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.
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

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 regranting project in Salinas. Granted $315,000 to nine organizations
- Formed Endowment Stewardship Committee
CFMC GRANT HISTORY 2010 - 2018

Record Grants
$18,747,114!
2018 GRANTS BY GRANT TYPE

Total: $18,747,114

- Donor Advised $12,778,442*
- Community Impact $2,195,065
- Designated $1,743,241
- Scholarships & Awards $1,336,389
- Special Project $322,500
- Opportunity $99,758
- Affiliate Fund $76,500
- Discretionary $72,700
- Organizational Development $72,519
- Neighborhood Grants $50,000

*Note: Donor Advised Grants Include $4.89 Million from Monterey County Gives!
2018 GRANTS BY GEOGRAPHY

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

Total: $18,747,114
2018 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

Total: $18,747,114
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
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
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

- 2015: $4,740,000
- 2016: $7,600,000
- 2017: $10,660,000
- 2018: $12,270,000
CFMC DAF GRANTS 2015-2018 - # OF GRANTS

Donor Advised Grants Number of Grants

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Grants</th>
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<tr>
<td>2015</td>
<td>698</td>
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<tr>
<td>2016</td>
<td>772</td>
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<td>2017</td>
<td>831</td>
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<tr>
<td>2018</td>
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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)
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
COMMUNICATIONS 2018 - ADS

- Ad campaign and content featured “Faces of Philanthropy”
- Expanded ads to Salinas Valley, included more diversity
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
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
ADMNISTRATION & FACILITIES 2018

- Sarah Elias - Administrative Coordinator
- Replaced 30 year-old cooling tower
- Installed 9 energy efficient furnaces and HVAC ducting
- New signage
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
That’s not what I meant by "The Cloud"
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

Jeff Eikenberry
Secretary

Teri Belli, Vice Chair

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
CFMC BOARD - HERE FOR GOOD!
Questions? Thoughts?