

President's Message Responding to Community Need

The Community Foundation for Monterey County (CFMC) has a long history of responding to urgent community need. In the past several years we've created funds in support of fires and the Pfeiffer Bridge closure in Big Sur. Now we're facing something entirely different.

Typically, disasters are defined by scope and time, and damage is known almost immediately. COVID-19 presents a different set of challenges. As of this writing, we're coping with the economic fallout of an impending public health crisis. Very shortly the "impending" may get dropped, and the public health aspects may be as urgent as the impact on the local economy. We have no estimation on the scale or duration of this emergency.

In this environment, community philanthropy remains paramount. Nonprofits are on the front lines, assisting individuals and families who face severe hardship. Nonprofits themselves face an uncertain future, as

“In this environment, community philanthropy remains paramount. Nonprofits are on the front lines, assisting individuals and families who face severe hardship.”

— Dan Baldwin, CFMC President/CEO



COVID-19 Relief Fund



for Monterey County
cfmco.org/COVIDRelief
100% of gifts go to grantmaking

fundraisers are cancelled, revenue streams dry up, or work is stalled as we shelter in place.

The CFMC, in partnership with the Monterey Peninsula Foundation, created the COVID-19 Relief Fund to support nonprofits helping those affected by the impact of the virus in Monterey County.

The fund addresses the immediate and longer-term needs of our region's most vulnerable residents, and seeks to support nonprofits as they struggle to stay afloat. \$550,000 in grants were made in the fund's first 10 days.

continued on page 3

Here for Good 75 Years of Impact

As this newsletter was going to print, the lead story was our 75th anniversary. Though our world may have changed due to the Coronavirus, the purpose of the foundation - to meet the needs of our community - has not. This added perspective shows that the foundation was then and continues to be, "Here for Good."

A major anniversary is a milestone. It inspires reflection on the past and an opportunity to look towards the future. The "Monterey Foundation," originally incorporated March 26, 1945, has evolved over the last 75 years to become the organization it is today - the Community Foundation for Monterey County.

continued on page 2



CFMC staff at Casa Abrego, one of the historic adobes the foundation helped save in the 1950s

More than \$500,000 granted for Census 2020

Preparation for the 2020 United States Census is intensifying in Monterey County with the CFMC funding efforts to educate communities about the importance of participating.

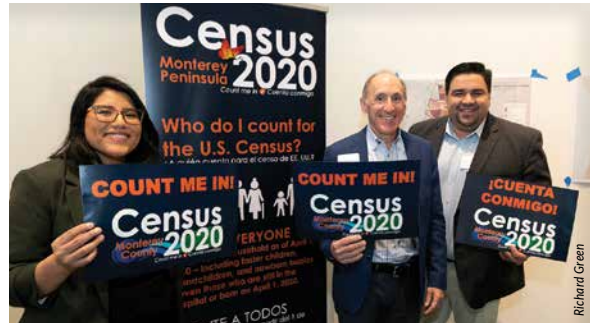
The CFMC has granted \$508,650 to 19 local nonprofit organizations doing grassroots work to encourage hard to count communities to participate in the upcoming census.

Funding was made possible by the State of California, Sunlight Giving, The Blue Shield Foundation, The Claire Giannini Fund, The California Endowment, Monterey Peninsula Foundation, The Siembra Latinos Fund of the CFMC and CFMC donor advisors.



“The Siembra Latinos Fund is proud to play a part in helping Monterey County get the resources it needs to serve all residents.”

— Ida Lopez Chan, Siembra Latinos Fund Advisory Board chair and CFMC board member



The CFMC is helping groups achieve an accurate count for Census 2020. (l to r) Erika Matadamas, Dan Baldwin, Supervisor Chris Lopez

“With COVID-19 affecting response rates, participation matters more than ever,” said CFMC Program Officer Erika Matadamas.

The CFMC has played a lead role as a funder, convener and source of information for nonprofits. See the grantees at cfmco.org/Census2020. Participate in the Census at 2020Census.gov.

Here for Good (from page 1)



In its early days, the foundation helped preserve Jacks Peak and other open spaces

The 32 visionary men and women who met in the Old Custom House on a Monday afternoon to establish “a responsible agency through which public spirited benefactors may contribute to funds” created a

powerful legacy. They included Pebble Beach Co. founder S.F.B. Morse, philanthropist Margaret Jacks, Presidio Commandant Col. Roger S. Fitch, Monterey Mayor Carmel Martin, Sr., painter Armin Hansen, designer Francis Elkins and poet Robinson Jeffers. Thanks to these early founders, the CFMC continues to inspire philanthropy and strengthen communities.

Preserving History and Open Space

The foundation was established to preserve historic adobes under threat of post-war development. The organization first purchased Casa Gutierrez for preservation and restoration. Fremont Adobe and Casa Abrego followed. In the 1960s the scope broadened to include “general charitable, educational, philanthropic, cultural and benevolent purposes.”

In the 1970s the group expanded its work to include the preservation of select parcels of open space, including California’s First Theatre garden, the top of Jacks Peak, S.F.B. Morse Cypress Grove and Pescadero Point to save these properties for future generations.

Expanding Impact

In the 1980s the board began the process of building permanent endowments to benefit the full range of community needs and hired its first Executive Director, Todd Leuders.

With an endowment of \$1 million, the organization changed its name to the “Community Foundation for Monterey County” in 1984, opened a Salinas office and broadened grantmaking countywide. The CFMC is one of 800 community foundations nationally. It is now in the top 100 of the 800 community foundations in the country in asset size, with more than \$300 million in charitable assets.

The Spirit of Local Philanthropy

The CFMC reflects the spirit of local philanthropy. A record \$19.2 million was granted in 2019, and more than \$205 million has been granted cumulatively through 2019.

The foundation also engages in community leadership work, bringing organizations together around issues such as the 2020 Census, affordable housing, homelessness and disaster relief, such as the Soberanes Fire and the Coronavirus. (See page 1).

The CFMC will continue its vision of “healthy, safe, vibrant communities” through **The Fund for Monterey County**, an endowed fund to meet important community needs in our county as they change over time.

Through careful stewardship of the philanthropic resources entrusted to us, thoughtful planned gifts from our Legacy Society members, strong grantmaking and community leadership, we will continue to be *Here for Good*. Our founders would be proud.

Responding to Community Need (from page 1)



COVID-19 Relief grant helps meet demand at Veteran's Transition Center food pantry

We've seen a remarkable response, as CFMC fund holders, private foundations, corporations, service clubs and individuals have contributed to the COVID-19 Relief Fund.

These contributions, combined with the utilization of CFMC discretionary assets, have pushed the fund's total to \$1.6

million. More will be needed as we work to provide support going forward. As with all our disaster funds, 100% of donations will be used for grantmaking.

Typically, disaster relief funds are comprised of gifts given by the unaffected to those in harm's way. With COVID-19, everyone is impacted, but at different levels. Monterey County is a remarkably generous community, neighbor helping neighbor. This will need to continue.

While government officials and businesses are taking appropriate, sweeping measures to halt the spread of the coronavirus by closing schools, delaying travel, cancelling events and having people shelter in place, these measures are disrupting lives physically, socially and economically.

“By engaging philanthropy during times of uncertainty, we can come together to respond to the evolving needs of our diverse communities.”

— Dan Baldwin, President/CEO

More than \$960,000 Granted for Coronavirus Relief

The COVID-19 Relief Fund has granted more than \$785,000 to 30 organizations with a focus on directly assisting those in need including families, seniors and the homeless. CFMC Donor advisors have granted an additional \$178,000 directly to local agencies. COVID-19 Relief Fund grantees to date include:

- Breast Cancer Assistance League • California Rural Legal Assistance
- Castroville Coalition • Catholic Charities • Central Coast VNA & Hospice • Coastal Kids Home Care • Food Bank for Monterey County
- Franciscan Workers of Junipero Serra • Jacob's Heart Children's Cancer Support Services • Mee Memorial Hospital • Natividad Medical Foundation • Outreach Unlimited • Salvation Army, Monterey Peninsula and Salinas Corps • St. Vincent de Paul Society, Sacred Heart Parish • Sun Street Centers • The Marina Foundation
- Veterans Transition Center • YWCA of Monterey County

See the full list or apply at: cfmco.org/CovidGrants.

How to Give:

- Make a secure online tax-deductible donation at cfmco.org/CovidRelief
- Mail a check to:
Community Foundation for Monterey County
2354 Garden Road, Monterey, CA 93940
with “COVID-19 Relief Fund” in the memo
- Call 831.375.9712 Mon–Fri, 8:30 a.m. to 5 p.m.
- Contact Christine Dawson at christine@cfmco.org for gifts of stock. Tax Identification #94-1615897



SMCF grant to Portola Butler High School gave students robot kits for STEM education

Southern Monterey County Foundation Creating Opportunity

The Southern Monterey County Foundation (SMCF) granted \$27,900 to 19 nonprofit organizations in 2019 for projects and programs serving the residents of King City and points south. They have also recently granted to the COVID-19 Relief Fund to help those affected by the virus in Southern Monterey County.

To date, \$121,500 has been granted from the SMCF for organizations providing community-based services aimed at improving the quality of life for Southern Monterey County residents. The SMCF, now in its sixth year, is an affiliate fund of the Community Foundation for Monterey County. See full list of grantees at cfmco.org/SMCFGrants2019.

“There is great need in King City and our surrounding area. Our community pulls together though the Southern Monterey County Foundation to create opportunities that might not otherwise happen. We are grateful, it's making a tremendous impact.”

— Jamie Jones, Southern Monterey County Foundation Board Chair



Leslie Mulford has always had philanthropy in her life, but she just didn't call it by that name.

“The instinct in me has always been to do small things for people who need it. – Leslie Mulford”

She moved on from her first love as a high school German teacher, to a business career in law and investments at a major insurance company, where she worked until retiring as vice president in 1997, before coming full circle to a career as a professional translator of German.

A generous profit-sharing program allowed her to save for retirement – which she is now enjoying – and offered her a way to give back to the community. She used a charitable distribution from her IRA to create the Leslie Mulford Fund, a field of interest fund of the Community Foundation for Monterey County. This type of fund allows the donor to give to areas of interest, rather than designating specific nonprofits.

Using an IRA for Giving – IRA QCD

When Leslie reached the age of 70½ she was required to withdraw the Minimum Distribution (RMD) from her IRA. She learned she could make an IRA Qualified Charitable Distribution (QCD) to satisfy part of her RMD.* By directing part of her IRA to the Community Foundation, she was not taxed on the withdrawal, and received the benefit of lower taxable income overall.

Grants from her field of interest fund will benefit at risk youth, elderly services, music in schools, literacy and disaster relief. Read her story: cfmco.org/Mulford.

*Gifts to donor advised funds are not eligible. Learn more at cfmco.org/IRA.

The Setting Every Community Up for Retirement Enhancement Act of 2019 (SECURE Act) became law on December 20, 2019. If you reach age 70½ in 2020 or later you must take your first RMD by April 1 of the year after you reach 72.

Legacy Society Luncheon Held

The CFMC hosted the annual Legacy Society Luncheon at the Monterey Plaza Hotel in February. The luncheon honors those who have included the CFMC in their estate plans by directing support to the causes that are most meaningful to them.



(l to r) Christine Dawson, Steve and Barbara Brooks, Birt Johnson, Jr. and Dan Baldwin at the Legacy Luncheon

Steve and Barbara Brooks shared their moving story of honoring neighbors through a planned gift. They donated rental property to create a charitable remainder trust. They will receive income for life, and, in the future, the remainder will create a fund and make grants to honor the legacy and friendship with their neighbors. Read more: cfmco.org/Brooks.

New Legacy Society Members:*

Steve and Barbara Brooks
Dr. William Donovan
Jason A. Donovan
Michael and Gloria Ipson
Eugene and Maya Rizzo

Laura Sinks
Elizabeth Stacey and
Wayne Peter Marien
Peter Hiller and Celeste Williams

New Funds Created*

The CFMC manages more than 550 funds established by individuals, families and businesses. For those who wish to establish or contribute to a fund, please visit cfmco.org/WaystoGive or contact Dan Baldwin or Christine Dawson at 831.375.9712 to learn more.

Affiliate Funds

Community Fund for Carmel Valley
Weston Call Fund for Big Sur

Agency Stewardship Fund

Carmel Valley Angel Project Stewardship Fund
Carmel Valley Manor Foundation Stewardship Fund

Donor Advised Funds

Carol and Don Hilburn Fund
Carol and Chuck Keller Family Fund
William R. and Duncan B. Lewis Family Foundation Fund
Struve Family Fund

Scholarship Funds

Belli Architectural Group Scholarship Fund
Gabilan Hope Scholarship Fund
Henry Hibino Memorial Scholarship Fund

*Since Nov. 2019

Monterey County Gave!

Monterey County Gives! raised \$5.4 million and engaged nearly 5,000 donors. The annual year-end giving campaign brings together donors with causes represented by 163 local nonprofits.

Participating nonprofits receive 100% of their donations, along with a pro rata match on the first \$75,000 raised. The impact has been tremendous. More than \$27 million has been raised and granted since 2009.

Here is the 2019 campaign's success by the numbers:

- \$5.4 million total donated
- \$3.66 million from individual donors
- \$528,240 overall matching fund
- \$1.2 million in organizational gift challenges
- 4,968 donors, \$310 average donation



Monterey County Gives! check presentation reception

MCCGIVES!

Monterey County Gives! is a special project of the Community Foundation for Monterey County, the Monterey County Weekly and the Monterey Peninsula Foundation. Thanks to Neumeier Poma Investment Counsel, Cannery Row Company, The David and Lucile Packard Foundation, the Colburn and Alana Jones Foundation of the CFMC, and our donor advisors for their generous support.

Adventure of Giving: Michael and Gloria Ipson

Michael Ipson, a Washington native raised in California, was attending U.C. Berkeley when he went to the Chinese University of Hong Kong as an exchange student. He met Gloria, a native of China, who was studying literature at the same campus. He proposed within seven months and they married the following year in Hong Kong. He and Gloria moved to the Central Coast in 2010.

Michael is the President of the Cal Alumni Club of Monterey County. The club has two scholarships for local students. The group moved the scholarships to the CFMC so donors could make tax deductible donations and take advantage of the CFMC's investment expertise and pooled portfolio. Michael was very pleased with how the CFMC handled the Larry Horan-Jim Langley and Jack Van Zander Scholarships, so he and Gloria turned to the CFMC when they wanted to create their own scholarship in 2019.



Michael and Gloria Ipson created a scholarship

Education and ties to the Salinas Valley run deep in Michael's family. His parents met at U.C. Berkeley, and his two brothers, sister in law, uncles, aunts, cousins, nephew and niece are all Cal alumni. His father Harold worked in Salinas in the 1930s. Michael's brother Dan was a Dean of Social Sciences and Humanities at Hartnell College. Dan's wife Sue taught elementary school in Salinas. Her father Lew Tully was a King City Union High School superintendent.

The families always made an effort to give back by helping local students pursue higher education. Michael and Gloria created the Ipson-Tully Memorial Scholarship in their honor, which focuses on students in the Salinas Valley. Read their story: cfmco.org/lpson.

“There are a lot of young people in Salinas who should have the opportunity to go to college.” — Michael Ipson



Scholarships

The CFMC manages more than 50 scholarships funds with a value of over \$8.2 million. Each year, these funds award over \$1.4 million for the benefit of about 375 students. See cfmco.org/Scholarships.

Center for Nonprofit Excellence Update

The 2019 LEAD (Leadership, Education and Development) Institute class celebrated with a graduation ceremony at the Osio Theatre in Monterey in December. 2020 marks the 10th cohort of the Community Foundation's LEAD Institute, with nearly 150 alumni now taking greater leadership roles in their organizations and communities. Through monthly seminars, on-the-job learning projects, leadership coaching and peer learning, LEAD supports the leadership and management growth of emerging nonprofit leaders from across the region.

The 2020 participants include: Helen Aldana, Santa Cruz Museum of Art and History; Emilio Barajas, The Diversity Center for Santa Cruz County; Stephanie Baron Lu, Positive Discipline Community Resources; Maria Barranco, Monarch Services; Rafael Cendejas and Laura Cuadros, Salud Para La Gente; Kimberly Garcia Contreras, YWCA of Watsonville; Elias Gonzales, MILPA Collective; Nicole Irigoyen, Monterey County Rape Crisis Center; Alexa Johnson, Housing Resource Center; Hana Kong, Monterey Peninsula Foundation; Sandra Peña, Interim Inc.; Tommy Pieper,



The 2019 Lead participants celebrate their graduation at the Osio Theatre



Osio Theater; Tenille Ramirez, Live Like Geno Foundation; José Sánchez, Greenfield Community Science Workshop; Karin Stratton, Monterey Bay Aquarium; Javier Tamayo, Alisal Center for the Fine Arts; Cheryl Tsuchiura, Independent Transportation Network Monterey County; and Kirstin van Gend, The Read to Me Project. Find program details at cfmco.org/LEAD.



Farewell and Thanks, Kaki Rusmore

Kaki Rusmore, Director, Center for Nonprofit Excellence, is leaving the CFMC May 1 after more than 15 years to focus on consulting and training. She has strengthened hundreds of organizations with support, innovative program design, consulting and leadership training through the years.

Highlights of her career at the CFMC include the design and facilitation of the LEAD Institute, creation of multiple programs combining grantmaking and capacity building for greater organizational impact and sustainability, and several enduring resources for nonprofit organizations and boards. We thank Kaki for her expertise and commitment to helping our local nonprofits thrive. She is looking forward to supporting leaders and organizations in her new role as they build communities where equity, caring, justice, sustainability and every individual can flourish.



Find results and information at cfmco.org/NonprofitSurvey.

Nonprofit Survey Results

Center for Nonprofit Excellence 2019 Survey respondents reflected on changes in their nonprofits and desires for future change. The 162 participants reported improvements in 84% of their organizational and personal abilities. CNE services made a difference, especially in these three areas: recruiting and retaining necessary staff and volunteers, accessing funding to support organizational improvements, and ability to raise stable funds from diverse sources.

2020 Workshops and Training

CNE's programming for 2020 will incorporate the results and include topics such as fundraising, working with consultants, and diversity, equity and inclusion. Register for networking opportunities and workshops, including many COVID-19 topics, at cfmco.org/Workshops.



Per Charles' wishes, the sale of his beloved estate created a fund that will benefit his chosen nonprofit organizations in perpetuity

“We're honored Charles entrusted us with this extraordinary gift. We're so pleased we were able to take a complicated asset and transform it into a fund that will forever support the causes he cared about.” – Dan Baldwin

Record Estate Gift

When Charles de Guigné passed away he left his beloved one-of-a-kind estate at 3200 17-Mile Drive in Pebble Beach to create a charitable legacy. It was the largest gift ever received by the CFMC and will have a lasting impact.

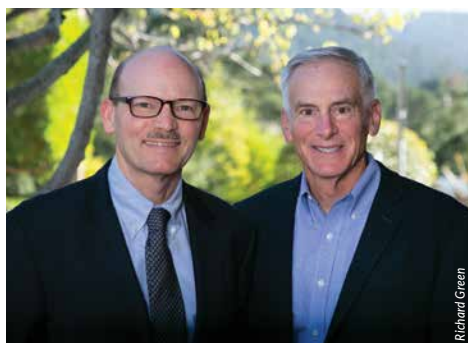
Charles, who had no children, wanted his property to be used for a philanthropic purpose. He specified through his trust that upon his death, title to the home be transferred to the CFMC. He instructed the foundation to sell the property so proceeds could be used to benefit his charitable interests.

Per Charles' wishes, the Charles August de Guigné Charitable Foundation, an endowed fund of the CFMC, has been created from the proceeds of the sale. This \$18 million fund will benefit the SPCA for Monterey County and Montage Health Foundation.

As an endowed fund, the principal remains invested and a percentage is paid out annually in perpetuity. Thanks to Charles' careful planning and generous gift, he has truly left a remarkable legacy.

CFMC Adds Gafill, Pezzini to Board

The Community Foundation for Monterey County is pleased to announce the addition of Kirk Gafill and Joe Pezzini to its 2020 Board of Directors.



Kirk Gafill and Joe Pezzini

“I am honored to join the Board of Directors. I'm eager to learn more about the challenges communities throughout Monterey County face and to support the foundation's mission to engage and address these needs through philanthropy and community support.”

—Kirk Gafill

Kirk Gafill, a native of Big Sur, is President/CFO of Nepenthe/Phoenix Corporation, a family business. He worked his way up from dishwashing to the helm of Nepenthe restaurant, founded by his grandparents. Kirk graduated from the University California, Los Angeles with honors with a degree in economics. He is president of the Big Sur Chamber of Commerce, board member of the Monterey County Visitors and Convention Bureau and is Co-Race Director for the Big Sur River Run. Other board service has included the Big Sur Land Trust and the Carmel Chapter of the American Red Cross.

Joe Pezzini is from a third-generation Salinas farming family and CEO of Castroville-based Ocean Mist Farms. He is a Hartnell Community College alumnus, UC Davis graduate and has an MBA from the University of Santa Clara. He began his career with the Ocean Mist Farms group of companies in 1983 as a farm manager. He became the Chief Operating Officer of Ocean Mist Farms in 2009 and was appointed to the CEO role in 2015. He has served on many agriculture industry boards. “I am honored to join an organization that works to reach all corners of Monterey County, making it a stronger community,” he said.

Birt Johnson, Jr., *Chair*
Teri Belli, *Vice Chair*
Jan Vanderbilt, CPA, *Treasurer*
Maija West, *Secretary*

Betsy Buchalter Adler
José Luis Alvarado
Ida López Chan
Kirk Gafill
Elsa Mendoza Jimenez
Nolan Kennedy
Giff Lehman
Fred Meurer
Erica Padilla-Chávez
Betsey Pearson
Joe Pezzini
Michael Reid
Bill Sharpe
Loren Steck
Abby Taylor-Silva

Daniel R. Baldwin, President/CEO

Though CFMC offices are temporarily closed to the public, staff is working remotely and can be reached by phone or email at cfmco.org/Staff.



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2354 Garden Road
Monterey, CA 93940
831.375.9712

Salinas Office
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Inside

COVID-19 Relief Fund Created
75 Years of Impact
Census 2020 Grants
Grantee and Donor Stories



75
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HEALTHY, SAFE, VIBRANT Communities



The Siembra Latinos Fund inspires philanthropy by Latinos for Latinos. Advisory Board member Blanca Zarazua (l) spoke at a recent event hosted at Taste of the Pinnacles in Soledad. Visit cfmco.org/Siembra.

COVID-19 Relief Fund and Resources

At press time the impact of COVID-19 in our area is unfolding. Please visit cfmco.org/CovidResponse for information and resources or cfmco.org/CovidRelief to give.

women's fund

of the community foundation
for monterey county

15th Annual

Women's Fund Luncheon

Changing Lives of Women & Girls

Postponed

The Women's Fund Luncheon has been postponed from its original date of May 12, 2020. Please check email or cfmco.org/womensfund for new date.

with Keynote Speaker

Noni Allwood

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Tickets: womensfund2020.eventbrite.com

Save the date



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75th Anniversary Celebration

Join us as we celebrate the power and impact of
local philanthropy.

Friday, October 23, 2020
Monterey Conference Center

Impact Sponsor:



Tickets: CommunityFoundation75.eventbrite.com

Sponsorship Information:

Mackenzie Little (831) 375.9712 x141
or mackenzie@cfmco.org