VISION & MISSION

Healthy, Safe, Vibrant Communities

To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County
2019 TOP 10

10) 17.8% Investment Return*
9) Year of Real Estate
8) Census 2020
7) Affiliate Fund Expansion
6) Monterey County Gives!

*Long-term portfolio. Medium-term 14.2%, ESG 18.4%.
5) Created and Filled Grants and Data Manager Position plus Senior Accountant

4) Approved Investment Policy Statement & Advocacy Guidelines

3) Sale of 3200 17-Mile Drive

2) $31,037,246* Total Gifts

1) Record Grants! $19,234,640* *(preliminary year-end as of 1/16/20)
BUT WAIT!
There’s more…

- Continued Scholarship Growth
- New Carpet!
- 35 new funds started
- Clean audit for the millionth year in a row!
- Record Year-end Assets $288,526,467 (as of 1/16/20)
More than $19.2 million granted

Surpassed $200 million cumulative grantmaking

The James Irvine Foundation regranting program: Convened nine Salinas-based grantees to grow economic opportunity and civic engagement (3-year grants & capacity building to 10 nonprofits)

College Futures Monterey County Awarded final grant from College Futures Foundation and planned implementation with CSUMB
SCHOLARSHIPS 2019

- Awarded 371 scholarships totaling $1,406,500 Million
- Taylor Farms – Awarded $100,000 in new scholarships plus more than $100,000 in renewals
- Women’s Fund – 29 scholarships totaling $75,000
- College Futures Monterey County – 69 scholarships totaling $445,000
Focus on leadership development:
- 18 LEAD Institute graduates and 130+ alumni
- Board, ED roundtables
- Presented Board Connect Reception

Served 159 organizations, 96 people in workshops
BEYOND GRANTMAKING
Center for Nonprofit Excellence

- Completed and evaluated Next Steps for Small Nonprofits
- Published Nonprofit Mentors Handbook
- Partnered with Impact Monterey County, NAMC, & AFP to provide professional development
- Reconfigured Nonprofit Consultant Directory
Growth in real estate transactions, CRTs, CGAs

$5.9 million in 866 DAF grants

DAF Co-Investment $255,909 from 21 funds (2018: $172,000 from 18 funds)

Increased donor engagement through donor education and site visits
PHILANTHROPIC SERVICES 2019

- Expanded affiliate fund work to include Big Sur and Carmel Valley
- Added 26 New Legacy Society members (238 Total)
- Grew Total Expectancies to $197,066,673
PHILANTHROPIC SERVICES 2019
New Fund Breakdown

- Donor Advised: 15
- Scholarship: 7
- Designated: 4
- Stewardship: 3
- Special Purpose: 3
- General Endowment: 2
- Field of Interest: 1

Total = 35
PHILANTHROPIC SERVICES 2019
Monterey County Gives!

- $5.39 Million Raised
- Record Overall Match $528,240 ($509,526 in 2018)
- Record Challenge Grants $1.2MM (23% over $982,528 in 2018)
- Record 4,967 Donors (4,678 in 2018)
Siembra Latinos Fund

- Invested $5,000 in Census, spurred growth of Census 2020 fund
- Guided grantmaking of $45,000 to four organizations working to ensure a fair and accurate count
- Hosted successful Siembra Latinos event in South County
- $23,846 (non-endowed) and $49,786 (endowed)
**Northern Monterey County Foundation**
- Granted $34,000 ($93,500 since 2017)
- $352,000 raised/pledged - 2019

**Southern Monterey County Foundation**
- Celebrated its fifth year
- Granted $27,900 ($121,000 since 2014)
- $354,000 raised/pledged - 2019
Shared donor stories across platforms

Increased diversity “Faces of Philanthropy”

De Guigne Public Relations

New Annual Report format

Social Media – 2,901 Facebook followers increased video & cross-posting

Began work on 75th Anniversary Year
ORGANIZATIONAL EXCELLENCE 2019
Finance/Investment/Stewardship

- Hired Senior Accountant
- Clean Audit
- New Investment Policy Statement
- Sale of 3200 17 Mile Drive (largest contribution with most moving parts)
- Sale of the Brooks and Palmeroo properties
- Added Remote Deposit Capture
Established Staff Diversity, Equity and Inclusion (DEI) Committee.

Led by Laurel Lee Alexander, VP Grants & Programs
Members include representatives from each department

Purpose statement: To advise and support the CFMC to become more diverse, equitable and inclusive.
Organization Excellence 2019
Administration/Technology/Facilities

- 3500 letters scanned and filed, 5000 donor checks copied, 2100 CRJ entries
- Updated IT infrastructure (cabling, Comcast, switches, firewall) for both Monterey and Salinas offices
- New carpet installed
- Trees Trimmed & Tamed
Organizational Excellence 2019

Board of Directors

- Birt Johnson, Jr. becomes 2-year chair
- Jan, Michael, Giff, Loren, Fred, Jose Luis attend Board Basics Training
- Held 8th Annual Past Chairs’ Luncheon
- Kirk Gafill & Joe Pezzini join Board
COMMUNITY LEADERSHIP 2019

- **Affordable Housing** Convened City, County and nonprofit stakeholders to work on shared vision

- **Homelessness** Facilitated HEAP Funding and grantmaking, CEO part of Leadership Council

- **Advocacy** Work around AB1712 Chair of Advocacy Committee for League of California Community Foundations & member Community Foundation Public Awareness (CFPAI) Steering Committee

- **Census 2020** Staff Liaison, Census 2020 Fund, donor and nonprofit education, co-investment, $500,500 allocated in grants.
Feedback? Questions? Comments?