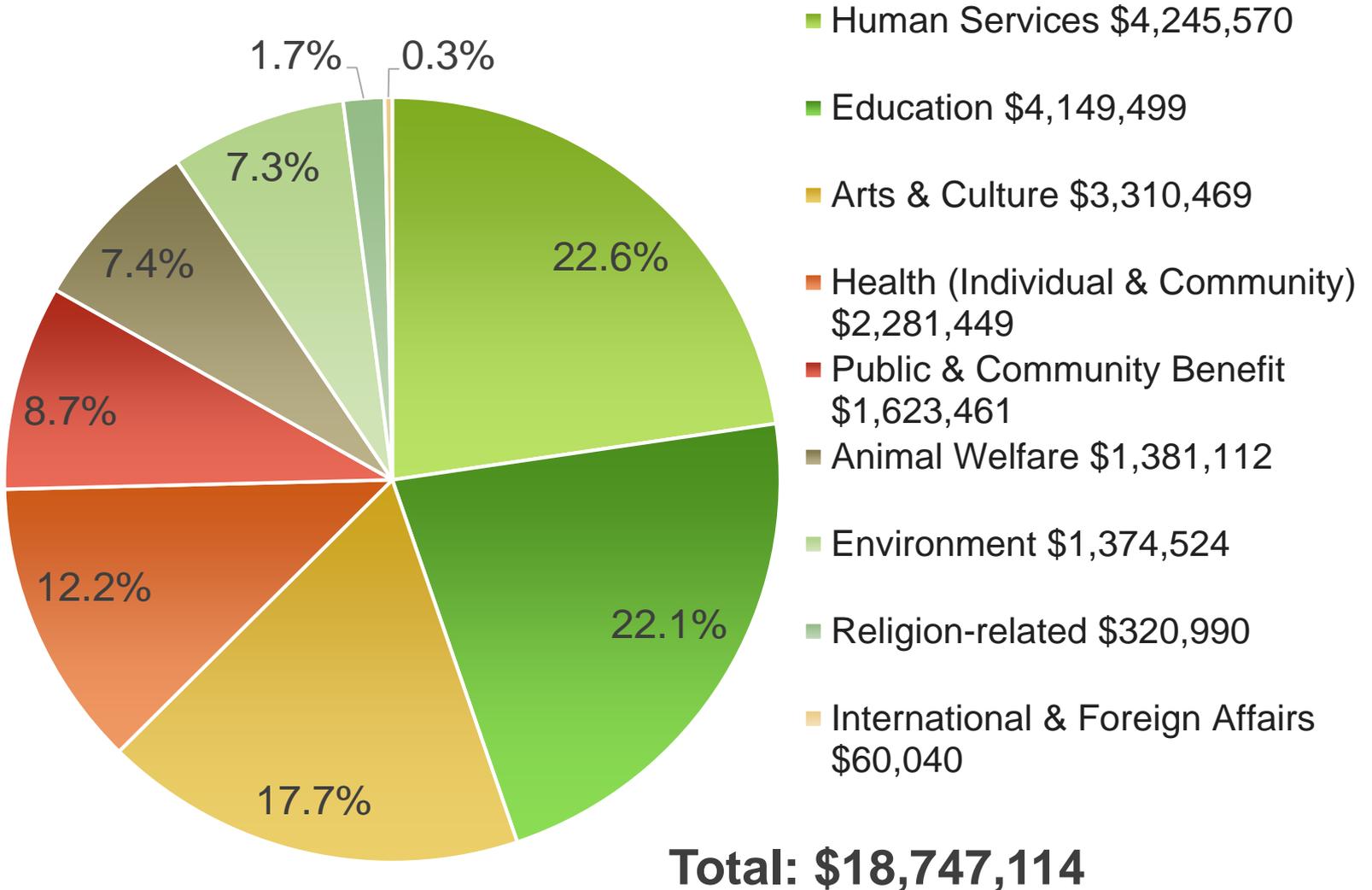
*Note: Donor Advised Grants Include \$4.89 Million from Monterey County Gives!

2018 GRANTS BY GEOGRAPHY



Total: \$18,747,114

2018 GRANTS BY PROGRAM AREA



SCHOLARSHIPS 2018

- Awarded 375 scholarships totaling \$1.3 Million (Increase from 225 totaling \$750,000 in 2017)
- Women's Fund awarded 61 scholarships totaling \$121,000 and granted \$75,000 (Increase from 35 scholarships totaling \$94,500 in 2017)



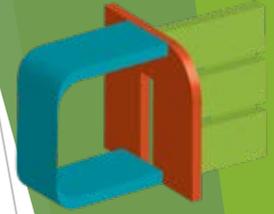
COLLEGE FUTURES 2018

- Awarded 128 scholarships totaling \$434,500 (increase from 65 totaling \$260,000 in 2017)
- 600 students attended workshops in 2018 (increase of 100 in 2017)
- Awarded \$750,000 renewal grant (over 2 years) from College Futures Foundation



NONPROFIT LEADERSHIP 2018 - CNE

- Served 196 organizations overall
- 169 people attended workshops
- Coordinated BoardConnect Reception, ED Retreat & Equity Panel Discussion
- Strengthened LEAD Institute curriculum & Alumni Network
- Partnered with Impact Monterey County, AMC & AFP to provide professional development



center for
nonprofit
excellence



GRANTS & PROGRAMS STAFF CHANGES 2018

- Erika Matadamas, Program Officer
- Michael Castro, Program & Scholarships Officer
- Karina Gutierrez-Barboza, Promoted to Grants and Programs Coordinator

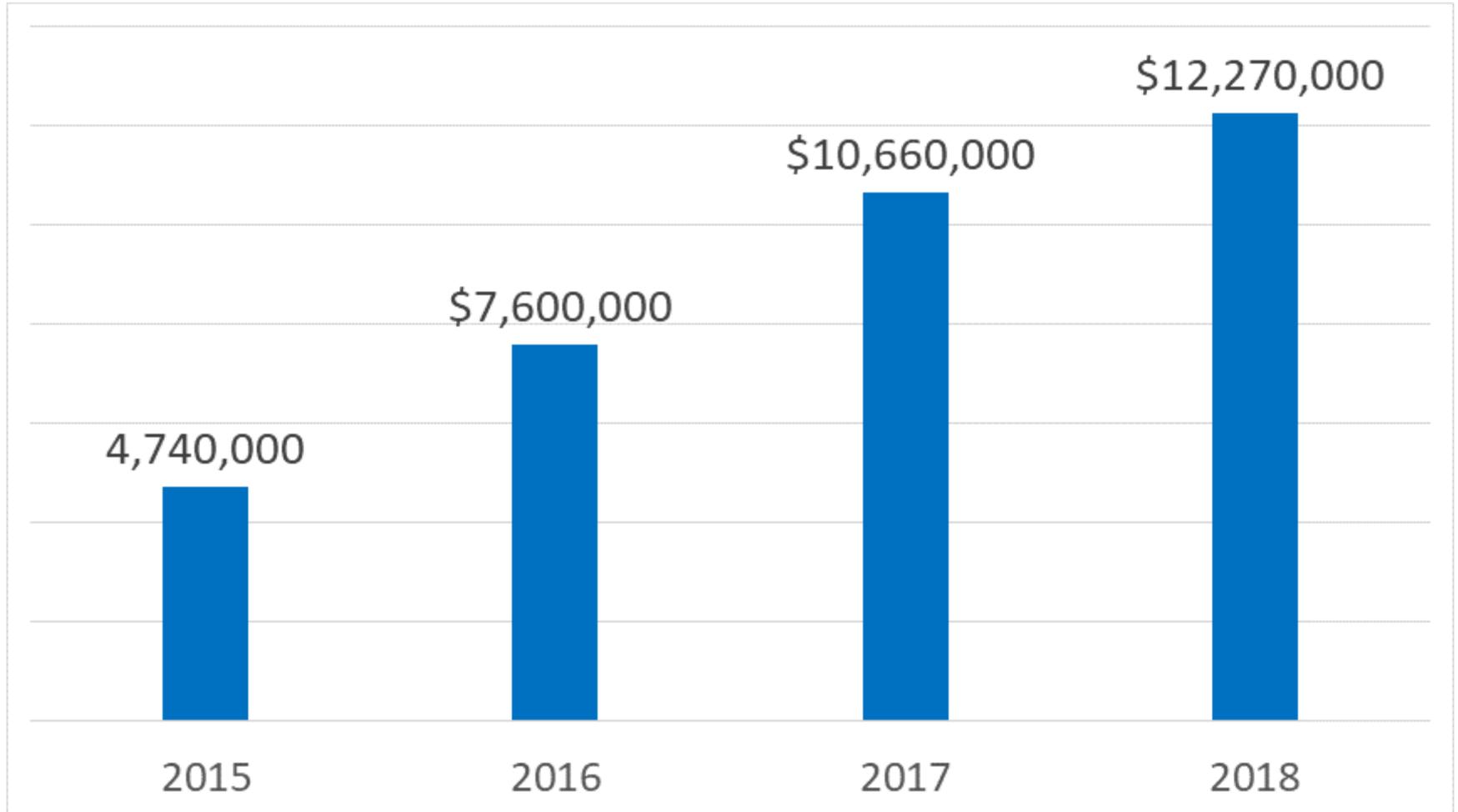


PHILANTHROPIC LEADERSHIP 2018

- \$22.49 Million in Gifts
- Facilitated \$12.27 million in 1,245 DAF grants (Includes MCGives!)
- Grew Legacy Society from 212 to 226 members
- Added more than \$16M to expectancies to total \$223 MM
- Grew relationships with other funding partners: over \$3 million invested from private foundations

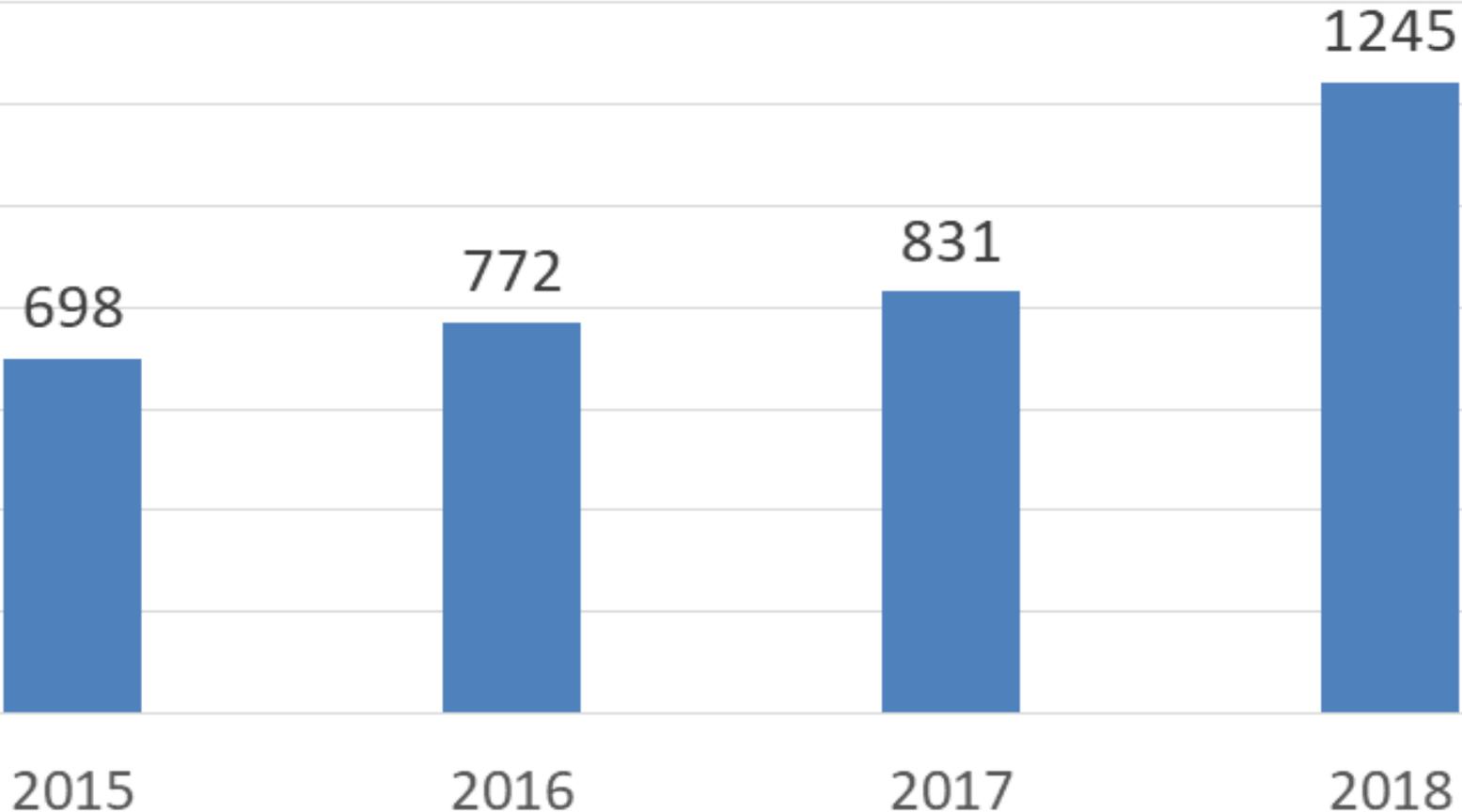


CFMC DAF GRANTS 2015-2018 - DOLLAR TOTALS



CFMC DAF GRANTS 2015-2018 - # OF GRANTS

Donor Advised Grants Number of Grants



PHILANTHROPIC LEADERSHIP 2018

- DAF 2018 Co-Investment:
\$172,000 from 18 funds
- Promoted Family Philanthropy Resources
- Held 4 Donor Education Events
- Provided CFMC PA Council with
Resources & Education
- Created 39 New Funds



NEW FUND BREAKDOWN 2018

Donor Advised: 17

Agency: 10

Scholarship: 9

Designated: 2

Field of Interest: 1

Total = 39



MONTEREY COUNTY GIVES! 2018 (1/22/19)

- Record \$5.44 million raised (11% increase from \$4.89 million in 2017)
- Record match \$508,722 (13% increase from 450,000 in 2017)
- Record Challenge Grants \$982,977 (15% increase over \$850,273 in 2017)
- 4,710 Donors (4,725 in 2017)

MONTEREY COUNTY GIVES!
Joining Together for Big Ideas



AFFILIATE FUNDS 2018

Siembra Latinos Fund

- Awarded first grants: \$20,000 to 7 nonprofits
- Hosted first community event
- Over \$75,000 raised/pledged

Northern Monterey County Foundation

- Granted \$35,500 (\$59,500 since 2017)
- \$351,000 raised/pledged through 2018

Southern Monterey County Foundation

- Granted \$21,000 (\$93,000 since 2014)
- \$272,000 raised/pledged through 2018

Big Sur Affiliate Fund Exploratory Meeting



COMMUNICATIONS 2018

- Strategic Plan Goal:
Educate the Public About Philanthropy
- Strategic marketing plan to build the brand and reach key audiences
 - Donors
 - Potential Donors
 - Nonprofits
 - Professional Advisors
- Reach people through multiple channels:
print, online, social and radio



COMMUNICATIONS 2018- PRINT

- Redesigned Newsletter
- Legacy Newsletter
- Annual Report
- New & Updated Marketing Materials
- Family Philanthropy
- Philanthropic Vision
- Donor Welcome Kits

Philanthropy Celebrated Panettas Honored with 2018 Distinguished Trustee Award

The annual Celebration of Philanthropy thanks those who support and partner with the Community Foundation for Monterey County (CFMC) to invest in healthy, safe, vibrant communities. On October 24 more than 300 donors, fund holders and friends gathered to take part.



From left: Board Chair Kim Peterson, Leon and Sylvia Panetta, President CSD Dan Sabado enjoy the Celebration of Philanthropy.



From left: Board Chair Kim Peterson, Leon and Sylvia Panetta, President CSD Dan Sabado enjoy the Celebration of Philanthropy.

The highlight of the evening was the presentation of the 2018 Distinguished Trustee Award to Secretary Leon Panetta and Sylvia Panetta. The award honors those who have demonstrated philanthropic leadership in Monterey County.

Together the Panettas have made an incredible impact on the Central Coast. Though they have never lost their sense of place and commitment to Monterey County.

"The Panettas are champions of civic engagement, and outstanding supporters of nonprofits advancing literacy, healthcare, public education and youth development," noted Kim Peterson, 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."

The Panettas co-founded The Panetta Institute for Public Policy in 1997, a nonpartisan, nonprofit think center to inspire people to lives of public service and create opportunities for education and debate. One of Leon Panetta's proudest accomplishments is the establishment of the Monterey Bay National Marine Sanctuary. Sylvia Panetta was key in launching the Monterey County Roads Consortium in 1997.

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

As award recipients, the Panettas designated a \$10,000 grant from the CFMC to the Panetta Institute for Public Policy. Long-time friend Mary Ostrade noted, "Sylvia and Leon give new meaning to the phrase: 'Giving Back.'" Read more at www.cfmc.org/Panettas.



Donor Advised Funds

Strategies for Tax-Wise Giving

The CFMC can help you give to causes you care about while gaining maximum tax benefit.

Donor Advised Funds (DAFs) This is a great way to claim a tax deduction now for supporting your favorite charities in the future. DAFs can be created quickly and easily with a gift of \$5,000 or more. And, with a gift of appreciated stock or mutual funds, you avoid paying capital gains tax on the sale of the stock and receive an immediate charitable income tax deduction for the full value of the asset.

continued on page 5

OPPORTUNITY



IMPACT

COMMUNICATIONS 2018 – ADS

- Ad campaign and content featured “Faces of Philanthropy”
- Expanded ads to Salinas Valley, included more diversity



VALUES

“Our parents passed their values on to us. We give to causes and communities they cared about in the Salinas Valley as a way to honor their memory.”

— Brother and Sister Trinidad and Patricia Gomez, Trinidad and Lupe Gomez Family Fund

Trinidad and Patricia Gomez

Here for Good
Community Foundation
for Monterey County 831.375.9712 | www.cfmco.org | f t in

Develop your philanthropic vision. We can help.
Donor Advised Funds • Scholarships • Legacy Planning (CGAs, CRTs) & More



OPPORTUNITY

“We are about changing employees’ lives by giving them an opportunity. My hopes are that they remember this investment, work hard, and give back someday.”

— Raymond Costa, Raymond H. Costa Family Scholarship Fund of the Community Foundation for Monterey County

Greg Costa (l) and Ray Costa (r) present scholarship to Gabriela Maldonado

Read his story at www.cfmco.org/RaymondCosta

Design your philanthropic vision. We can help.

Here for Good
Community Foundation
for Monterey County 831.375.9712 | www.cfmco.org | f t in

Donor Advised Funds • Scholarships
IRA Rollovers • Charitable Estate Planning (CGAs, CRTs) & More



SUPPORT

“I don’t have the administrative burden of a private foundation and I’m confident my wishes will be carried out in the future.” —CFMO Donor Advised F. Robert Nunes Family Fund, Legacy Society Member

Bob Nunes

Design your philanthropic vision. We can help.

Donor Advised Funds
Charitable Estate Planning (CGAs, CRTs) & More

Here for Good
Community Foundation
for Monterey County 831.375.9712 | www.cfmco.org | f t in

COMMUNICATIONS 2018 SOCIAL MEDIA

- Post regularly to 3 main channels:
 - Facebook
2,750 Followers
 - Twitter
1,429 Followers
 - Linked In
524 Followers



COMMUNICATIONS 2018 - WEBSITE

- Banners - rotate and update
 - Events - what's new / CNE
 - Blogs - cross channel content
 - New for 2019
- ## Updated Planned Giving Section

The screenshot shows a website banner for the 14th Annual Womens Fund Luncheon. The banner features a group photo of people at the event and a circular portrait of Julie Castro Abrams, the keynote speaker. Text on the banner includes: "14th Annual Womens Fund Luncheon Thursday, May 16, 2019", "WITH KEYNOTE SPEAKER JULIE CASTRO ABRAMS Founder and CEO, How Women Lead", and "Support Monterey County women and girls - get your ticket now for our Women's Fund Luncheon! Proceeds benefit scholarships." Below the banner is a navigation menu with links for "Home for Good", "Community Foundation for Monterey County", "About Us", "Donate", "Adopt", "Nonprofits", "Scholarships", and "Impact". Below the banner is a section titled "Healthy, safe, vibrant communities" with a "Read more" button. At the bottom are three buttons: "CREATE A FUND", "ADVISE YOUR CLIENTS", and "APPLY FOR A GRANT".

December 19, 2018

[Fund for Homeless Women Tops \\$1 Million Granted](#)



The Fund for Homeless Women (FWW) of the Community Foundation for Monterey County has topped \$1 million in cumulative grantmaking. Since the fund began awarding grants in 2014, it has distributed 43 grants to 11 different nonprofit organizations totaling \$1,149,110. The \$230,000 awarded in 2018 to seven organizations in December 2018 helped the fund reach the grantmaking milestone. Fund organizers...

[Read more](#)

December 14, 2018

[Grantee Stories: Opportunity & Organizational Development Grants](#)



The Community Foundation for Monterey County (CFMC) is responsive to community needs through its Opportunity and Organizational Development grant programs. Grants to 22 Nonprofits in 2018 Opportunity grants support new and emerging efforts and unexpected time-sensitive needs.

Organizational Development grants can strengthen an entire organization's effectiveness and efficiency. This year, nine organizations received Opportunity grants and 13 received Organizational Development grants...

[Read more](#)

December 3, 2018

[President's Blog: Neighbor Helping Neighbor](#)



By Daniel R. Baldwin, President/CEO Community Foundation for Monterey County As we approach the holiday season and the end of the year, it's natural to start thinking about what has transpired in 2018. People are justifiably nervous about the advent of a "new normal" in which headline divisiveness and rough-edged public discourse rule the day. But there is something about...

[Read more](#)

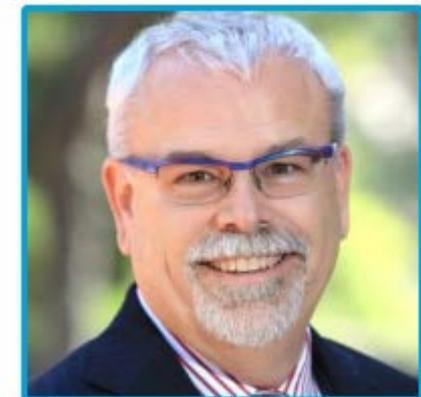
PHILANTHROPIC SERVICES STAFF CHANGES

- Mackenzie Little
Philanthropic Services Associate
- Minnie Elliott
Philanthropic Services Coordinator
- Cristina Dirksen
Communications Coordinator



FINANCE & HR

- Departmental Changes
 - Diane Nonella - promoted to Vice President of Finance & Human Resources
 - Phil Carey - change in responsibilities
 - Roya Afsharzada - Accounting Coordinator, Promoted to Controller
- Community Impact Investing
 - Formed Committee, Investment Policy Statement, Issued RFP, Selected Orgs, reviewed and edited loan documents, signed final agreement & issued 1st 2 placements totaling \$1.75 million
- Ongoing Involvement with 3200 17-Mile Drive
- Clean Audit
- PCI Compliance



ADMINISTRATION & FACILITIES 2018

- Sarah Elias - Administrative Coordinator
- Replaced 30 year-old cooling tower
- Installed 9 energy efficient furnaces and HVAC ducting
- New signage

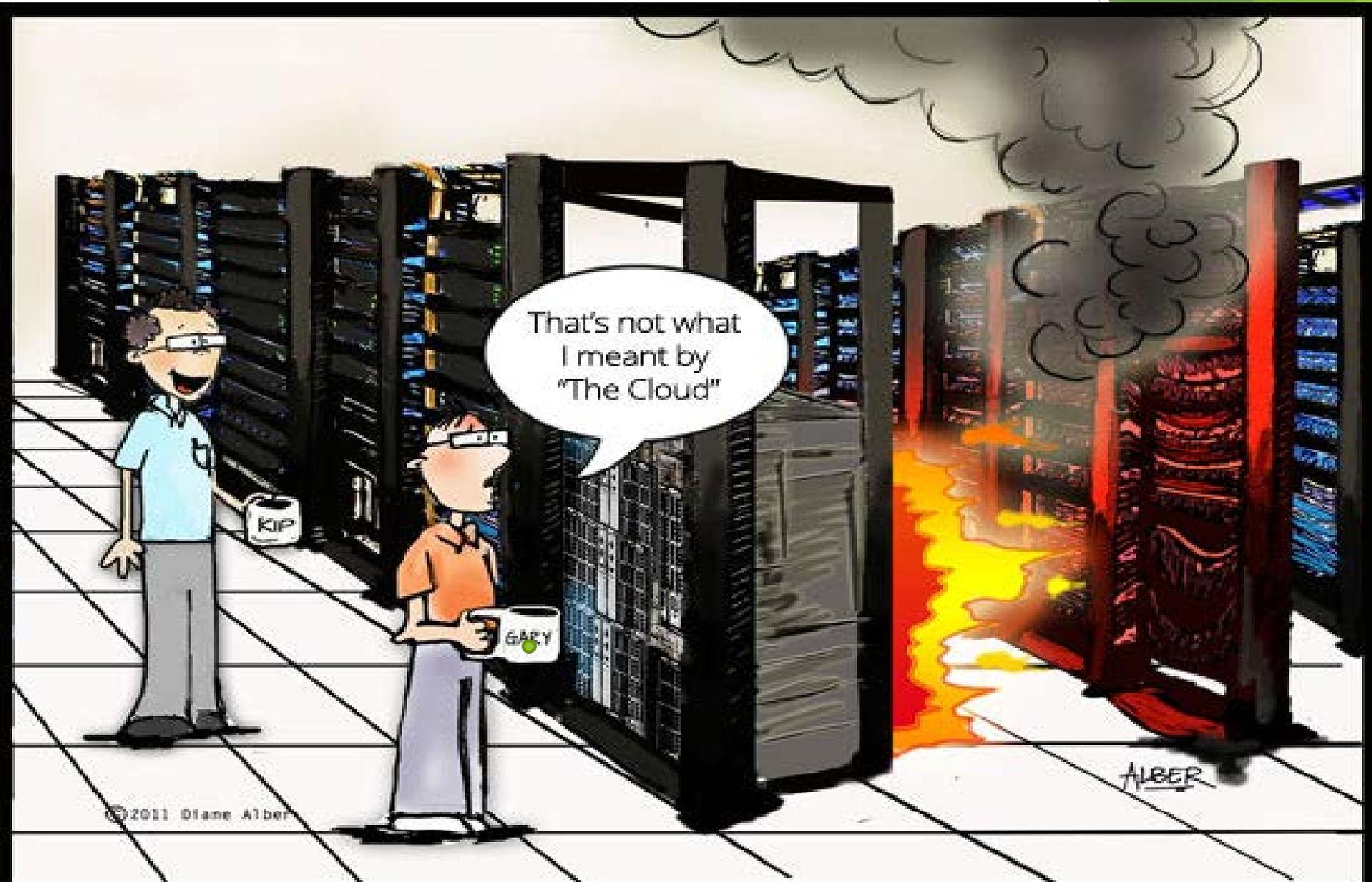


TECHNOLOGY 2018



- Contracted System Operations Manager
Todd Sergot
- Migrated FIMS database and SBS2 server to the cloud hosted environment
- Implemented new credit card security software for PCI compliance
- Researched options for full database migration
- Embraced the Change: CFMC is embracing the changes to the work style of the field. We are researching solutions to keep pace with core operating systems and tools across departments

TECHNOLOGY 2018



BOARD DEVELOPMENT 2018

- Jose Luis Alvarado, Elsa Mendoza Jimenez, Giff Lehman join Board



- Held 7th Annual Past Chairs' Luncheon



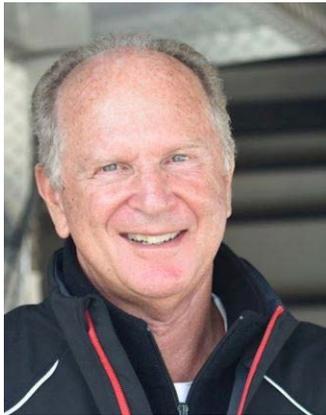
2019 BOARD OFFICERS



Birt Johnson, Jr., Chair



Teri Belli, Vice Chair



Jeff Eikenberry
Secretary



Jan Vanderbilt
Treasurer

COMMUNITY LEADERSHIP 2018

- Affordable Housing - Convened stakeholders to develop shared vision
- Homelessness Leadership Council - Dan
- Bright futures - Dan, Janet
- Impact Monterey County - Kaki
- AFP Board - Christine
- League of CA CFs - Dan,
Public Policy Committee Chair
- CF Public Awareness Initiative
- Dan Steering Committee
- CF National Standards Board - Laurel
- Children's Council - Laurel
- Census Complete Count Committee - Erika



COMMUNITY LEADERSHIP 2018

- **Census 2020:** Convened meeting to ensure full count in partnership with the State of CA. Partnering with League.
- **Impact Investing**
 - California Farmlink
 - Opportunity Fund



COMMUNITY FOUNDATION

CFMC 2018 STAFF - HERE FOR GOOD



CFMC BOARD - HERE FOR GOOD!

Community Foundation
for Monterey County



Questions? Thoughts?

