



Here for Good

Community Foundation
for Monterey County

2022 Year in Review
CFMC Board Meeting

February 28, 2023



2022 TOP 10

- ✓ 10) Awarded \$1.7 million in scholarships to 431 students
- ✓ 9) Successful launch of SIEDI (Salinas Inclusive Economic Development Initiative)
- ✓ 8) Held **in-person** Celebration of Philanthropy, donor education and affiliate fund events, and LEAD Institute
- ✓ 7) Welcomed Deneen, Julie, Colby and Kathleen to the board
- ✓ 6) DEI work continued with staff and board/staff work group

2022 TOP 10, cont.

- ✓ 5) Expanded Community Impact Investment program
- ✓ 4) Led the COVID19 Collaborative and VIDA (Community Health Worker program); transitioning to Community Wellness Collaborative
- ✓ 3) Record \$11.2 Million raised through Monterey County Gives!
- ✓ 2) Total Gifts \$31,379,130
- ✓ 1) Granted \$31,505,191



But wait, there's more!

- Updated CFMC Bylaws
- Celebrated Siembra Latinos Fund 5th Anniversary, Fund for Homeless Women and Center for Nonprofit Excellence 10th Anniversaries
- Upgraded conference room multi-media
- Identified new database provider; 2023 installation awaits! Yikes!
- Successful bank RFP
- Another clean audit!
- \$332,858,913 in Assets (12/31/22)



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

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**

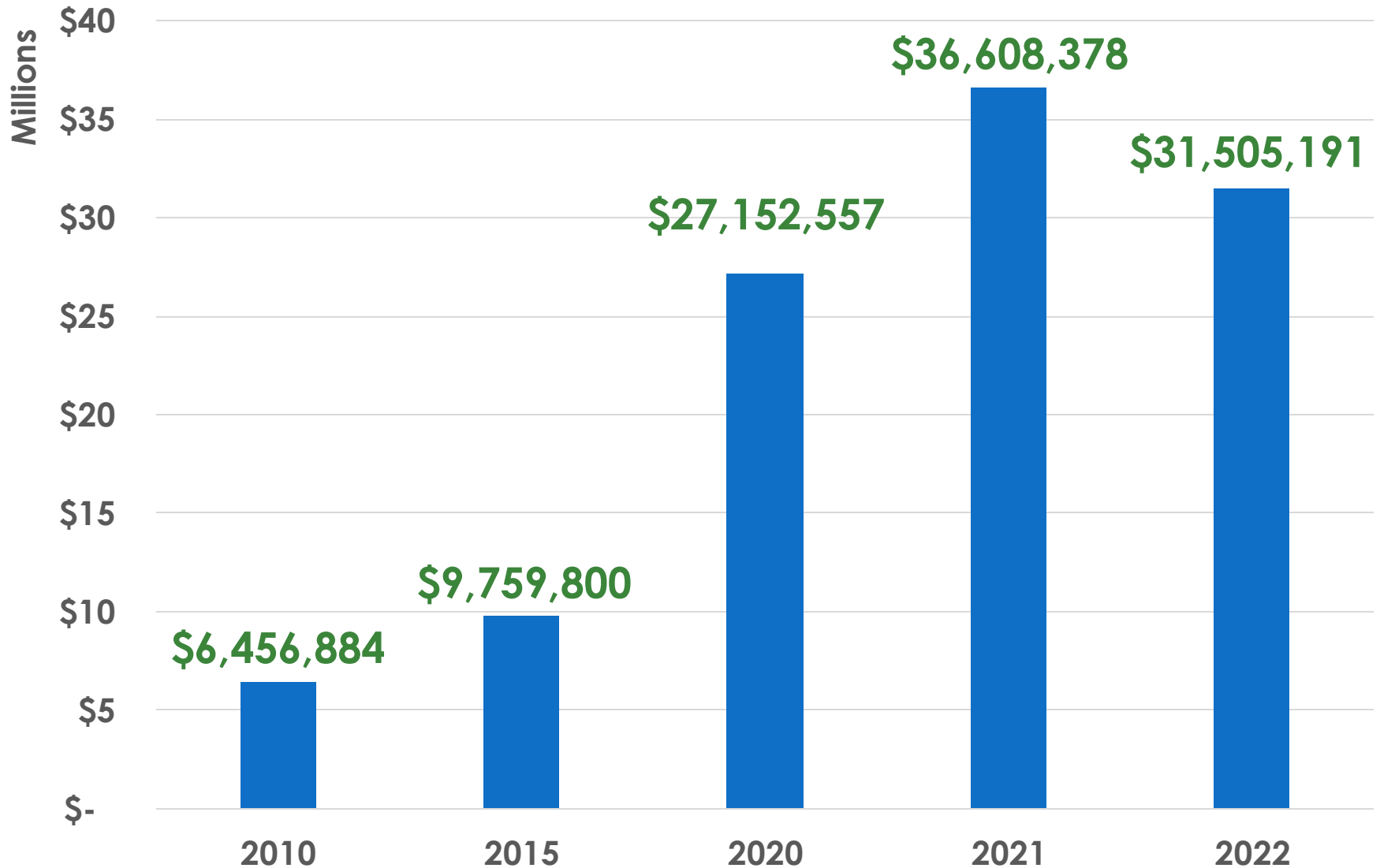
Optimize performance and stewardship for maximum impact.

COMMUNITY IMPACT Grantmaking 2022

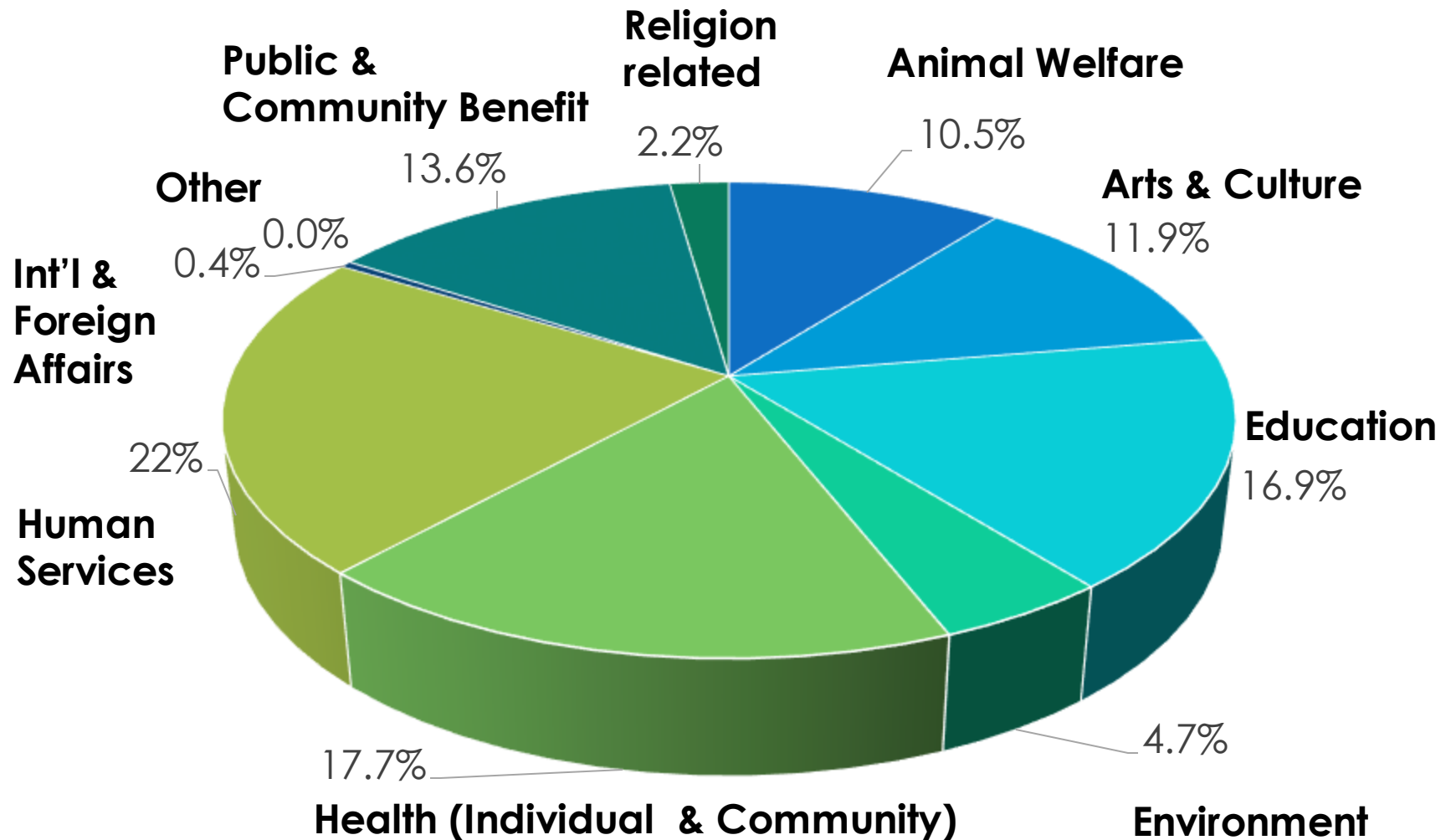
- Granted \$31 million
- Awarded \$4,310,946 via COVID-19 Relief Fund grants (2020, 2021, 2022)
- Awarded \$1,020,858 via Monterey County Fire Relief Fund grants (2020, 2021, 2022)
- Created and managed Year 1 of Salinas Inclusive Economic Development Initiative
- Continued streamlined and expanded Community Impact grants and scholarships



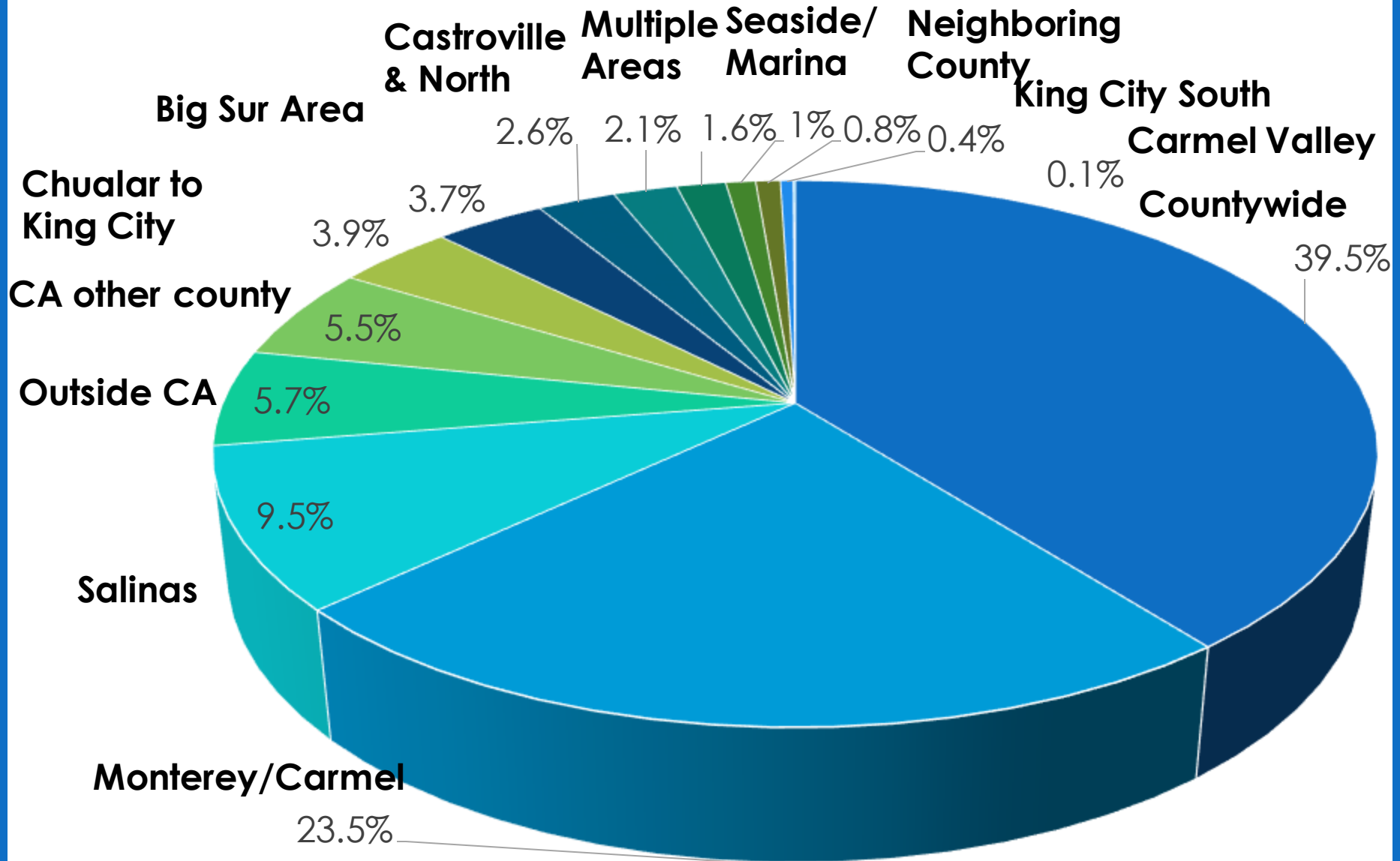
2022 Total Granted: \$31,505,191



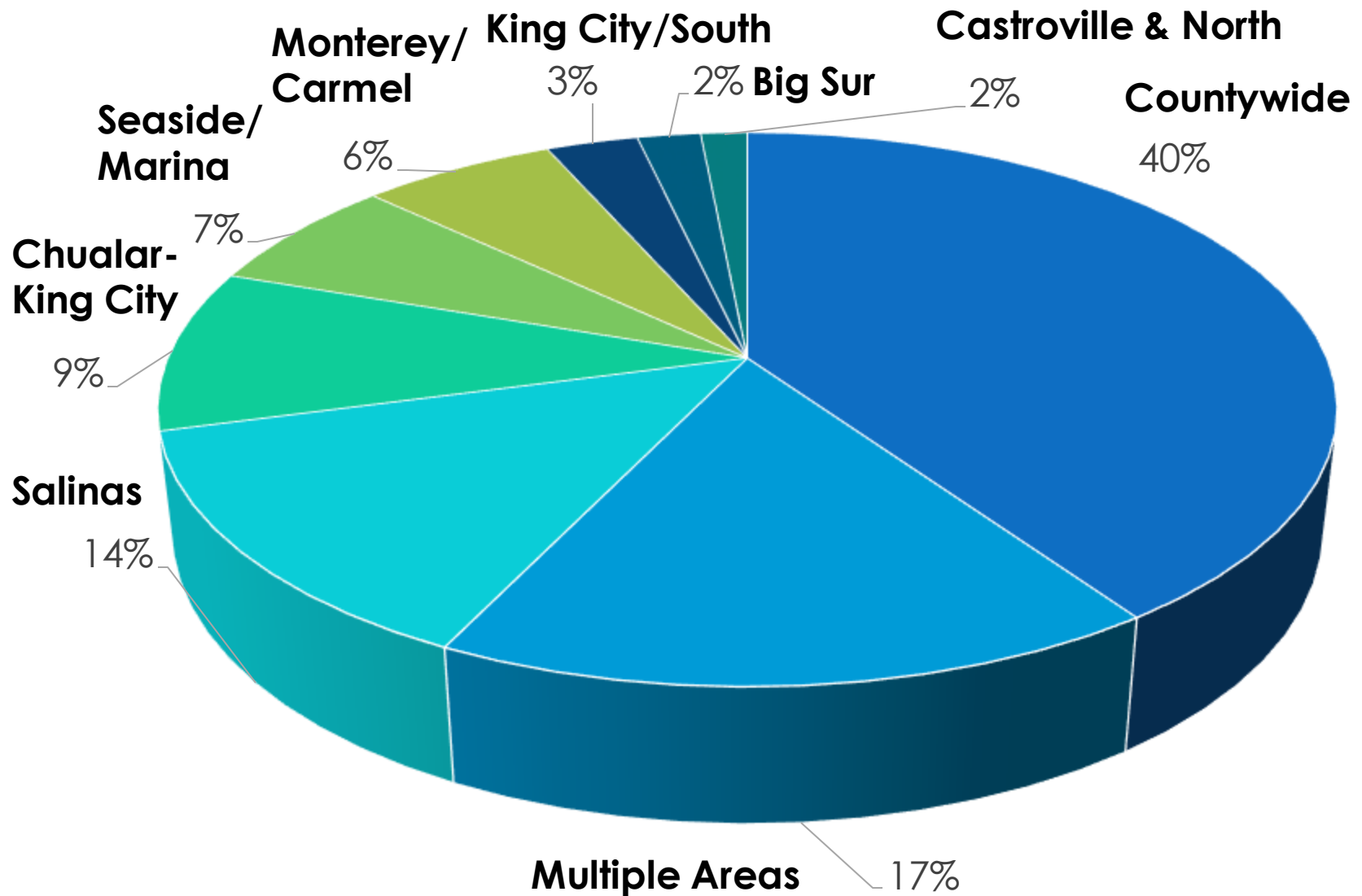
Total Granted (by Program Area)



2022 Total Granted (by Region) %



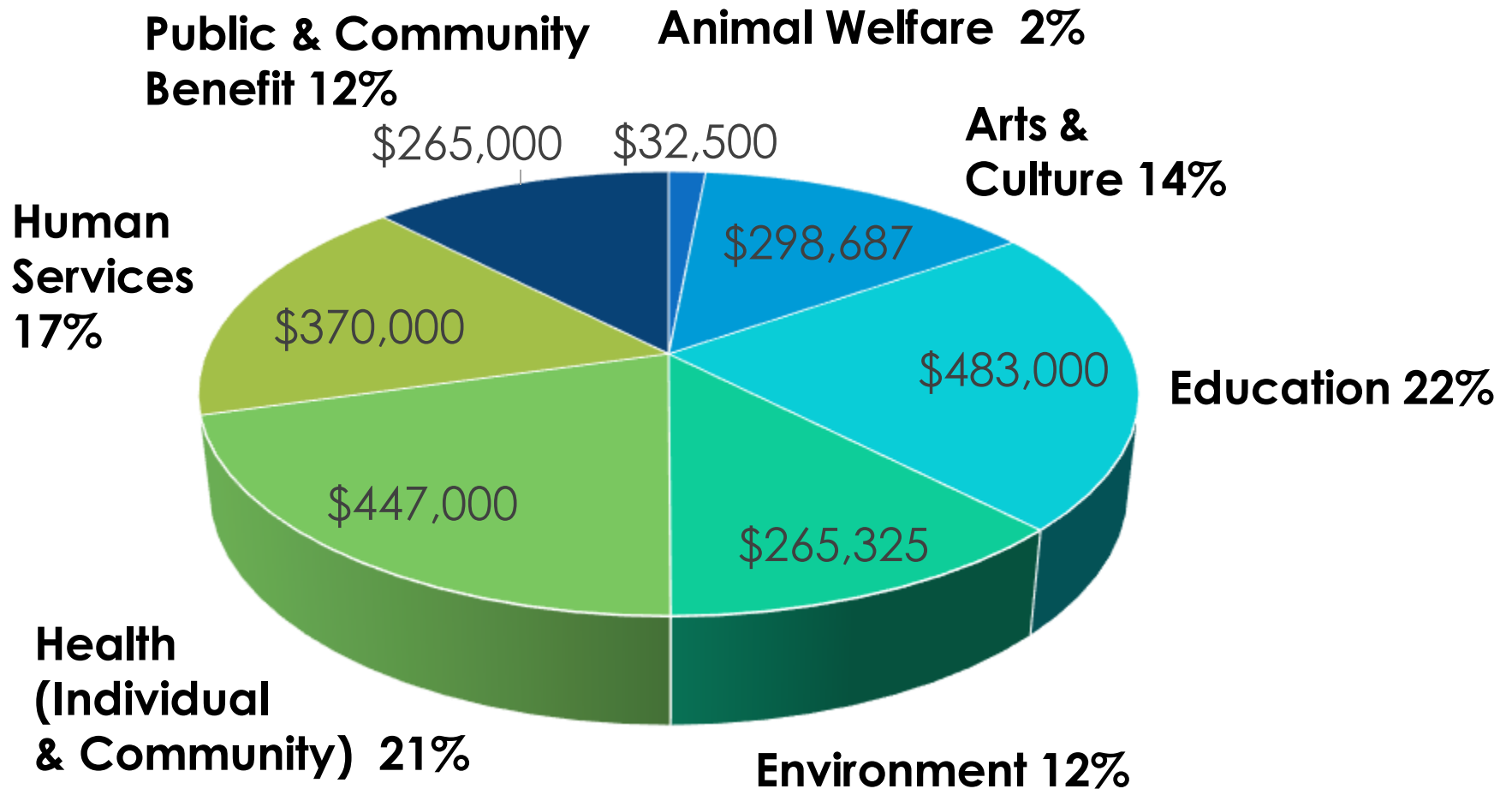
2022 CI Grants by Region



2022 Community Impact Grants (by Region)

Region	Total	# of Grants
Countywide	872,500	32
Multiple areas	363,000	16
Salinas	295,000	15
Chualar-King City	205,000	7
Seaside-Marina	145,000	8
Mry-Carmel HL	138,025	8
King City & South	65,000	3
Castroville & North	45,000	2
Big Sur Area	32,987	2
Grant Total	2,161,512	93

2022 CI Grants by Program Area



2022 Community Impact Grants (by Program Area)

Program Area	Total	# of Grants
Animal Welfare	\$ 32,500	2
Arts and Culture	\$ 298,687	17
Education	\$ 483,000	20
Environment	\$ 265,325	11
Health (Individual & Community)	\$ 447,000	20
Human Services	\$ 370,000	15
Public & Community Benefit	\$ 265,000	8
Total:	\$ 2,161,512	93

COMMUNITY IMPACT Center for Nonprofit Excellence



- Awarded over \$100K in Organizational Development grants
- 163 organizations engaged with CNE
- 11 new EDs received customized coaching; Reached 40 EDs through Breakfast Roundtables
- Published Guide to Leadership Transitions
- Created Challenge Gift training video for MC Gives (150 views)
- 11 LEAD Institute graduates; 24 selected for 2023 cohort

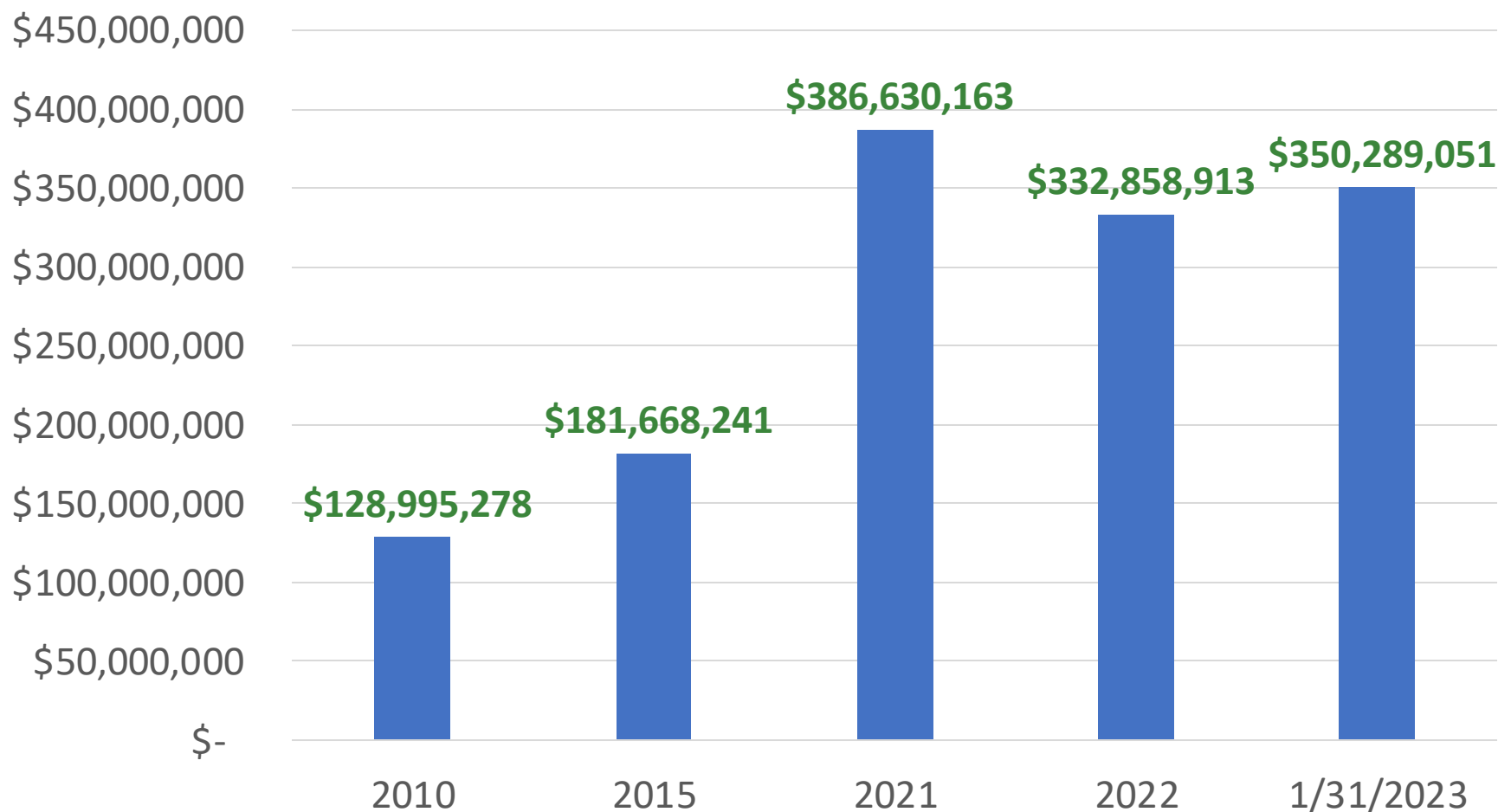


PHILANTHROPIC LEADERSHIP 2022

- Established 45 New Funds
- Added 9 Legacy Society Members – 303 total
- 4 CGAs
- Grew total expectancies to \$286 million
- Fund for Monterey County expectancies grew by more than \$80 million
- Held in-person Celebration of Philanthropy, affiliate fund, Women's Fund, donor education, professional advisor plus virtual Legacy Society events
- Updated Gift Acceptance Policy and developed new values-based grantmaking policy
- Added Ceci Romero as Director of Gift Planning



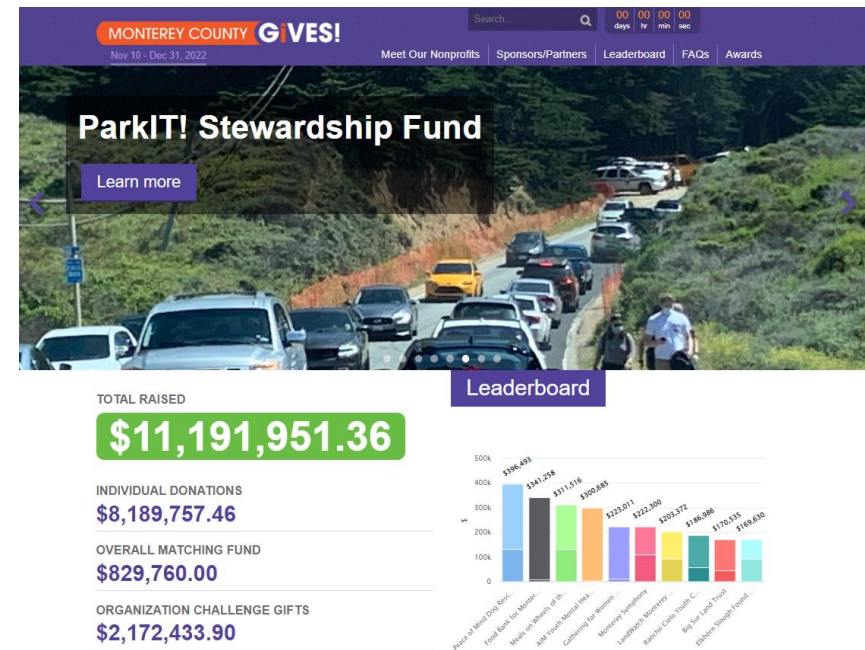
CFMC Total Assets



PHILANTHROPIC LEADERSHIP 2022

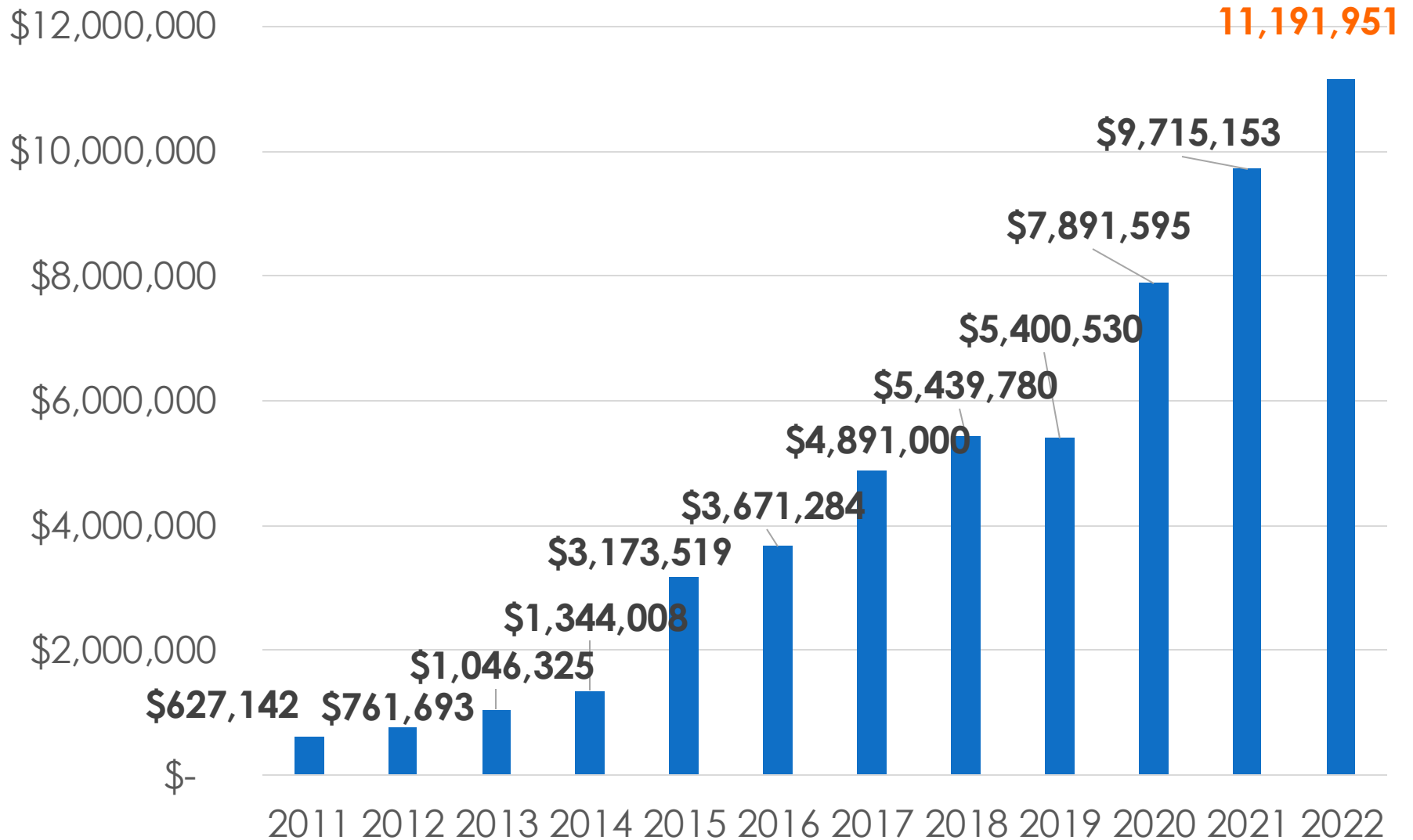
Monterey County Gives!

- Record \$11.2 million raised (\$9.64 million 2021, \$7.88 million 2020)
- Individual Donations \$8,189,757
- Overall match \$829,760 (\$929,139 in 2021)
- Challenge grants \$2.17 million (\$1.86 million in 2021)
- Record 7,698 Donors (7,504 in 2021)



Monterey County Gives!

\$56 Million total raised (2000-2022)



PHILANTHROPIC LEADERSHIP 2022

Affiliate/Special Purpose Funds

Northern Monterey County Foundation

- Granted \$40,000 (\$200,000 since '17)
- \$612,000 raised/pledged through 2022

Southern Monterey County Foundation

- Granted \$25,300 (\$168,000 since '14)
- \$463,000 raised/pledged through 2022

Community Fund for Carmel Valley

- Granted \$22,500 (\$217,242 cumulative since 2020)
- \$343,000 raised through 2022 (most for Carmel Fire)

Weston Call Fund for Big Sur (Special Purpose Fund)

- Granted \$40,000 (\$77,500 since 2021)



PHILANTHROPIC LEADERSHIP 2022

Siembra Latinos Fund

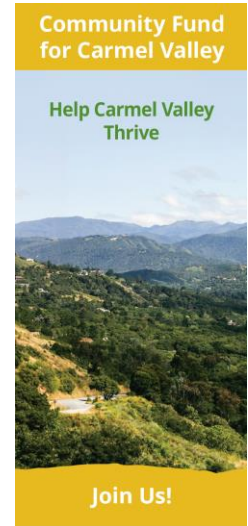
- Celebrated 5th Anniversary with successful event
- Granted \$20,000 (\$80,000 cumulative granted)
- Raised \$27,200 through participation in 2022 Monterey County Gives! campaign
- Raised more than \$156,000 since inception



PHILANTHROPIC LEADERSHIP

Communications

- Developed custom brochures for Weston Call Fund for Big Sur and Community Fund for Carmel Valley
- Produced Siembra Latinos Fund video for Anniversary TV campaign
- Grew fans and followers on all social media channels:
 - 1,700 (Twitter)
 - 1,300 (Instagram)
 - 4,700 (Facebook)
 - 1,600 (Linked In)
- Conducted media outreach including article and events round up in Coastal Grower Magazine



Communications - Key Channels

- Print Publications
- Advertising
- Enews
- Social Media



Give Where You Live

"We like to give back to make a difference in the place we call home."

— John and Annette Romans
John and Annette Romans Family Fund,
Mission Ranches Fund

Develop your giving plan. We can help.

- Donor Advised Funds
- Charitable Estate Planning

The Romans give back through their donor advised and company funds. "We like to give local."

Here for Good Community Foundation for Monterey County

"We trust the Community Foundation as a partner in philanthropy because they care."

Here for Good Community Foundation for Monterey County

— Birt and Kathleen Johnson, Jr.
Birt and Kathleen Johnson Jr. Fund,
a donor advised fund of the CFMC

See their story!

Record \$36 Million Granted

At 2021 began, we couldn't imagine the coming year would surpass the prior year in philanthropic impact. 2020 had set records, with the highest grant totals ever awarded in the Community Foundation for Monterey County (CFMC)'s history.

— Dan Bodwin, President/CEO

Gifts large and small worked together to fund critical needs and make a meaningful difference.

The CFMC is grateful to the donors who partnered with us to help meet the needs of our neighbors. From youth programs, services for seniors and those without shelter to arts, environmental causes and COVID-19 relief, hundreds of organizations were strengthened because of this invaluable support.

The CFMC is honored to partner with its many generous donors every year who help create healthy, safe and vibrant communities throughout Monterey County.

To learn how the CFMC can help you give back, call us at 831.375.9712 or visit cfmc.org/WaysToGive.

Support Extended for VIDA Community Health Worker Program



With a solid infrastructure that can quickly adapt when needed, the VIDA Virus Integration became testing a success. They are more than just a COVID-19 vaccine and testing site. They are a community health worker (CHW) program.

Here for Good Community Foundation for Monterey County

Together We Give!
Giving Tuesday - November 29, 2022

Together we give. Nov 29, 2022

MONTEREY COUNTY GIVES!
Joining Together for Big Ideas

Here for Good Community Foundation for Monterey County

Community Foundation for Monterey County
Published by Amanda Holder | October 28, 2022

Full house at today's Executive Director Roundtable Breakfast presented by the Center for Nonprofit Excellence Community Foundation for Monterey County! Save the date 12/2 and nonprofit ED's are welcome to sign up and join us for the next one. 🙌

<https://www.cfmc.org/.../executive-director-breakfast/>

COMMUNITY LEADERSHIP

SIEDI (Salinas Inclusive Economic Development Initiative)

- A two-year initiative created by CFMC
- Granted \$100,000/year to each of the 9 nonprofit partners
- Granted \$20,000/year to each of the 5 advisory nonprofits
- Created individual action plans for each partner
- Held convening on 12/15/22 to celebrate the work that has been done and move on to next steps of building relationships with those who can make change



COMMUNITY LEADERSHIP

COVID-19 Collaborative/VIDA

- Continued coordination of VIDA (Virus Integrated Distribution of Aid) Community Health Workers program
- Our montereycountyvaccines.com website has received 100,000 visits
- Offered businesses free webinars to help them navigate Covid laws and workplace regulations
- Attracted more than \$2 million in outside funding (PHI, Packard, CCAH) to support VIDA and Collaborative. Transitioning to community wellness collaborative focused on mental health.
- VIDA CHWs spoke with 853,744 people and conducted 53,959 rapid tests



ORGANIZATIONAL EXCELLENCE

Diversity, Equity and Inclusion

- Held Implicit Bias training with consultant for all staff
- Board/Staff DEI Work Group specific DEI training

BOARD

- Adriana Melgoza, Co-facilitator
- Teri Belli
- Elsa Mendoza Jimenez
- Francine Rodd
- Abby Taylor-Silva

STAFF

- Laurel Lee-Alexander, Co-facilitator
- Clarisa Collins
- Joel Hernandez
- Susie Polnaszek

- Worked with facilitators to plan 2023 Board DEI training
- Staff DEI Committee - monthly meetings, annual staff survey and resource sharing, new staff orientation



ORGANIZATIONAL EXCELLENCE

Finance/Investment/Stewardship

- Conducted recruitments for, and hired, 4 FT permanent positions; CFMC is now fully staffed in all departments
 - Includes new Director of Finance
- Collaborated with Director of Operations to select a new financial database to be implemented in 2023
- Updated Personnel Policy; to be presented to Board in 2023
- Completed Banking RFP
 - Selected new banking partner
 - Transition to be final in early 2023
- Updated finance SOPs
- Clean audit



COMMUNITY IMPACT INVESTMENT

- Expanded CI program to leverage impact; increased long-term portfolio allocation from 2% to 3%
- \$1 million loan to United Way for Impact Center in Salinas
- Continued loan program with CDFIs
- Managed loan to CHISPA for affordable housing project in South County
 - Exploring more ways to engage in affordable housing



Community Foundation for Monterey County
Impact Investing Portfolio Report



Marc Rand, Managing Partner
Community Capital Advisors
Quarter Ending: December 31, 2021
Published: May 2022

ORGANIZATIONAL EXCELLENCE

Administration/Technology/Facilities

- Upgraded Conference Room technology
- Confirmed Database Transition with goal of Sept 1, 2023 Go Live
- Welcomed Director of Gift Planning, Cecilia Romero, to Salinas office
- Reopened Monterey conference room as resource for local nonprofits, utilized by 10 organizations
- Successful process implementations (Donation intake, new fund setup, new MC Gives! donation methods)
- Hosted 1st Board Holiday Party since 2019
- Installed DAF Cat cam



ORGANIZATIONAL EXCELLENCE

Professional Development & Service

- 11 staff attended various Community Foundation Trainings in 2022
- Dan became a founding member of the Council on Foundations CF Advisory Committee
- Continues on the steering committee of the Community Foundation Awareness Initiative a national lobbying effort and member of the LCCF Public Policy Committee.
- Laurel Lee-Alexander, board member, Community Foundations National Standards Board
- Christine Dawson, board member, AFP Monterey Bay



ORGANIZATIONAL EXCELLENCE

CFMC Staff



ORGANIZATIONAL EXCELLENCE

CFMC Board of Directors

Welcomed four new board members!



Deneen Guss
Superintendent
Monterey County
Schools



Kathleen Lee
Executive Director
Point Lobos
Foundation



Colby Pereira
Vice President,
Operations,
Braga Fresh
Family Farms



Julie Roth
Wealth Manager
Monterey Private
Wealth

2023 CFMC Board of Directors



Feedback? Questions? Comments?



2023 Strategic Priorities Community Impact



2023 Strategic Priorities/CEO goals (provided in Fall 2022, with some additions)

Community Impact		
Goal	Process	2023 Result
Continue to deepen the CI department's impact through increased proactive engagement with the nonprofit community.	With workplaces returning to normal, CI staff (Laurel, Janet and program officers) will be tasked with in-person site visits to our nonprofit partners (beyond the site visits that occur in the grant cycle). The goal is to gain a clearer understanding of the health of the sector and find ways the CFMC can engage in even deeper partnerships. Goals is to meet with 50 – 75 nonprofits in 2023.	
Successful year two of the Salinas Inclusive Economic Development (funded by the James Irvine Foundation) which will lead to a grant application at the end of 2023 and extend the program for two years.	Entering year two of what has been a very successful start to SIEDI. Continuing this <u>success that</u> will lead to a grant application that Irvine has requested.	
Explore better utilization of data for understanding how CFMC investments can address equity issues.	Capacity has been developed within CI to address this. JIF3 has a data component that will assist in building methodologies that can be applied to our overall work.	

Philanthropic Leadership

Philanthropic Leadership		
Goal	Process	2023 Result
Continue to emphasize strategies to grow the Fund for Monterey County. This will be augmented by the development of a Memorandum of Charitable Intent.	We just learned that a donor has put the FFMC in their estate plan for \$45 million, so clearly the messaging is working. The Fund for Monterey County is our discretionary asset pool. Growing these assets provides the CFMC the ability to direct grants towards greatest needs as they change over time. FFMC is ever-present in development conversations, but we want to continue to make it a priority in social media and marketing. This is a long-term strategy that is at the core of the CFMC's role in Monterey County.	
Continue to build CFMC depth of expertise in planned giving and complex gifts.	The Director of Gift Planning position turned over in 2022, so a renewed emphasis on training is paramount. More and more conversations with prospects include donations of real estate, shares in LLC's or privately held businesses, and the establishment of life income vehicles. Equipping more philanthropic services staff with the ability to navigate questions in real time will be very useful. Now that in-person conferences are back, more PS staff will be offered professional development.	
Reinstate in-person Women's Fund Luncheon. Transition Legacy Society luncheon to a more targeted, less costly, education session on planned giving. Relaunch donor education events.	Women's Fund luncheon will be brought back. Legacy Society will experiment with a new format. As budget allows, may schedule a LS luncheon.	
Engage professional advisors through one-on-one or group meetings in their offices. Hold group PA event similar to what was held in 2022. Add wealth advisor to the Philanthropic Services Committee	It has been three years since we've felt comfortable scheduling meetings with professional advisors in their office. This will commence in Q1 '23. We had a very successful PA event in '22 that we'll replicate in '23. Want to build out PA input into the PS committee.	
Implement stronger year-end campaign for operations, if necessary.	Budget scenarios seem to change month-to-month as markets dip and recover. We will assess in Q3 whether a more aggressive approach to our year-end campaign will be necessary.	
Create new DAF Handbook.	Upgrade existing welcome packet to more assertively develop philanthropic partnerships beyond the transactional. Includes new "Exhibit C" which more strongly communicates CFMC values.	
Expand CFMC's grantmaking impact through an equity lens, utilizing trust-based philanthropy.	Assess grantmaking data on how it can inform decision-making.	

Community Leadership

Community Leadership		
Goal	Process	2023 Result
Pivot and rebrand the Covid 19 Collaborative to support community mental health, with an emphasis on youth and families. Incorporate community health workers (CHWs) into this through training from the County's Department of Behavioral Health	The C19C has shifted its emphasis several times as community needs changed. We thought the collaborative might sunset at the end of 2022, but a strategic planning session suggested we look at pivoting to community mental health. This will commence in Q1.	
Continued management of the VIDA program, supported by a \$500,000 Packard grant received in Q4 2022 and County support that will run through June 30, 2023.	VIDA became a vital part of testing, vaccination, quarantining and education to schools and vulnerable populations. It has already shifted to providing Medical enrollments. CHWs will likely be trained by the Department of Behavioral Health to look for potential interventions and provide access to services.	
Seeking funding to develop an Equity Fellow position at the CFMC (job has been written). Position will interact with our Systems Change group, DEI work group and work independently collecting stories and data that can guide CFMC community investments.	A funder has said they're interested in exploring this in Q1.	
Maintain growing profile of Community Impact Investment program and reinvigorate search for affordable housing opportunities	The CII Committee has identified affordable housing as its top priority. Loans to nonprofits is a growing part of the portfolio.	
Advocacy	Continue to represent CFMC (both on business model and mission delivery) at all governmental/policy levels. (CEO sits on LCCF public policy committee and the steering committee for the Community Foundation Awareness Initiative, a national advocacy group).	
Continue CEO engagement with nonprofit leaders to make sure CFMC is meeting community need.	Foundations of all kinds can become insular. It is important we always stay connected.	

Organizational Excellence

Organizational Excellence		
Goal	Process	2023 Result
Continued engagement of DEI work group and implementation of values in policies and mission delivery.	a. DEI training at the board retreat b. Build on new DAF policy restricting grants to hate <u>groups</u> c. If board/staff DEI work group feels it useful, develop organizational DEI statement	
Continued attention to diversity staff and board development.	Governance committee continue to prioritize diversity in many forms in nominating.	
Integration of systems upgrades that came from work with consultant in 2021	Will be led by SVP Christine Dawson and DOO Maria Hauman	
Successful implementation of new <u>data base</u> . Vendors have been selected.	A staff-wide effort being led by the Director of Operations.	
Successful implementation of new banking relationship with First Capital. Bank RFP was conducted in 2022.	Early meetings have already occurred. New relationship should be in place during Q2.	
Renewed focus on staff development, including the broader work of the CFMC.	2023 will see the return of COF community foundation conference. New staff being enrolled in CF training.	
Orientation of board into the broader work of the CFMC as it grows in complexity. (Includes sharing what is learned by CEO on COF National Advisory Committee, DAF research focus group, LCCF DEI committee, CFAI steering committee and LCCF public policy committee.)	Send new board members to CF fundamentals course. Utilize president's updates and segments of board meetings for learning opportunities.	
Continued mentoring of Senior Vice President as part of best practice in succession planning.	SVP needs to be able to step in should the Pres/CEO not be available.	
Big Picture	Process	2023 Result
Adapting to changing and growing <u>need</u> while building organizational capacity.	As Sue Parris, our DEI trainer stated, <i>we are her community foundation</i> . It is vital that the CFMC <u>stay</u> attuned to need as it develops in Monterey County (such as the Storm Relief Fund). Our community is counting on it.	

Feedback?
Questions? Comments?

