

2019 Year In Review

CFMC BOARD RETREAT
JANUARY 18, 2020



Community Foundation
for Monterey County

75
1945-2020
Here for Good



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%.

2019 TOP 10, cont.

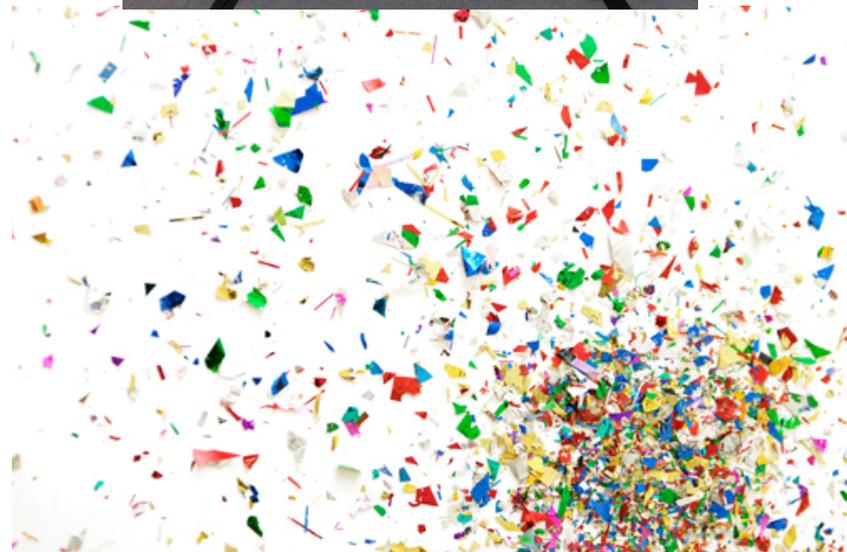
- ✓ 5) Created and Filled Grants and Data Manager Position plus Senior Accountant
- ✓ 4) Approved Investment Policy Statement & Advocacy Guidelines
- ✓ 3) Sale of 3200 17-Mile Drive
- ✓ 2) \$31,037,246* Total Gifts
- ✓ 1) Record Grants!
\$19,234,640*

**(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)



GRANTMAKING 2019

- ▶ 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



Children & Youth
Development



Health & Human
Services



Environment
& Animal
Welfare



Community
Development



Arts, Culture
& Historic
Preservation

SCHOLARSHIPS 2019

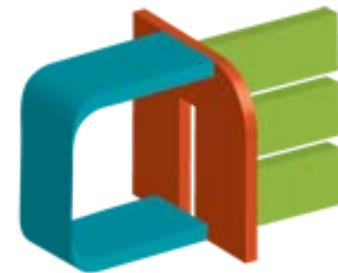
- ▶ Awarded 371 scholarships totaling \$1,406,500 Million
- ▶ Taylor Farms
 - Awarded \$100,000 in new scholarships plus more than \$100,000 in renewals
- ▶ Women's Fund – 29 scholarships totaling \$75,000
- ▶ College Futures Monterey County – 69 scholarships totaling \$445,000



BEYOND GRANTMAKING

Center for Nonprofit Excellence

- ▶ Focus on leadership development:
 - 18 LEAD Institute graduates and 130+ alumni
 - Board, ED roundtables
 - Presented BoardConnect Reception
- ▶ Served 159 organizations, 96 people in workshops



**center for
nonprofit
excellence**

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



**center for
nonprofit
excellence**

PHILANTHROPIC SERVICES 2019

- ▶ 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

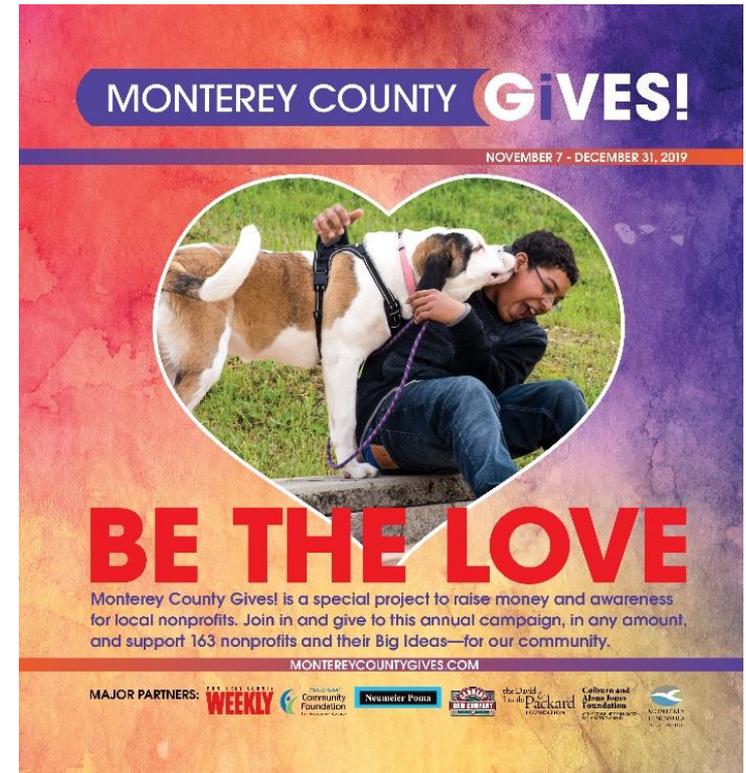
- ▶ Donor Advised: 15
- ▶ Scholarship: 7
- ▶ Designated: 4
- ▶ Stewardship: 3
- ▶ Special Purpose: 3
- ▶ General Endowment: 2
- ▶ Field of Interest: 1

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)



A promotional poster for the Monterey County Gives! campaign. The background is a vibrant, abstract watercolor design in shades of red, orange, and purple. At the top, a dark blue banner contains the text "MONTEREY COUNTY GIVES!" in white, with "GIVES!" in a larger, bold font. Below this, a smaller banner indicates the dates "NOVEMBER 7 - DECEMBER 31, 2019". The central focus is a heart-shaped cutout showing a young boy with glasses and a dark jacket sitting on a stone ledge, affectionately hugging a brown and white dog. Below the heart, the slogan "BE THE LOVE" is written in large, bold, red capital letters. Underneath the slogan, a paragraph of text reads: "Monterey County Gives! is a special project to raise money and awareness for local nonprofits. Join in and give to this annual campaign, in any amount, and support 163 nonprofits and their Big Ideas—for our community." Below this text is the website "MONTEREYCOUNTYGIVES.COM". At the bottom, a section titled "MAJOR PARTNERS:" lists several organizations with their logos: WEEKLY COMMUNITY FOUNDATION, Neuneler Poma, the David and Lucile Packard Foundation, Calbra and Anne Jones Foundation, and the Monterey County Office of Philanthropy.

MONTEREY COUNTY **GIVES!**

NOVEMBER 7 - DECEMBER 31, 2019

BE THE LOVE

Monterey County Gives! is a special project to raise money and awareness for local nonprofits. Join in and give to this annual campaign, in any amount, and support 163 nonprofits and their Big Ideas—for our community.

MONTEREYCOUNTYGIVES.COM

MAJOR PARTNERS: **WEEKLY COMMUNITY FOUNDATION** Neuneler Poma the David and Lucile Packard Foundation Calbra and Anne Jones Foundation the Monterey County Office of Philanthropy

PHILANTHROPIC SERVICES 2019

Siembra Latinos Fund

► 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)



PHILANTHROPIC SERVICES 2019

Affiliate Funds

- ▶ **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



COMMUNICATIONS 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

Faces of Philanthropy – Join Us!



ORGANIZATIONAL EXCELLENCE 2019

Finance/Investment/Stewardship

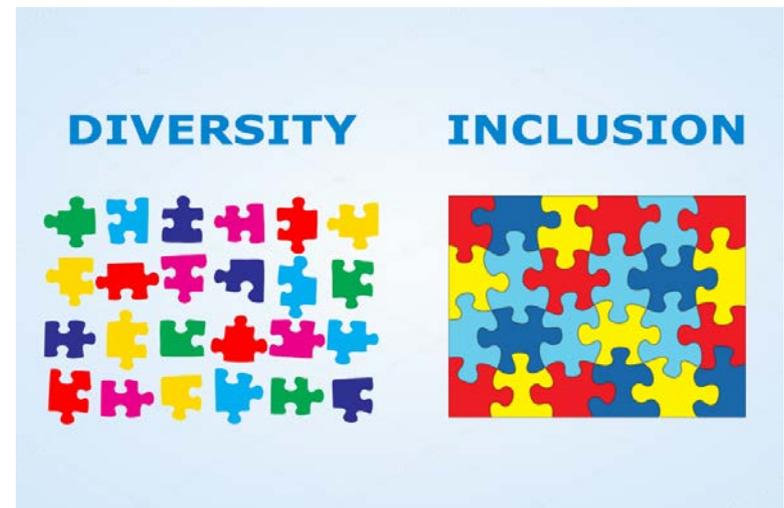
- ▶ Hired Senior Accountant
- ▶ Clean Audit
- ▶ New Investment Policy Statement
- ▶ Sale of 3200 17 Mile Drive
(largest contribution with most moving parts)
- ▶ Sale of the Brooks and Palmeroo properties
- ▶ Added Remote Deposit Capture



ORGANIZATIONAL EXCELLENCE 2019

Diversity, Equity, Inclusion (DEI)

- ▶ 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.*



ORGANIZATIONAL 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

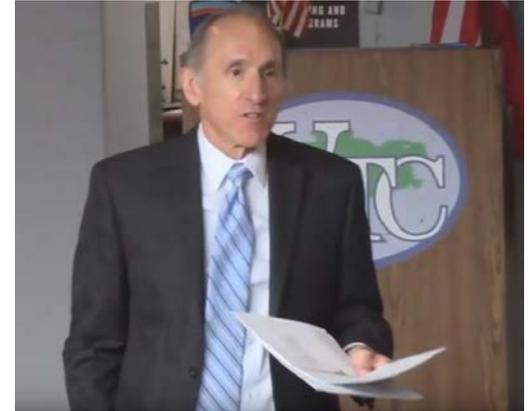


- ▶ Birt Johnson, Jr. becomes 2-year chair
- ▶ Jan, Michael, Giff, Loren, Fred, Jose Luis attend Board Basics Training
- ▶ Held 8th Annual Past Chairs' Luncheon
- ▶ Kirk Gafill & Joe Pezzini join Board



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.



2019 BOARD: *HERE FOR GOOD!*



Feedback? Questions? Comments?

