



Giving by Design

What are your interests, values and causes you care about? How do you share them with your family and the world? The Community Foundation for Monterey County (CFMC) helps donors develop their unique vision, and customize a giving plan that works for them.

Whether it's meeting an immediate need such as giving to natural disasters like California wildfires, creating a donor advised fund to streamline giving or donating a piece of real estate to leave a charitable legacy, the CFMC can help clarify solutions to focus and simplify giving.

“We are retired teachers with a modest estate, yet we can still take part in doing good in this world.” —Barbara Brooks

Transforming Real Estate into Income and Giving

Did you know that you can donate real estate or other complex assets to the CFMC to benefit your favorite causes? The CFMC has handled real estate gifts from Orange County to Hawaii.

Recently Steve and Barbara Brooks partnered with the CFMC to donate their Carmel rental property to create a Charitable Remainder Trust (CRT).

“The Brooks were delighted to be able to increase their income and use their property for a charitable purpose that was very



(l to r) Christine Dawson with Steve Brooks, Sarah Elias and Barbara Brooks finalize the Brooks' Charitable Remainder Trust

meaningful to them,” said Christine Dawson, CFMC Vice President of Philanthropic Services. The CRT will provide income to the Brooks during their lifetimes. Upon their passing, the remainder will create a charitable fund benefiting their favorite causes. Read their story at cfmco.org/Brooks.

Designing Your Philanthropic Vision

Senior Philanthropic Services Officer Brian Thayer and Philanthropic Services Officer Mackenzie Little recently became 21/64 Certified Advisors, learning the art of facilitating multi-generation family philanthropy meetings. Brian and Mackenzie engage donors in important conversations about values and philanthropy, using helpful tools to increase personal and generational awareness. These were put to use in a recent Family Philanthropy Workshop for fund holders (See page 7).

Philanthropy Celebrated: Judge Villarreal Honored

Philanthropy starts with one person's desire to help another. At the annual Celebration of Philanthropy that spirit was evident as Dan Baldwin, CFMC President/CEO, spoke about the record grants made possible by unprecedented generosity.

“Grants come from assets. Assets are gifts and gifts come from people. So grants are people helping people,” he told more than 250 friends and supporters in attendance.

Continued on page 4



(l to r) President/CEO Dan Baldwin, Honoree Lydia Villarreal and CFMC Board Chair Birt Johnson, Jr.

President's Message

It's our favorite time of year.

The CFMC is in its busy season.

We recently held the Celebration of Philanthropy, at which we honored Judge Lydia Villarreal with the Distinguished Trustee award. We had a wonderful evening. Monterey County Gives! is in full swing. In 2018 Gives! raised and granted a record \$5.4 million from 4,500 donations. Gives! has become a vital part of year-end gift strategies for many nonprofits. We're very proud to be partnering with the Monterey County Weekly and the Monterey Peninsula Foundation on Gives! None of us ever imagined it would grow to such proportions and become such an important part of Monterey County's philanthropic landscape.



At the same time our Philanthropic Services staff has been busy helping donor advisors with their grantmaking, assisting with fund additions and starting new funds.

This year has seen considerable growth in gifts of real estate, especially into Charitable Remainder Trusts. Whether rental property they're tired of managing or primary residences, CRTs allow for these properties to provide headache-free income for the donors, and later create charitable funds benefiting causes or nonprofits important to the donor.

Our involvement with the 2020 Census is growing. Monterey County



CFMC President/CEO Dan Baldwin speaks about philanthropy as a force for good at Celebration of Philanthropy

“None of us ever imagined Gives! would grow to such proportions and become such an important part of Monterey County's philanthropic landscape.”

- Dan Baldwin, President/CEO, Community Foundation for Monterey County

has been identified as a “hard-to-count” region, so it is vital that we support the nonprofits who are educating vulnerable communities in the importance of participating in the Census. Many people are afraid to input their data into a federal program, even if it is done anonymously. For each resident not counted, our community will lose \$20,000 over the next ten years.

The Fall grant cycle for Community Impact grants is well underway. Applications have been processed and sent to committee members for review and scoring. Soon folks will want to start funds or finish their charitable estate planning by year-end. Our donor advisors will be busy making their own year-end grants. In other words, it's our favorite time of year.

Leverage Your Year-End Giving through MCGives!

Monterey County Gives! began November 7 and runs through December 31. You can leverage your year-end giving by supporting up to 163 participating nonprofits, who will each receive a partial match. You can donate stock or make a contribution using your IRA Qualified Charitable Distribution if you are 70 ½ or older. Call CFMC Senior Philanthropic Officer Brian Thayer at 831.375-9712 x144 for details. Visit mcgives.com to donate.

MCGIVES!



More than 163 nonprofits are participating in Monterey County Gives! this year

Monterey County Gives! is a partnership between the Monterey County Weekly, the Community Foundation for Monterey County and the Monterey Peninsula Foundation. Thanks to Neumeier Poma Investment Counsel, the David and Lucile Packard Foundation, Cannery Row Company and Colburn and Alana Jones Foundation of the CFMC for their generous support.

Honoring a Legacy:

John S. Myszak Scholarship for Future Teachers

Teacher John Myszak went the extra mile to instill in young people a love of learning and prepare them for success. "He had a way of relating to kids, making them feel valued. He understood they needed to know someone cared, that they weren't alone," said his daughter, Stephanie Hulsey.

The cancer that took John's life in 2003 has not dampened his influence. His wife Martha "Marti" Myszak established the John S. Myszak Scholarship for Future Teachers in his memory 15 years ago. Former students and parents still approach Stephanie and Marti with stories of the difference he made in their lives.

The family brought the scholarship to the CFMC in 2018 after learning about the CFMC's vast network and support of scholarship services. The fund continues John's commitment to future teachers by helping defer costs of college and credentialing requirements.

"I was always taught to give back. No matter how much, it's important to give back," said Marti, an active community volunteer and Seaside resident, who met John at an Arthur Murray dance studio, when he asked her to be his dance partner.

"We can't imagine anything greater for him than to continue his legacy of educating kids, and you do that by having good, committed teachers," she continued.

"Marti and my dad led and taught by example. They provided enormous leadership," said Stephanie. "With the Community



Marti Myszak and her daughter Stephanie Hulsey honor the late John Myszak with a scholarship fund in his name

Foundation, we knew we were partnering with an organization with a wonderful reputation, engaged in our community, able to connect us with people who shared John's passion," said Marti.

About CFMC Scholarships



Scholarship funds are established by individuals, families and businesses who want to support local college students in achieving their goals.

The CFMC awarded \$1.4 million through more than 50 named scholarships funds in 2019. Its free online portal matches students with additional scholarships established by other CFMC donors with just one application.

"The CFMC has become a one-stop shop for local students seeking scholarships to attend the college of their choice," said Christine Dawson, CFMC Vice President of Philanthropic Services. For more information, visit cfmco.org/Scholarships.

New Funds Created*

The CFMC manages more than 500 charitable funds. Visit cfmco.org/WaystoGive or call 831.375.9712 to learn more.

Agency/Stewardship

Carmel Valley Angel Project
Stewardship Fund
Kinship Center Stewardship Fund

Designated Fund

MBD Fund
Jack and Donna Hardy Fund
Anne Thorp Memorial Fund

Donor Advised

Zekai and Carolyn Akcan Fund
Antle Family Fund
Colleagues of the Arts Endowment Fund
Anne R. Fitzpatrick Foundation Fund

Franklin Legacy Fund
James and Susan Lansbury Fund
Live and Give Fund
Clint and Karen Miller Charitable Fund
Packer Family Foundation
John and Annette Romans Family Fund
Cynthia Snorf Fund
Thau Family Fund

Scholarship

CASA of Monterey County Scholarship Fund
The Club at Pasadera Scholarship Fund
Ipson-Tully CAL Memorial Scholarship Fund
John S. Myszak Scholarship for Future Teachers Fund
World Affairs Council of the Monterey Bay Area Scholarship Fund

Special Purpose Fund

Census 2020



Michael and Gloria Ipson, Ipson-Tully CAL Memorial Scholarship Fund

The Legacy Society

was created to honor those who included the CFMC in their estate plans.

New Legacy Society Members:

John & Gail Delorey
Jason A. Donovan
Dr. William Donovan
Holly & Jeff Haynes
Barbara Paul & Tom LaFaille
Laura Sinks

*Since March 2019

About the CFMC – Did You Know?

1

You don't have to be wealthy to partner with the CFMC.

The CFMC seeks to make philanthropy accessible to everyone. Donors can make gifts of all sizes to any fund. A donor advised fund can be created with a gift of \$5,000. You can also donate in any amount through the annual Monterey County Gives! campaign that benefits more than 160 nonprofits.

2

You can grant anywhere.

Though the majority of grants (90%) are to nonprofits serving Monterey County, donor advised fund holders can recommend grants to any qualified 501(c)3 nonprofit in any state, and even internationally. The CFMC philanthropic services team conducts due diligence on grantees and can partner with other community foundations throughout the country.

3

Funds can be endowed or non-endowed.

Donors can choose whether their fund is non-endowed (able to grant the full amount each year) or endowed (the principal is invested and the fund grants a percentage in perpetuity). Almost all new donor advised funds are non-endowed.

4

Grantmaking is our top priority.

Grantmaking creates impact. Impact inspires giving. Giving creates more grantmaking. We inspire philanthropy to grow grantmaking. This strengthens our communities.

5

We partner with our donors.

The CFMC works with our donor advisors to maximize the effectiveness of their giving. We share grant opportunities for co-investment and host donor education events throughout the year.

6

We can assist nonprofits with complex gifts.

In some cases, nonprofits don't wish to accept complex assets. The CFMC can accept gifts of complex assets. We can establish vehicles such as Charitable Gift Annuities or Charitable Remainder Trusts to benefit specific nonprofit(s) or fields of interest that donors select.

7

Nonprofits can create funds to take advantage of the CFMC's investment expertise.

More than 70 nonprofits have created funds to take advantage of the CFMC's investment expertise. Funds are invested as part of the CFMC's \$220 million portfolio. Agencies benefit from low fees, investment diversification and reduced administrative burden. Agencies with stewardship funds can retrieve assets any time with a vote of their board of directors.

8

We strengthen nonprofits beyond grantmaking.

The Center for Nonprofit Excellence of the CFMC provides consulting, networking, professional development and resources to help nonprofits fulfill their mission.

9

We are not a county agency.

Though the CFMC has "Monterey County" in its name, it is an independent 501(c)3 nonprofit. We are one of nearly 800 community foundations nationwide.

10

We are "Here for Good."

Our funds are established by individuals, families and businesses who partner with us in their lifetime or through their estates to benefit a wide variety of causes. The CFMC is also a community leader engaging around affordable housing, homelessness and other important issues to help improve the quality of life in Monterey County.

Please visit cfmco.org/DidYouKnow to learn more or call 831.375.9712.



2019 Distinguished Trustee Recipient Lydia Villarreal receives a standing ovation

Philanthropy Celebrated *(continued from page 1)*

Each year the CFMC presents the Distinguished Trustee Award to an individual or couple who has demonstrated philanthropic leadership in our region. The award, now in its 30th year, was presented to Judge Lydia Villarreal at the Celebration of Philanthropy. The 2019 reception took place at Corral de Tierra Country Club in Salinas.

Judge Villarreal has been a champion for farmworkers' rights and an outstanding supporter of nonprofits advancing literacy, healthcare, public education and youth development.

Read more at cfmco.org/Villarreal.

“It's important that we wake up and do the right thing. Treat people with respect and do your best for everybody every day.”

– Lydia Villarreal, 2019 Distinguished Trustee Recipient

Census 2020 – We All Count

The CFMC hosted a donor education event in August to talk about the economic and social service toll if the census count is not reflective of everyone living in Monterey County. For each person not counted in the 2020 Census, Monterey County will lose more than \$2,000 per year in federal aid, or \$20,000 per person over 10 years.

“Loss of funding means Monterey County won’t have resources to implement programs for the full complement of people in need,” said Dan Baldwin, CFMC President/CEO. “This is not a political issue. The issue is being counted, one and all, and making sure Monterey County has the resources it needs to serve its residents.”

“Not counting someone doesn’t mean they’re not here.”

– Dan Baldwin, CFMC President/CEO

Through its Census 2020 Fund, the CFMC has allocated \$185,000 to nine local nonprofit organizations doing grassroots work to encourage Census participation from hard-to-count communities. The initial round of funding was made possible by Sunlight Giving and the Siembra Latinos Fund of the CFMC. Another \$240,000 from the State of California will be granted in November and



Census 2020 Briefing
August 28, 2019



Linda Shak of Sunlight Giving, CFMC Program Officer Erika Matadamas and Rosemary Soto at a donor briefing

\$200,000 from additional funders for more than \$500,000 to support agencies’ work on Census outreach. The CFMC’s Center for Nonprofit Excellence has also held trainings to help nonprofits prepare for the count.

The 2020 Census has vital implications for Monterey County residents. Monterey County has one of the highest hard-to-count populations in California, with 35% or 151,262 people living in hard-to-count areas. For more information visit cfmco.org/Census2020.

Women’s Fund Focuses on Empowerment and Leadership

The vision of the Women’s Fund is to help change lives for local women and girls. Nearly 600 women and men gathered at the annual luncheon in May at the Hyatt Regency to do just that. The luncheon has become one of the largest fundraisers for women and girls in Monterey County.

“We want to support local women and girls in leadership, policy and advocacy to address gaps in economic security and safety. This not only impacts their families but will also improve the quality of life for our entire community,” said Christine Dawson, CFMC Vice President of Philanthropic Services.

Keynote speaker Julie Castro Abrams, Founder/CEO of How Women Lead, spoke about the need for women to be fierce advocates for each another, helping and connecting and reinforcing one another’s voices.

The program, emceed by KSBW Action News 8 anchor Erin Clark, included a video “Creating Pathways,” about the work the Women’s Fund is doing to grow women leaders, invest in scholarships and educate about human trafficking through local nonprofit, Rising International. Learn more and view the video at: cfmco.org/WomensFund.

The Women’s Fund is part of a national movement of foundations working to invest in women and girls. Since 2003, the Women’s Fund has awarded more than \$2.1 million in grants.



Women’s Fund leaders, speaker and supporters gathered at the 2019 Women’s Fund luncheon to empower women and girls

“As I consider the diversity of assets in this room, I am in awe—we have champions for community good, we have mothers and grandmothers, we have brothers and uncles, we have leaders in their field, we have survivors who are now advocates, and we have people in this room who come from great wealth, and we have people who come from great poverty,” said Maija West, CFMC Board member and Women’s Fund Leadership Council Chair.

“We are all equal partners in the healing power of philanthropy.”

– Maija West, CFMC Board member, Women’s Fund Leadership Council Chair

CNE: Supporting the Small but Mighty

Between 50% - 75% of nonprofit organizations have budgets under \$100,000 and fewer than two staff members. Many are all volunteer. Small, grassroots organizations are often deeply embedded in their communities and strongly committed to community improvement. Yet, most capacity building efforts assume levels of organizational infrastructure not present in these organizations.

A New Approach

Over the past 12 years, the CFMC's Center for Nonprofit Excellence has developed an approach to support these smaller organizations that demonstrates respect and understanding for their unique circumstances. This approach includes multi-year general operating support, capacity building goals set by the nonprofits, training and peer learning, and organizational coach/mentors.

Coach/Mentors

The coach/mentor is an experienced consultant with a deep understanding of the community and the ability to support these organizations based on their present organizational development, leadership structure and dreams. The coach/mentor assists them to:

- assess organizational development needs and strengths
- develop multiyear plans to strengthen the organization
- connect to resources such as information, training, peers and consultants
- resolve challenges and move forward by acting as a sounding board
- stay focused on their capacity building goals while also delivering their programs.



Coach/mentors Judy Sulsona and Elsa Quezada with Lori Tuttle and Emily Burton of Hope, Horses & Kids, Salinas

“ The mentorship, training, and peer exchanges offered the support and encouragement we needed to strengthen our core capacities and advance our social justice mission. ”

— Catherine Crockett, Monterey Peace and Justice Center

Building Resources

The coach/mentors' wisdom, humility and commitment made this approach successful in five completed projects. Two years ago, the Center for Nonprofit Excellence recognized the need to develop more coach/mentors. Two individuals were trained, worked closely with existing coach/mentors and are now fulfilling this role in a new project. CNE Director, Kaki Rusmore, recently presented a workshop on this topic at the 2019 Alliance for Nonprofit Management Conference.

CNE also developed an online resource tool for those interested in becoming or supporting coach/mentors, available at cfmco.org/NonprofitMentoring.



**center for
nonprofit excellence**
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Pro Bono Consulting from Stanford ACT



Stanford ACT consultants Barbara Bishop and Alex Lilley work with Kristen Fletcher and Melissa Wolf of UnChained.

Stanford ACT brings together business school alumni with a wide array of private-sector expertise to work pro bono with local nonprofit organizations on projects related to financial assessment, strategic alignment, board development and more. Since 2005, the team has partnered with the Center for Nonprofit Excellence to serve over 60 groups to help them better serve their local communities. Projects run spring through fall 2020.

Nonprofits seeking management and business consulting may apply to work with the Stanford Alumni Consulting Team (ACT) by January 31, 2020. Learn more: cfmco.org/StanfordACT.

Family Philanthropy Workshop Held

The donor education series “Growing Your Giving” is a value-added benefit of partnering with the CFMC in their philanthropy.

In a November workshop, Susie Franklin, fundholder and principal behind the Franklin Legacy Fund, helped donors explore methods of including family in philanthropy as a shared value.

“Each generation has things they care about, this gives them power.” – Susie Franklin

“It’s always a privilege to give. It brings busy families together and creates a bond between younger generations we might not otherwise easily be able to connect with,” Franklin said. “It’s brought our family together in a wonderful way.”

Brian Thayer, Senior Philanthropic Services Officer and Mackenzie Little, Philanthropic Services Officer, helped participants understand assumptions around family, wealth and philanthropy thanks to their recent 21/64 training. They shared ways to identify values, messages around money and conveying giving as a family value to children and grandchildren. These tools are available to all CFMC fund holders. Learn more at cfmco.org/FamilyPhilanthropy.



Brian Thayer, Susie Franklin, Christine Dawson and Mackenzie Little shared ideas and resources at a Family Philanthropy Workshop for fund holders

Giving Options

There are many ways to integrate charitable giving into your financial planning. The CFMC can help. Each of these options offer tax advantages and can help you make a meaningful difference. We can help customize a solution that works best for you.

Donor Advised Funds (DAFs)

This is a great way to claim a tax deduction now and support your favorite charities now or in the future. Donor advised funds can be created quickly and easily with a gift of \$5,000 or more. With a gift of appreciated stock or mutual funds, you avoid paying capital gains tax and receive an immediate charitable income tax deduction for the full value of the gift.

Gifts of Real Estate or Appreciated Stock

Both gifts benefit the donor with an income tax deduction and capital gains tax savings and benefit the CFMC or favorite nonprofit with a direct gift.

Charitable Remainder Trusts & Charitable Gift Annuities

Both offer tax deductions and income for life (a portion of which is tax free). The remainder creates a fund to benefit any nonprofit you choose.

IRA Qualified Charitable Distribution (QCD)

If you are 70½ or older, you can transfer up to \$100,000 annually and reduce the taxable balance of the IRA in your estate. You or your spouse can each gift up to \$100,000 from your IRA accounts to the CFMC to benefit your favorite nonprofits. Gifts made from your IRA are not reportable as taxable income and qualify toward your required minimum distribution, which can lower your income and taxes.

Though gifts to donor advised funds are not eligible, you can contribute to designated, scholarship, agency or field of interest funds at the CFMC. An IRA Qualified Charitable Distribution may also be made through Monterey County Gives! to benefit multiple nonprofits with one set of instructions. Please give us a call for detailed instructions. See cfmco.org/YearEndGiving for deadlines and to learn more.



“ You can give to causes you care about while gaining maximum tax benefit. ”

– Christine Dawson, Vice President of Philanthropic Services

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Inside

Giving by Design
Celebrating Philanthropy
Monterey County Gives!
Census 2020
Honoring a Legacy – Scholarship Story



Here for Good

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(l to r) Marty Wolf, Dan Baldwin, Mel Mason and Birt Johnson, Jr.
at the Celebration of Philanthropy



Wills and Bequests



Donor Advised Funds



Charitable Remainder Trusts



Charitable Gift Annuities

A new website section offers helpful tools and resources to compare planned giving options.

Inspiring Your Legacy Planned Giving Made Simple

The Community Foundation for Monterey County has a new planned giving section on its website. It is a wealth of information and resources, including gift calculators, bequest language and more for donors and professional advisors looking to support their clients.

Whether you would like to learn more about wills and bequests or establishing life-income gifts such as Charitable Gift Annuities or Charitable Remainder Trusts, the site can help guide you through the many options available.

Visit cfmco.org/PlannedGiving to explore ways to leave your legacy. You'll find stories to inspire you at cfmco.org/LegacyStories.