



## Resource Development Summary

August, 2020

### Current Activity Report

#### Number of Meetings/Contacts

Month	Professional Advisor	Prospects	Current Fund	Presentations		Events		Newsletters - eBlasts
January	5	19	19	4	*See below	11	*See below	3
February	12	22	12	4	*See below	11	*See below	2
March	10	22	13	2	*See Below	11	*See Below	3
April	8	15	12	4	*See below	8	*See below	2
May	5	16	7	9	*See below	8	*see below	4
June	6	12	12	6	*See below	8	*See below	4
July	12	24	9	8	*See below	8	*See below	4
August	5	19	12	6	*See below	4	*See below	4
<b>Total Activity</b>	<b>63</b>	<b>149</b>	<b>96</b>	<b>37</b>		<b>69</b>		<b>26</b>

**January Events:** Weston Call Fund for Big Sur, Community Fund for Carmel Valley, Northern Monterey County Foundation, Board Retreat, Southern Monterey County Foundation, TIAA Kaspick Bequest Reporting Tool Webinar, Community Fund for Carmel Valley Meeting, Siembra Latinos Meeting, Junior Achievement Monterey Bay Business Hall of Fame Lunch, Noteware Retreat, HRI- Restorative Justice, MLK Day March, LCCF Public Policy, Montage Foundation, DAF Presidents Call, Bright Futures, Legacy Planning, Churuch in the Forest, AFP Board Meeting, Leadership Council

**February Events:** CFMC Legacy Lunch, Community Fund Carmel Valley meeting, Weston Call Fund for Big Sur meeting, SMCF event planning meeting, NMCF meeting, MC Gives Check Ceremony, Census Convening, AFP Site-Visit, IMPOWER, Montage Luncheon, Hartnell Presidential Task Force, Salinas Valley Regional Economy, Marti and Steve Diamond Foundation, Irvine Foundation, AFP Meet the Funders Presentation

**March Events:** Resource Development Committee Meeting, Community Fund for Carmel Valley Meeting, Southern Monterey County COVID response meeting (Zoom), Bright Futures/ Bright Spot Celebration, Carmel Valley Women's Club Luncheon, Leadership Council, Weekly COVID-19 Call, AFP Board Meeting, LCCF, Driscolls, Regional Prosperity Strategy Meeting, MPCC Board Meeting, Business Roundtable City of Monterey

**April Events:** PG Calc The Pandemic, the CARES Act, and Gift Planning Webinar; Stevenson School Philanthropy Project Presentation; COVID-19 Donor Education Zoom Event; Community Fund for Carmel Valley Zoom Meeting; MBEP's Annual Regional Economic Summit, Weekly COVID Community Call, CEO Lunch/ LCCF, Urban County Standing Committee, Siembra Latinos Fund, Regional Prosperity Strategy Meeting, CFF/ CPI Convening

**May Events:** MEDA Investment, Economic Stimulus, COVID-19: Preparing Community Foundations, LCCF AB 2936, 2020 Census CCC for Monterey County, Business Roundtable 8.0, Monterey Community Network Conversation, Small Business Relief Fund, DAF/Community Foundation Leadership call, County COVID 19 Response effort updates, The Club at Pasadera Fund, LCCF: CEO Only Member Meeting, AFP Board Meeting, Women's Fund Virtual Luncheon, CPI Virtual Convening, CFMC/TIAA Kaspick Relationship Meeting, Virtual Martin and Nancy Dodd Awards, Leadership Council, SVMH Investment Committee

**June Events:** Community Fund for Carmel Valley meeting, Gathering for Women Zoom Event, Akoya Training; Philanthropy Education Event; COVID-19 from Relief to Recovery, Stevenson Philanthropy, 2020Census CCC Monterey County, Sunrise Rotary Presentation, Small Business Relief Fund Meeting, LCCF, Business Roundtable, Local Stimulus Plan, MPLF Next Steps, 75th Anniversary Committee, State of Education, Continium of Care- 10 year plan, CPI Virtual Convening, Community Impact Investment, Leadership Council Meeting (HHAP AND ESG ALLOCATIONS), James Irvine Foundation

**July Events:** Northern Monterey County Foundation grant meeting; Southern Monterey County Foundation meeting; DEI Training; Community Fund for Carmel Valley meeting; Akoya Trainings and Conference; Irvine Foundation, LCCF Weekly Policy Meeting, AB 2936, Coral de Tierra Fund Ctte., AFP Board meeting, CA DAF Group - Update on AB2936, CA Economic Summit Host Committee, Small Business Relief Fund, CPI Convening

**August Events:** Community Fund for Carmel Valley Meeting, Weston Call Fund for Big Sur Meeting, Northern Monterey County Foundation Meeting, DEI Book Club, Women's Fund Leadership Council Meeting, CFMC 75th Anniversary Salinas Rotary, Leadership Council, LCCF, CFPPI, Census

\*On-going: Salinas & Monterey Rotary Clubs

#### Planned Gifts

<b>New Legacy Society Members for the Year:</b>	<b>13</b>
<b>Expectancy Additions Year to Date:</b>	<b>\$ 21,695,182.56</b>
<b>Legacy Society Members to Date:</b>	<b>251</b>
<b>Total Expectancies to Date:</b>	<b>\$ 224,689,726.65</b>

<b>New Funds Created 2020</b>		
<b>Type of Fund</b>	<b>Number of Funds</b>	<b>Establishing Gift</b>
<b>Affiliate Fund</b>		
Weston Call Fund for Big Sur	1	\$ 5,000.00
Community Fund for Carmel Valley	1	\$ 10,000.00
<b>Agency Endowment Fund</b>		
Mayor Joe Gunter Memorial fund for the Vetrans Day Parade	1	\$ -
Communities for Sustainable Monterey County	1	\$ 50,000.00
<b>Agency Stewardship Fund</b>		
Carmel Valley Manor Foundation	1	\$ 12,817,687.00
Early Childhood Equity Stewarship Fund	1	\$ 50,000.00
Hartnell Stewardship fund	1	\$ 200,000.00
<b>Endowed Donor Advised Fund</b>		
Monterey County Tolerance & Acceptance Fund	1	\$ 4,500.00
<b>Program Fund</b>		
<b>Non-Endowed Donor Advised Fund</b>		
Carmel Gives Fund (formerly Tim Allen Cares)	1	\$ 51,780.00
Corral De Tierra Country Club Employee Emergency Assistance Relief Fund	1	\$ 5,000.00
The Club at Pasadera Employee Emergency	1	\$ 2,500.00
Dewey Foundation Fund	1	\$ 5,000.00
Karen Judkins and Steven Wade Fund	1	\$ -
James W. Sullivan and Catherine Brennan Family	1	\$ 9,000.00
Frances Memorial Fund	1	\$ 5,000.00
Mads and Susan Bjerre Charitable Fund	1	\$ 98,179.00
Lawrence and Carleton Mowell Fund	1	\$ 20,967.38
Tom Hopkins Wilderness Fund	1	\$ 5,000.00
<b>Non-Endowed Scholarship</b>		
AGB Scholarship Fund	1	\$ 51,000.00
Vista Verde Labor Scholarship Fund	1	\$ -
<b>Non-Endowed Special Purpose Fund</b>		
Love our Central Coast Feed The Homeless Fund	1	\$ 100,000.00
Monterey Peninsula Small Business Relief Fund	1	\$ 1,000.00
<b>Special Purpose Fund</b>		
Casa de Noche Buena	1	\$ 10,000.00
<b>New Funds Created Total:</b>		
	<b>24</b>	<b>\$ 14,114,066.72</b>
New Recievables/CGA/Bequests/Grants		\$60,542.00
Payment on Previously Recorded Recievable		\$876,174.45
<b>Total Contributions</b>		
<b>Year 2020 - YTD</b>	<b>\$</b>	<b>22,540,767.58</b>
<b>Year 2019 - YTD</b>	<b>\$</b>	<b>21,394,798.98</b>