

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.*

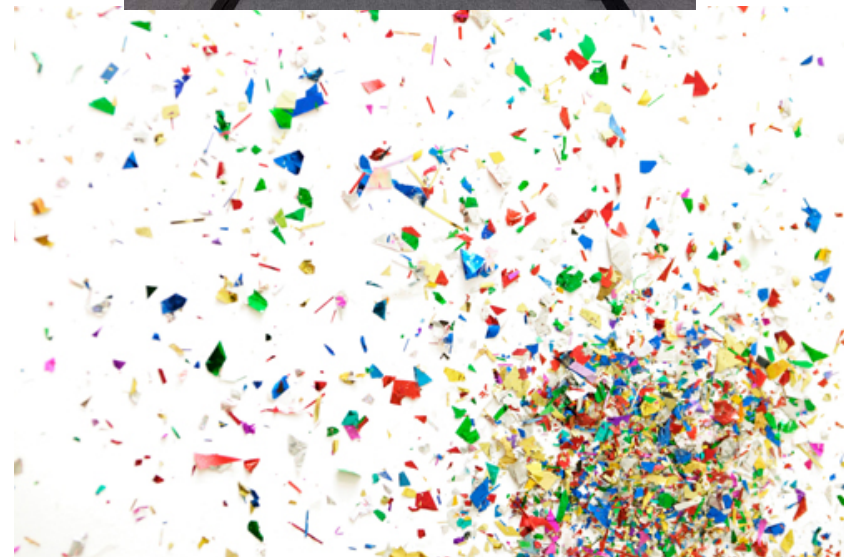
- ✓ 5) Created and Filled Grants and Data Manager Position plus Senior Accountant
- ✓ 4) Approved Investment Policy Statement & Advocacy Guidelines
- ✓ 3) Sale of 3200 17-Mile Drive
- ✓ 2) \$31,037,246* Total Gifts
- ✓ 1) Record Grants!
\$19,234,640*

*(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



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

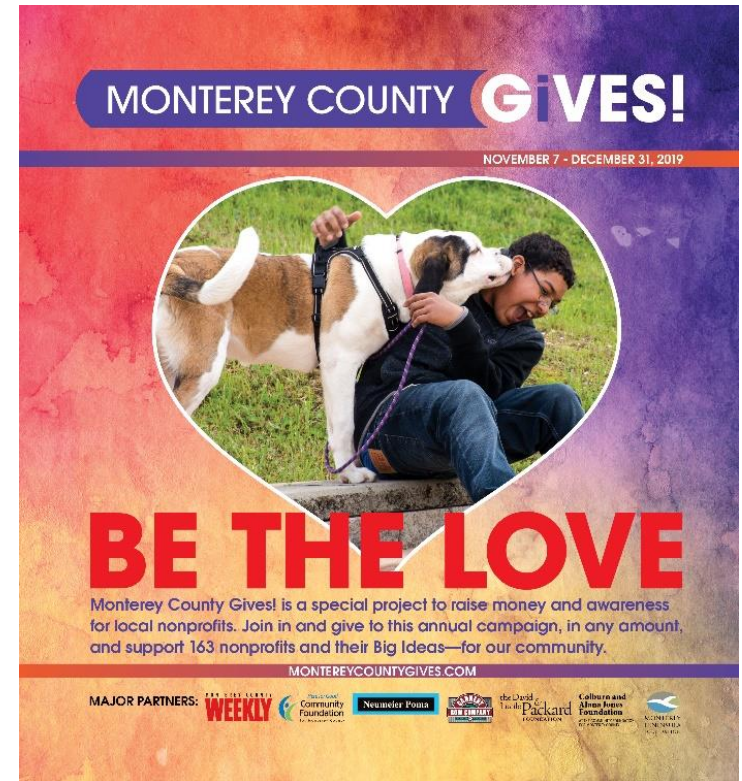
- ▶ Donor Advised: 15
- ▶ Scholarship: 7
- ▶ Designated: 4
- ▶ Stewardship: 3
- ▶ Special Purpose: 3
- ▶ General Endowment: 2
- ▶ Field of Interest: 1

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)



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

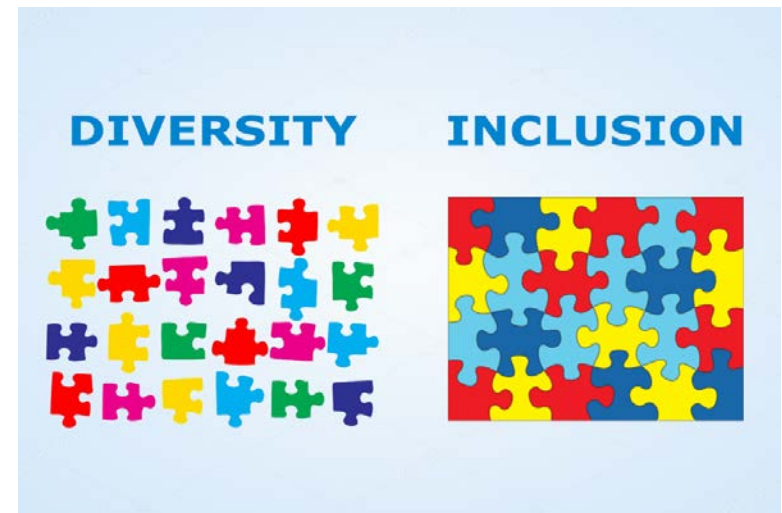
- ▶ Hired Senior Accountant
- ▶ Clean Audit
- ▶ New Investment Policy Statement
- ▶ Sale of 3200 17 Mile Drive
(largest contribution with most moving parts)
- ▶ Sale of the Brooks and Palmeroo properties
- ▶ Added Remote Deposit Capture



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?

