



Here for Good

Community Foundation
for Monterey County

Community Leadership
CFMC Board Retreat
January 26, 2019

Strategic Plan Pillars



GOAL 3 Community Leadership

Recognize opportunities for facilitation of solutions to community issues.

1. Be aware of emerging circumstances and issues
2. Respond proactively to emergencies, disasters, civic unrest, and other circumstances
3. Grow the CFMC's profile in advocacy when such activity can create a strong environment for the CFMC to prosper, or support initiatives that align with the CFMC's core values
4. Utilize CFMC assets for community impact beyond grantmaking

CFMC

Carrying Water

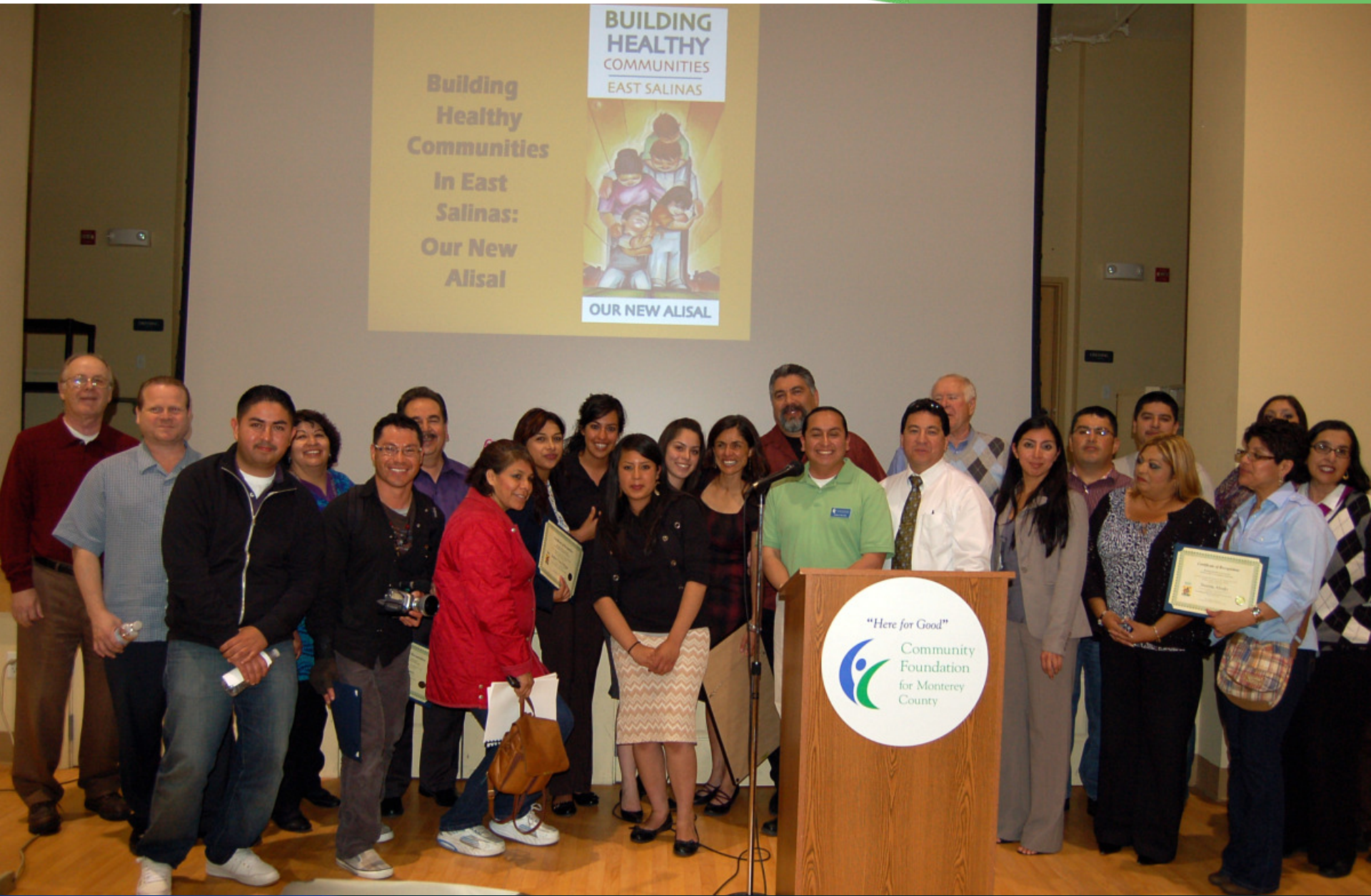
Reactive Community Leadership



Poder Popular



Building Healthy Communities



Communities Advancing the Arts



A group of people are seated at several tables in a meeting room, engaged in discussion. The room features large windows with a view of the outdoors, and a sign on the wall reads "EXIT". The participants are dressed in casual business attire, and the atmosphere appears to be collaborative and professional.

James Irvine Foundation Grant

Irvine Board of Directors Approves More Than \$14.2 Million in Grants on March 23, 2018

The James Irvine Foundation Board of Directors approved 10 grants totaling more than \$14.2 million last week. The grants will support a range of organizations increasing opportunity for the people of California, including those working to expand economic and political opportunity for Californians who are working but struggling with poverty.



Neighborhood Grants Program



CFMC

Filling the Bucket

Pro-active Community Leadership



Literacy Campaign 2006 - 2010



LEAD Institute 2009 - Present



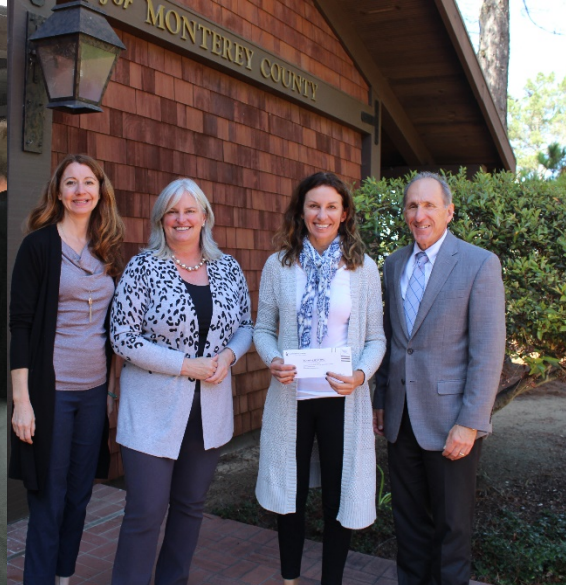
Center for Nonprofit Excellence



Girls' Health in Girls' Hands 2013



Disaster Relief: Soberanes, Big Sur Fire & Relief Funds



Women's Fund Leadership Council



Scholarships



Next Steps 2018 CNE



Affiliate Funds

Northern Monterey County Foundation



Siembra Latinos Fund



Southern Monterey County Foundation



Big Sur??



CFMC

Stirring the Pot

External Community Leadership



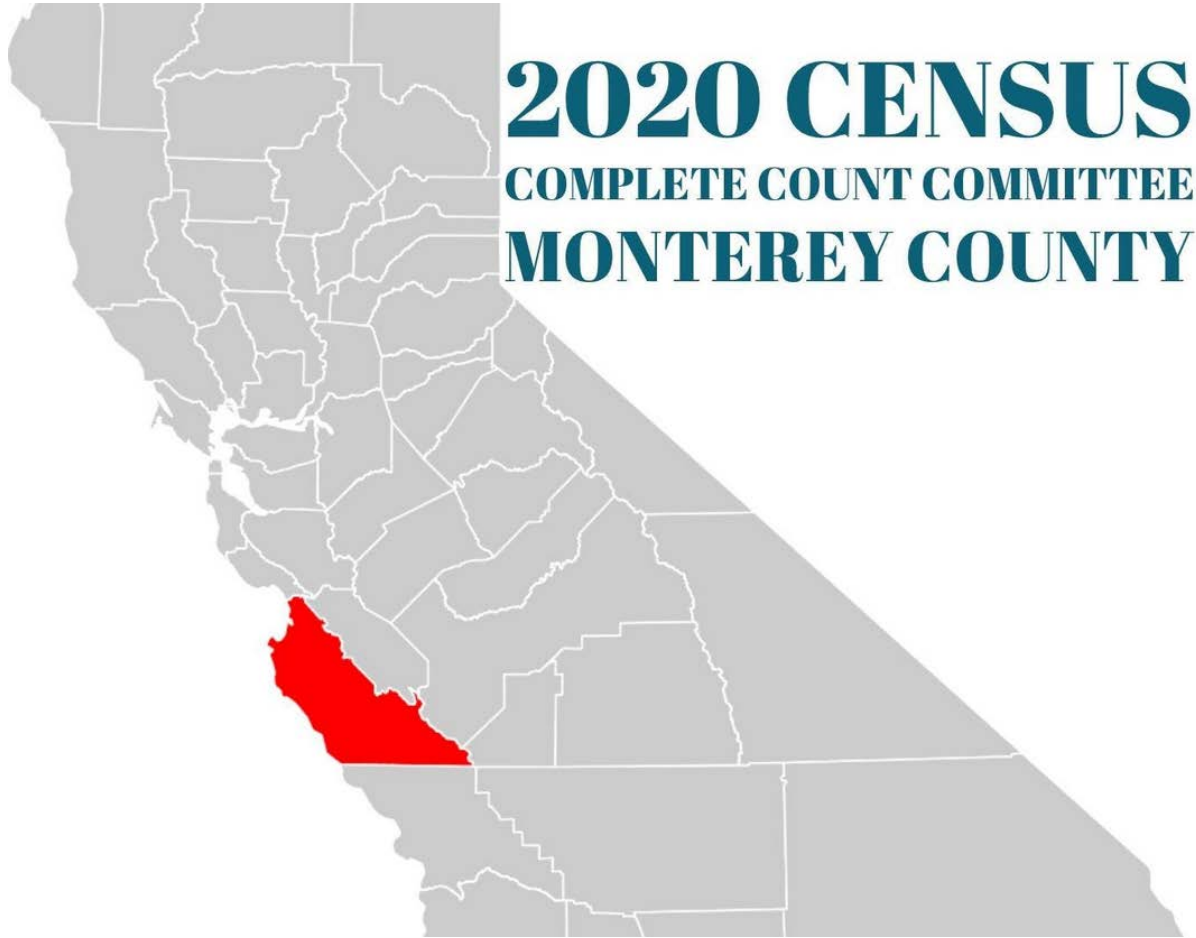
Leading Around Homelessness



Leading Around Affordable Housing



2020 Census – League Priority



Community Impact Investing



Amplifying CFMC's Presence & Values

President's Blog

President's Blog: Census 2020 The Citizenship Question



April 2020 seems like a long way off, but from the standpoint of the 2020 Census, it's just around the corner. The planning and effort that goes into the census is enormous. In any census year there are difficulties in gaining an accurate count, but given that we're living and working in such a polarized environment, in which any activity engaged in by the federal government can generate suspicion, this go 'round is especially challenging. [More](#)

[Learn More](#)



"Not counting someone doesn't mean they're not here. Loss of funding because of undercounting means California and Monterey County won't have resources to implement programs for the full complement of people in need." - Dan Baldwin, President/CEO, Community Foundation for Monterey County

[PRESIDENT'S BLOG](#)



President's Blog: Charlottesville & Our Values

By Dan Baldwin, [Community Foundation for Monterey County](#) President & Chief Executive Officer

I've spent the last couple of weeks trying to wrap my mind around the events in Charlottesville, and the aftermath, which is ongoing. Normally, this space is reserved for addressing topics of direct relevance to our work at the CFMC, so the question becomes how marchers in Virginia (and now elsewhere) connect to philanthropy and grantmaking on the Central Coast?

CFPAI Steering Committee (DAF Defender)

Donor-Advised Funds: Creating Impact

October 17, 2018

By Daniel R. Baldwin

President/CEO Community Foundation for Monterey County



Daniel R. Baldwin

For the past several months, Donor Advised Funds (DAFs) have been the s
And by association community foundations have been drawn into the disc

Questions about DAFs have been raised in some quarters for many years,
providers such as Fidelity and Schwab (and many more) started providing l
their business. This led to an incredible increase in the number of DAFs an

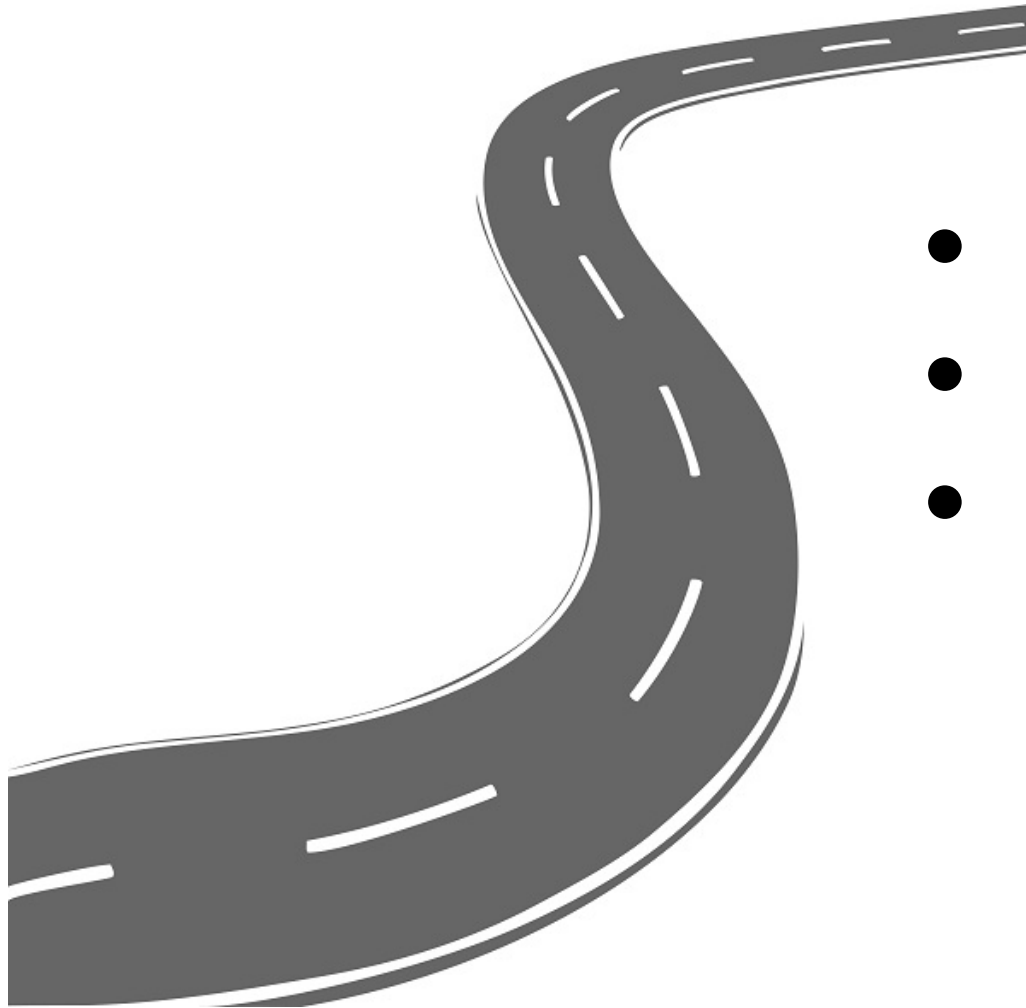
Donor Advised Funds Explained

DAFs are funds into which gifts are made and the donor (the donor advisor)
grants to nonprofits.

Advocacy in Sacramento



The Rules of the Road for Nonprofits



- Lobbying
- Advocacy
- Self - Defense

Rules of 501(c)3 Nonprofit Lobbying

501(c)(3) nonprofit organizations can play an important role in influencing policy and legislation at the federal, state, and local levels.

- A 501(c)(3) organization is subject to heightened restrictions on lobbying activities.
- A 501(c)(3) organization may engage in some lobbying, but too much lobbying activity risks loss of tax-exempt status.
- Lobbying may not constitute a “substantial part” of the activities of the 501(c)(3) organization.

Organization size and Expenditure limits

>\$1,500,000 but ≤ \$17,000,000

\$225,000 plus 5% of the exempt purpose expenditures over
\$1,500,000

CFMC can spend up to \$300,000

Types of Lobbying

Direct lobbying

Attempts to influence a legislative body through communication with a member or employee of a legislative body, or with a government official who participates in formulating legislation.

Grassroots lobbying

Attempts to influence legislation by attempting to affect the opinion of the public with respect to the legislation and encouraging the audience to take action with respect to the legislation.

Key elements of grassroots lobbying may include:

- Referring to specific legislation;
- Reflecting or stating a point of view on the legislation's merits;
- Encouraging the general public to contact legislators.

Both direct lobbying and grassroots lobbying communications refer to or reflect a view on legislation.

Types of Lobbying

Both **direct lobbying** and **grassroots lobbying** communications refer to or reflect a view on legislation.

A "**covered**" **official** is one who is identified by law as a policy maker or advisor. Under the Lobbying Disclosure Act, this generally includes members of Congress, their staffs, committee staffs, and executive branch officials.

Contact with a covered official in order to affect policy generally constitutes lobbying activity, with certain exceptions.



Permitted Activity

- ✓ Conduct public education and training sessions about participation in the political process
- ✓ Encourage members and non-members to write letters
- ✓ Sponsoring or co-sponsoring a debate during an election season, among ALL candidates
- ✓ Meet with/speak with policymakers about legislation
- ✓ Testify at public hearings
- ✓ Provide research, analysis and commentary
- ✓ Publicly endorse or oppose specific legislation
- ✓ Criticize sitting elected officials (may not attack their personal characteristics or attack them in their status as a candidate)
- ✓ Invite a policymaker to visit
- ✓ Use private "non-earmarked" funds to lobby



Not Permitted

- X Raise funds for candidates
- X Make campaign contributions, either cash or in kind
- X Publicly support or oppose candidates
- X Use federal funds to lobby (some exceptions apply)
- X Post partisan political messages on Facebook, Twitter, Tumblr, or other social media sites
- X Connect organization's criticism of public official to voting in an election
- X During an election, compare organization's issue position with that of a candidate



Advocacy

Self Defense

- Land Trust Bill



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[Donors](#)

[Advisors](#)



By [Dan Baldwin](#), [Community Foundation for Monterey County](#) President/CEO

There's talk of doing away with the [Johnson Amendment](#), a law that prohibits nonprofits, including churches, from endorsing political candidates.

Divides Church and State, Clamps Partisan Endorsements

Ways We Can Proceed

★ Create a CFMC
Advocacy Policy

★ Facilitate the
HEAP Leadership Council

★ Chair the LCCF's
public policy committee

★ Support initiatives
that align with the
CFMC's core values



Questions?

