

*Here for Good*



**Community Foundation**  
for Monterey County

**CFMC BOARD RETREAT**  
**January 22, 2022**  
**Welcome!**



# CFMC BOARD RETREAT

## Saturday, January 22, 2022

|       |                          |
|-------|--------------------------|
| 9:00  | Welcome                  |
|       | Introductions/Icebreaker |
| 9:25  | Year in Review           |
| 9:55  | CEO Goals                |
| 10:10 | Break                    |
| 10:20 | Fund for Monterey County |
| 10:50 | Breakout Session         |
|       | 2022 CFMC Priorities     |
| 11:30 | Breakout Reports         |
| 12:15 | Year in Review Video     |
| 12:20 | Close                    |



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**Community Foundation**  
for Monterey County

**CFMC BOARD RETREAT**  
**January 22, 2022**

**2021 Year in Review**

# 2021 TOP 10



- ✓ 10) Completed work with systems consultant on streamlining gift/grants systems
- ✓ 9) Made first Community Impact Investment loan in support of affordable housing
- ✓ 8) Welcomed Larry, Rene and Jesse to the board
- ✓ 7) Combined DEI staff committee with board work group
- ✓ 6) Awarded \$3 million, 2-year James Irvine Foundation Inclusive Economic Development Grant

# 2021 TOP 10, continued



- ✓ 5) Developed and led the COVID-19 Collaborative
- ✓ 5a) Oversaw the Community Health Worker (VIDA) program
- ✓ 4) Successfully held board retreat, 6 board meetings, 5 exec and dozens of committee meetings – all on Zoom and didn't skip a beat! ...so look forward to when we can meet in person
- ✓ 3) \$9.7 Million Monterey County Gives!
- ✓ 2) Total Gifts \$44,839,183
- ✓ 1) Record Grants! \$36,152,557! (as of 1/5/21)  
Increase of \$9 million over 2020 record of \$27 million

# BUT WAIT! There's more...

- Received recognition from Board of Supes, MC Weekly and CASP for COVID-19 Collaborative
- Celebrated Julie Conrad (16 years, 3 months) and Diane Nonella (22 1/2 years) who retired from the CFMC
- Created Director of Operations position (Maria). Promoted Karina (Grants and Data Specialist), Michael (Community Initiatives Manager), Susie (Director of the CNE), Kim (VP of Finance and Human Resources) and Christine (Senior VP Philanthropic Services)
- Successfully implemented first year of one grant cycle for Community Impact (CI) program
- Held Legacy Society and Past Chair's "Luncheon" on Zoom
- Awarded \$1.5 million in Scholarships
- 9.9% YTD return in long term portfolio (through 11/30/21)
- Clean audit!
- Survived!
- Record Year-end Assets: est. \$385 million (as of 1/21/2021)



*Here for Good*

**Community Foundation**  
for Monterey County

## VISION & MISSION

Healthy, Safe, Vibrant  
Communities

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

# OUR VALUES

We **advance positive change** through grant making, community engagement and collaboration.

We **build a legacy for future generations** through responsible stewardship of the resources entrusted to us.

We **operate with the highest standards** of integrity, ethics and accountability.

We **embrace diversity, equity and inclusion**.

We **commit to fairness and respect** for the dignity of all people.

We are **open and honest** with our philanthropic partners, grantees and the community.

We **strive for excellence** in all that we do.

# CFMC STRATEGIC PLAN

- **Goal One: Community Impact**

Invest in healthy, safe and vibrant communities across Monterey County.

- **Goal Two: Philanthropic Leadership**

Inspire and facilitate philanthropy throughout Monterey County.

- **Goal Three: Community Leadership**

Recognize and act upon opportunities for facilitation of solutions to community issues.

- **Goal Four: Organizational Excellence**

Optimize performance and stewardship for maximum impact.

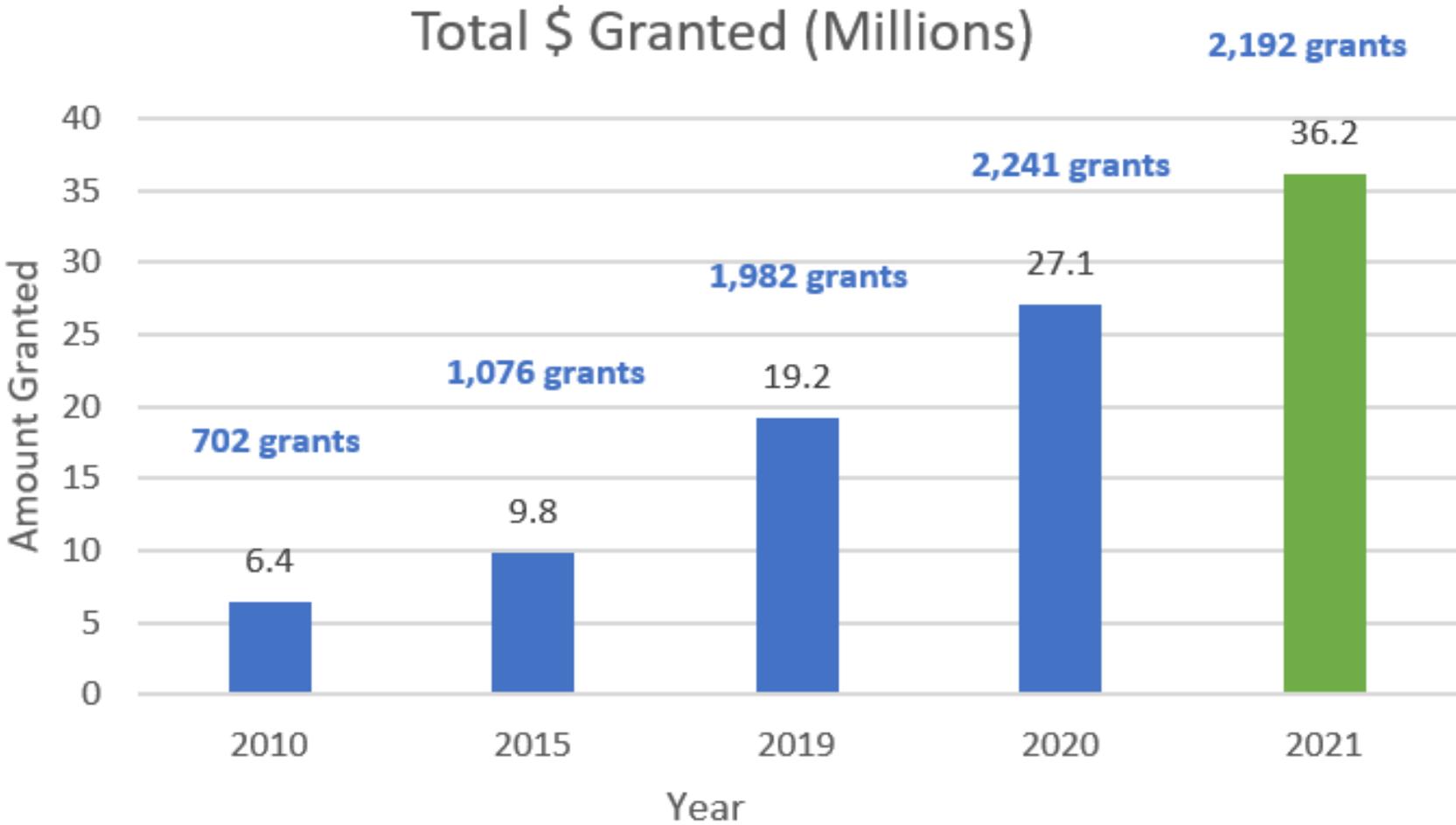


# COMMUNITY IMPACT Grantmaking 2021



- Record \$36 million total granted
- Granted \$4,260,661 via COVID-19 Relief Fund and \$921,358 via Fire Relief grants (2020 and 2021)
- Received \$3.2 million from The James Irvine Foundation to implement the Salinas Inclusive Economic Development Initiative over 2 years
- Streamlined Community Impact, CFMC's largest discretionary grant program

# COMMUNITY IMPACT - GRANTS



# COMMUNITY IMPACT

## Scholarships



- Awarded 389 scholarships totaling \$1.5 million
- College Futures Monterey County: Awarded 71 scholarships totaling \$241,500
- Started 6 new scholarship funds

McDonald's Restaurants of the Salinas Valley would like to congratulate the recipients of the 2021 Raymond H. Costa Family Scholarship

|   |   |  |   |   |  |   |
|---|---|--|---|---|--|---|
| <br>Mohamed Torfifi<br>ASU<br>CA Monterey Bay             | <br>Elizabeth Smith<br>ASU<br>CA Monterey Bay     | <br>Andrea Carrasco<br>UC Merced<br>CA Monterey Bay      | <br>Rosalba Chavez<br>UC San Diego<br>CA Monterey Bay | <br>Sofiane Guzman<br>UC Merced<br>CA Monterey Bay    | <br>Dino Lopez<br>UC Merced<br>CA Monterey Bay         |   |
| <br>Orfan Melis<br>Lopez<br>CA Monterey Bay              | <br>Isai Lopez<br>UC Monterey Bay                | <br>Nash Mirza<br>Harvard<br>CA Monterey Bay            | <br>Erika Calligaris<br>UC Merced<br>CA Monterey Bay | <br>Isaac Perez<br>UC Merced<br>CA Monterey Bay      | <br>Cherik Ramirez<br>UC San Diego<br>CA Monterey Bay | <br>Cristo Rodriguez<br>Harvard<br>CA Monterey Bay |
| <br>Mariana Morales<br>San Jose State<br>CA Monterey Bay | <br>Gabriela Herra<br>Harvard<br>CA Monterey Bay | <br>Francisco Hernandez<br>UC Merced<br>CA Monterey Bay | <br>Rafael Guadalupe<br>UC Merced<br>CA Monterey Bay | <br>Benji Villalobos<br>UC Merced<br>CA Monterey Bay | <br>Dante Vergara<br>UC San Diego<br>CA Monterey Bay  |   |

Not pictured: Everardo Garcia, CA Monterey Bay

The Raymond H. Costa Family Scholarship has awarded \$283,750 in 99 scholarships since 2017.

[www.cfmcc.org/RaymondCosta](https://www.cfmcc.org/RaymondCosta) [communityfoundation.org/Scholarships](https://www.communityfoundation.org/Scholarships)



# COMMUNITY IMPACT

## Center for Nonprofit Excellence



Amid ongoing uncertainty, the CNE found creative ways to offer support in challenging times.

- Welcomed Reid to the team!
- 143 organizations engaged with CNE overall
- Consultations with CNE staff increased 82% over 2020
- Six organizations engaged coaching support around finances from national firm BDO FMA
- 17 nonprofit leaders recruited for 2022 LEAD Institute
- Published four blog posts and COVID Nonprofit survey report



# PHILANTHROPIC LEADERSHIP 2021

- Created 47 New Funds
- Added 9 Legacy Society Members – 260 total
- Created 2 CGAs
- Grew total expectancies to \$233,314,857
- Held virtual Legacy Society "Luncheon" and donor education events and in-person Celebration of Philanthropy
- Grew scholarships and planned Women's Fund reboot
- Created Advisor Solutions PA E-news and hosted PA presentation
- Created Director of Gift Planning position (Andrea)





# PHILANTHROPIC LEADERSHIP

## Affiliate/Special Purpose Funds

### **Northern Monterey County Foundation**

- Granted \$31,500 (\$160,000 since '17)
- \$527,000 raised/pledged through 2021

### **Southern Monterey County Foundation**

- Granted \$25,300 (\$168,000 since '14)
- \$411,000 raised/pledged through 2021

### **Community Fund for Carmel Valley**

- First competitive grants awarded in 2021  
\$29,242 to 10 organizations.
- \$280,083 raised through 2021 (most for Carmel Fire)

### **Weston Call Fund for Big Sur**

- First competitive grants awarded in 2021  
\$37,500 to 8 organizations, \$38,100 raised through 2021
- Big Sur Disaster Relief Fund \$55,761 in gifts, \$43,797 granted

# PHILANTHROPIC LEADERSHIP

## Siembra Latinos Fund



**Siembra Latinos Fund**  
OF THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY

- \$128,000 raised/pledged since inception
- Granted \$23,000 to 6 nonprofits (\$80,000 cumulative granted).
- Mailed first broad annual appeal



# PHILANTHROPIC LEADERSHIP

## Communications

- Shared stories of impact through "faces of philanthropy" campaign
- Supported communications for COVID-19 Collaborative with communications toolkit
- Produced three print newsletters, annual report and multiple e-news and annual appeals
- Expanded Social Media reach and engagement

**Facebook:** Increased 9.7% to 4,268 followers

**Twitter:** Increased 6.4% to 1,696 followers

**Linked In:** Increased 19.3% to 1,294 followers

**Instagram:** Increased 20% to 1,196 followers

- Welcomed Communications Officer – Jane Albertson



# PHILANTHROPIC LEADERSHIP Communications-Social Media

Post details

Community Foundation for Monterey County  
April 6, 2021

Read about LOVE Big Sur and the vision of Weston Call. He was the inspiration for the Weston Call Fund for Big Sur, a special purpose fund of the Community Foundation for Monterey County which benefits nonprofits and disaster relief in the Big Sur community. [cfmco.org/LOVEBigSur](https://www.cfmco.org/LOVEBigSur)  
For more ways to love Big Sur follow <https://www.instagram.com/lovebigsur/>

3,461 People Reached

249 Reactions, Comments & Shares (👍)

|             |            |               |
|-------------|------------|---------------|
| 133 Like    | 12 On Post | 121 On Shares |
| 83 Love     | 9 On Post  | 74 On Shares  |
| 19 Comments | 0 On Post  | 19 On Shares  |
| 17 Shares   | 16 On Post | 1 On Shares   |

164 Post Clicks

|                |                    |                     |
|----------------|--------------------|---------------------|
| 25 Photo views | 60 Link clicks (👁) | 89 Other clicks (👁) |
|----------------|--------------------|---------------------|

NEGATIVE FEEDBACK

- Hide post
- Hide all posts
- Report as spam
- Unlike Page

Reported stats may be delayed from what appears on posts

Get more likes, comments and shares  
When you boost this post, you'll show it to more people.

3,461 People reached    413 Engagements

Boost post

21 Reactions    16 Shares

Facebook – Weston Call  
Fund for Big Sur  
413 Engagements  
16 shares

Cfmco.org/VIDA #community #MontereyCounty #SalinasValley #Monterey #Salinas #covid19response #COVID19'. The tweet includes a video of a woman speaking at a podium with a 'VIDA' sign and a photo of a group of women holding certificates. The tweet has 3 retweets and 11 likes."/>

Community Foundation for Monterey County  
1,300 followers  
3mo •

Congratulations to VIDA community health workers who were recently honored by the Democratic Women of Monterey County as "Champions for the Community" for their work assisting Monterey County during the ongoing pandemic. Congratulations VIDA!  
To learn more about VIDA please visit [Cfmco.org/VIDA](https://cfmco.org/VIDA)

#community #MontereyCounty #SalinasValley #Monterey #Salinas #covid19response #COVID19

3 Retweets    11 Likes

View Tweet activity    View all Tweet activity

Linked In – 25 likes

**Top Tweet** earned 4,409 impressions

Scholarships change lives! #KingCityHigh's Ismael Rocha thought college wasn't possible. Thx to @cfmco scholarships & supporters - he's looking forward to @CSUMB graduation! His story that will inspire to give to or start a scholarship fund: [cfmco.org/my-scholarship...](https://cfmco.org/my-scholarship...) [pic.twitter.com/ZPEaaW1h5o](https://pic.twitter.com/ZPEaaW1h5o)



3 Retweets    11 Likes

View Tweet activity

View all Tweet activity

Twitter - Scholarships  
332 engagements  
5 retweets

# COMMUNITY LEADERSHIP

- **COVID-19 Collaborative**

Dan continues to lead this 55-person countywide, multi-sector collaborative bringing together County, multiple cities, agriculture, hospitality, education, healthcare, CBOs and philanthropy to combat spread and impacts of COVID-19

- Administer \$5 million County-Funded CHW Program (VIDA)

- Continued work in **homelessness and affordable housing**

- **Regions Rising Together: Salinas Project**

- **Advocacy / Leadership**

- Dan on Steering Committee for Community Foundation Public Awareness Initiative
- Dan member LCCF Public Policy Committee
- Laurel member of CF National Standards Board
- Christine on board of AFP Monterey Bay



# COMMUNITY LEADERSHIP

## VIDA (Virus Integrated Distribution of Aid)



- In a 6-week door-to-door effort, 100 CHWs reached 25,811 households, held 13,839 conversations, scheduled nearly 1,100 vaccine appointments
- On average there are 23 VIDA rapid testing sites across Monterey County each week.
- In February, VIDA will support the vaccine mobile van to reach residents at worksites, school, and communities of need.
- Our [montereycountyvaccines.com](https://montereycountyvaccines.com) website has received 50,700 visits since its inception on October 19, 2021. 29,000 of these visits have been in January of 2022.
- As of January 17th, 2022, VIDA has conducted 18,907 rapid tests. 2,129 have been positive. 7,659 tests conducted in January 2022.
- As of December 2021, VIDA has been part of approximately 13,100 vaccines administered in Monterey County
- Number of Individuals reached: 326,288 as of December 2021

# ORGANIZATIONAL EXCELLENCE

## Diversity, Equity and Inclusion

- Created Board and Staff DEI Work Group  
The work group participated in specific DEI training.

### **BOARD**

- Teri Belli, Board Chair
- Betsy Buchalter Adler
- Romero Jalomo
- Birt Johnson, Jr.
- Adriana Melgoza
- Joe Pezzini
- Francine Rodd
- Abby Taylor-Silva

### **STAFF**

- Laurel Lee-Alexander, facilitator
- Kim Drabner
- Cristina Medina Dirksen
- Sarah Elias
- Mackenzie Little
- Susie Polnaszek
- Andrea Scott

- Staff DEI Committee continued monthly meetings and orientation for new staff.

# ORGANIZATIONAL EXCELLENCE

## Finance/Investment/Stewardship

- Kim succeeds Diane as VP Finance and HR!
- Accountant position is developed and filled
- Processed 7,402 gift transactions (so far)
- Clean Audit
- 9.9% YTD investment in long-term portfolio (11/30/21)
- SURVIVED staff and process changes, Gives! all during pandemic response
  - still "Here for Good"



# ORGANIZATIONAL EXCELLENCE

## Administration/Technology/Facilities

- Continued process improvement initiative with consultant to streamline gift processing
- Working with new IT providers for updated tech for the conference room
- Processed huge volume of gifts with many first-year employees
- New phone system – voicemail to email
- Successfully navigated hybrid work environment under continually changing circumstances



# ORGANIZATIONAL EXCELLENCE

## Gift Processing

The Goal of this project was to improve our efficiency with our gift process —specifically checks



| Goal  | Current Results                      | Results (Test!)   |
|---|--------------------------------------|---|
| Work time   | 1.5 hours per gift                   | 1 hour per gift   |
| Turnaround time <ul style="list-style-type: none"><li>• Start to finish w/ scanning &amp; filing</li><li>• Receipt Letter</li></ul> | Up to six months<br>1 to 5 work days | 1 or 2 days for letter mailed and final digital files saved |
| Process Steps   | 86                                   | 56  |
| Accuracy (recorded, receipt letter, fund allocation, etc)   | 2-3 errors in 2020 (highly accurate) | Continue to be highly accurate                              |
| Internal controls   | Strong                               | Strong  |

# ORGANIZATIONAL EXCELLENCE

## New Staff



Welcome!



# ORGANIZATIONAL EXCELLENCE

## Team CFMC – All Staff

Zoom Meeting

Recording...

|                          |                |                 |                  |              |
|--------------------------|----------------|-----------------|------------------|--------------|
| Laurel Lee-Alexander     | Jane Albertson | Brian Thayer    | Amanda Holder    | Kim Drabner  |
| Gianna                   | Maria Hauman   | Jasmine Menor   | Chalet Booker    | Sarah Elias  |
| Clarisa Chisum           | Dan Baldwin    | Esther Figueroa | Christine Dawson | Janet Shing  |
| Susie Polnaszek she/her  | Joel Hernandez | Reid Norris     | Michael Castro   | Andrea Scott |
| Karina Gutierrez-Barboza |                |                 |                  |              |

# ORGANIZATIONAL EXCELLENCE

## CFMC Board of Directors

Welcomed three new board members!



Jesse Lopez



René Mendez



Larry Oda

# ORGANIZATIONAL EXCELLENCE

## Board of Directors



**Teri Belli** (Chair), Belli Architectural Group



**Kirk Gaffill** (Vice Chair), President/CFO, Nepenthe/Phoenix Corporation



**Jan Vanderbilt**, (Treasurer), Vanderbilt Certified Public Accountants



**Loren Steck** (Secretary), Entertainment Industry Consultant



**Romero Jalomo**, Vice President of Student Affairs, Hartnell Community College



**Elsa Mendoza Jimenez**, Director of Health Services, Monterey County Health Department



**Nolan Kennedy**, Attorney at Law, Kennedy, Archer & Giffen



**Judy Guzman Krueger**, President, Tulipán LLC



**Giff Lehman**, Founder, Integris Wealth Management (Retired)



**Jesse Lopez**, Managing Partner of Bianchi, Kasavan & Pope, LLP



**Adriana Melgoza**, Director of Organizing and Education, Center for Community Advocacy



**René Mendez**, City Manager, City of Gonzales



**Fred Meurer**, Owner, Meurer Municipal Consulting



**Larry Oda**, Community Volunteer, Former President Monterey JACL



**Betsey Pearson**, Non Profit Consultant, Retired United Way



**Joe Pezzini**, Senior Director of Agricultural Operations, Taylor Farms



**Francine Rodd**, Executive Director, First Five Monterey County



**Abby Taylor-Silva**, Executive Vice President, California Agricultural Leadership Foundation



**Jennifer L. Walker**, Attorney/Principal, Leach & Walker



# Feedback? Questions? Comments?



BREAK





*Here for Good*

**Community Foundation**

for Monterey County

## FUND FOR MONTEREY COUNTY

**What is it? What does it do? How do we grow it?**

**CFMC Board Retreat  
January 22, 2022**

# The Fund for Monterey County (FFMC)

## CFMC Strategic Plan (adopted June 2020)

### **Goal Two: Philanthropic Leadership**

*Inspire and facilitate philanthropy for equitable outcomes throughout Monterey County.*

### **3. Grow discretionary assets**

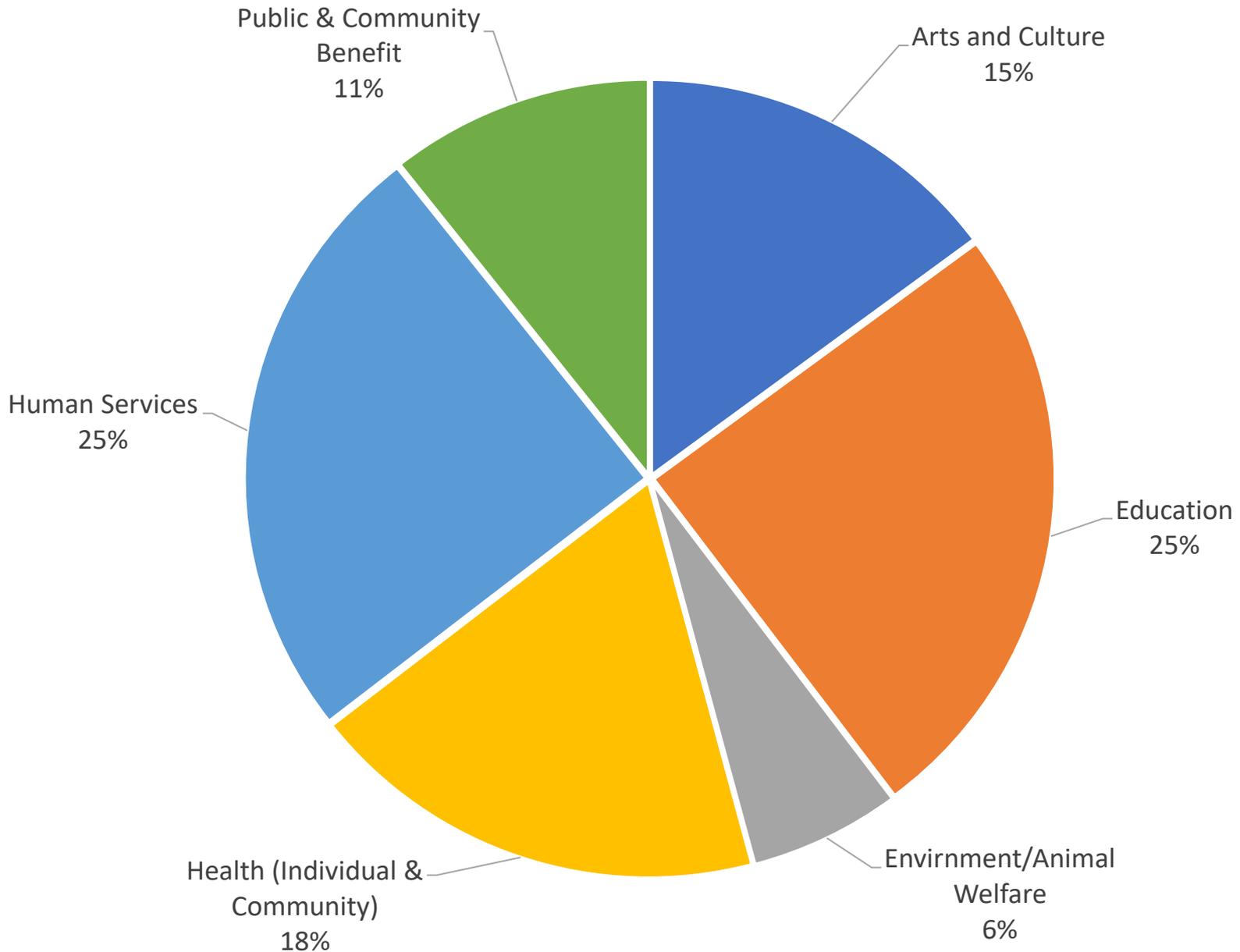
(Fund for Monterey County) in order to resource the CFMC's ability to make targeted investments and respond to changing needs over time

# What is the FFMC?

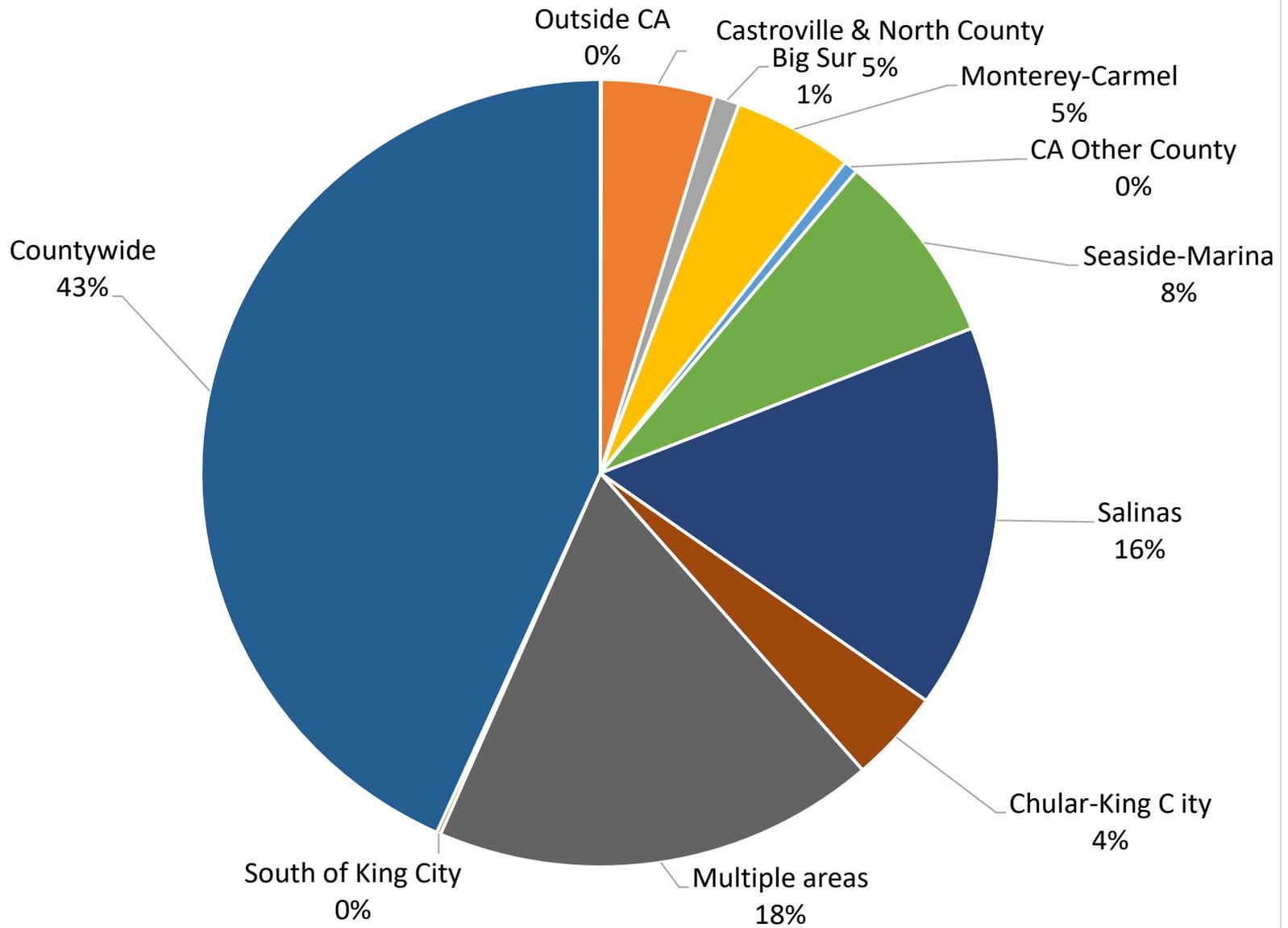
The FFMC is the CFMC's discretionary grant pool.

- It consists of Unrestricted and Field of Interest Funds
  - Unrestricted Funds give the CFMC full discretion on their use  
**This is the gold standard of CF assets**
  - Field of Interest Funds name areas of interest, but leave specific grant decisions to the CFMC
    - Fund for the Environment
    - Doud Fund (historic preservation in the City of Monterey)
    - Anita Tarr Turk Fund for Breast Cancer Research
    - Ruth and Wilbur Amonette Fund for Arts Education
    - Fund for Homeless Women
- Supports the Community Impact grant program, the CFMC's largest discretionary grant program
- Gave Fund for Monterey County its name in 2018
  - Used to be called the "general endowment"
  - Wanted to describe a more specific purpose

# 2021 FFMC Grants by Program Area



# 2021 FFMC Grants by Region



# FFMC Data (9/30/21)

## **Unrestricted pool**

- 29 funds
- \$32 million
- All endowed (equates to ~\$1.35MM ATS)
- Vast majority support CI grant program

## **Field of Interest pool**

- 45 funds
- \$43 million
- Not all endowed
- Not all support CI
  - Fund for Homeless Women
  - Robert and Virginia Stanton Fund
  - Anita Tarr Turk Fund

## **Designated Funds**

- 48 funds
- \$81 million
- Four funds comprise \$55 million of the \$81 million

# Where do FFMC Assets Come From?

## FFMC is largely funded through estates

- **Direct bequests, CRTs, CGAs, “retired” DAFs**  
Largest UR fund is a private foundation conversion (Lauralee and JJ Irvine Fund)
- **Field of Interest funds**  
Donors select causes rather than specific agencies  
Designated funds (supporting specific agencies) are very common  
Some FOI funds actively raise money
  - Siembra Latinos
  - Fund for Homeless Women
  - Fund for the Environment
- **Unrestricted funds often simply lack a designation**  
Drummond Fund  
All undesignated estate gifts go in the FFMC



# How does the CFMC compare?

| 2021<br>Community<br>Foundation | Assets     | DAF Assets | Assets Endowed     |        | Gifts      | Discretionary Grants |            | Total Grants |            |
|---------------------------------|------------|------------|--------------------|--------|------------|----------------------|------------|--------------|------------|
|                                 | \$Millions | \$Millions | %Percent<br>Number |        | \$Millions | Number               | \$Millions | Number       | \$Millions |
| Santa Cruz County               | 166        | 58         | 45                 | 9,762  | 43         | 422                  | 7          | 2,097        | 21         |
| Sacramento Region               | 174.9      | 76.1       | 71.60              | 5,820  | 19         | 189                  | 1.5        | 3,123        | 19.6       |
| Ventura County                  | 176        | 27         | 76                 | 2,764  | 20         | -                    | -          | 1,942        | 20         |
| Sonoma County                   | 217        | 54         | 57                 | 1,885  | 23         | 297                  | 8          | 1,456        | 22         |
| Monterey County                 | 348.4      | 84.8       | 56                 | 8,126  | 53.5       | 324                  | 6.6        | 2,241        | 27.15      |
| Orange County                   | 480        | 305        | 38                 | 2,390  | 105        | 178                  | 4          | 3,285        | 91         |
| Santa Barbara                   | 509        | 100        | 11                 | 1,869  | 34         | 400                  | 8          | 3,153        | 31         |
| East Bay                        | 774        | 474        | 7                  | 3,897  | 452        | 485                  | 8          | 2,850        | 76         |
| San Diego                       | 1,070.2    | 559        | 51                 | 5,060  | 93.8       | 127                  | 3          | 6,353        | 77.8       |
| San Francisco                   | 1,530      | 528        | 54                 | 2,082  | 217.3      | 1,037                | 49.9       | 7,702        | 240.10     |
| California                      | 1,915      | 843        | 31                 | 9,800  | 403        | 500                  | 300        | 10,000       | 313        |
| Marin                           | 3,122      | 998        | 36                 | 1,094  | 488        | 212                  | 47         | 6,519        | 214        |
| Silicon Valley                  | 12,010     | 9,926      | 3.1                | 11,686 | 2,415      | 1,395                | 80.5       | 17,586       | 1,955      |

# What does Future FFMC Growth Look Like?

|  |            |                    |
|--|------------|--------------------|
| <b>Verified FFMC Expectancies</b>                                |            |                    |
|  |            |                    |
| Field of Interest through estates                                | 27,200,000 |                    |
| Unrestricted through estates                                     | 33,850,000 |                    |
| <b>Estate Gift subtotal (when donor has communicated amount)</b> |            | <b>61,050,000</b>  |
| CRTs/CGAs Unrestricted   | 1,356,000  |                    |
| CRTs/CGAs Field of Interest                                      | 6,830,000  |                    |
| <b>CRT/CGA Total</b>   |            | <b>8,186,000</b>   |
| <b>DAF Additions through Estates</b>                             |            | <b>35,593,000</b>  |
|  |            |                    |
| Current balances DAF Field of Interest                           | 6,756,575  |                    |
| Current balances DAF Unrestricted                                | 55,430,090 |                    |
| <b>Existing DAFs, Current Balances</b>                           |            | <b>62,186,665</b>  |
|  |            |                    |
| <b>Total Estimated Expectancies</b>                              |            | <b>167,015,665</b> |

# How do we Grow the FFMC?

Combination of face-to-face discussion with collateral materials

- Christine, Andrea and I talk about it with prospects, donors and professional advisors
- Gets discussed at time of introduction
- PSOs can reference it in annual review with DAF holders
- Message differentiates between naming specific organization versus leaving decision to CFMC to make grants to agencies doing work in the donor's area of interest
- Unrestricted gift conversation focuses on the ability to have assets that can respond to needs as they change over time
- Challenge is to have the estate planning conversation before estate documents are finalized

# How do we Grow the FFMC?

## Communications

- Page and links on Website
- Flyer
- Inclusion in newsletters, annual report and featured in donor stories
- Legacy Society event/communications
- Stories of impact on social media

## Create a “campaign”

- Not a capital campaign that seeks pledges in lifetimes (though it's been done)
- An aggressive awareness campaign
- Professional advisors
- Find a lead donor(s) and attach name/face to FFMC
- Bill Quarton - Lead gift can set a powerful example others want to follow



### Fund for Monterey County

The Fund for Monterey County, formerly known as the General Endowment, and was created to respond to the changing needs of our community. It is a permanent fund of the Community Foundation for Monterey County (CFMC), and is invested to grow and grant in perpetuity.

### Responsive Philanthropy

Because the Fund for Monterey County is the combination of endowed unrestricted and field of interest funds, grants support a wide variety of causes each year. Grants are reviewed and allocated through the Community Impact grant program.

The Fund also provides resources for emerging needs, such as the COVID-19 pandemic response and disaster relief.

### How it Works

- Your unrestricted gift provides the philanthropic resources to meet current and future challenges.
- You can designate the Fund for Monterey County as a beneficiary of your will or trust. We can help you or your attorney with sample bequest language.
- You can give directly to the Fund for Monterey County or name the Fund as the beneficiary of your donor advised fund.
- Your gift creates a source of community capital, helping to do good work forever.

No matter the challenges, your gift will make an important difference.

HEALTHY, SAFE, VIBRANT Communities



"I included the Fund for Monterey County in my giving because I feel good knowing the fund will meet the needs of our community, even as they change over time. The Community Foundation for Monterey County is 'Trust'."

- Bertie Elliott, Legacy Society Member  
Bertie Elliott, a long time CFMC donor advised fund holder and former board chair, has designated the Fund for Monterey County as a partial beneficiary of her donor advised fund.

She appreciates that the Fund for Monterey County is invested to grow over time and will forever benefit the people and places of Monterey County.



FEEDBACK? QUESTIONS?  
COMMENTS?



# BREAKOUT SESSION

## 2022 CFMC PRIORITIES

- Affordable Housing
- Growing the Fund for Monterey County
- Digital Divide
- Communication of values-based philanthropy