



Growing **GIVING**

Growing **IMPACT**

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### **MISSION**

**TO INSPIRE  
PHILANTHROPY  
AND BE A CATALYST  
FOR STRENGTHENING  
COMMUNITIES  
THROUGHOUT  
MONTEREY COUNTY**

### **VISION**

**HEALTHY, SAFE,  
VIBRANT COMMUNITIES**

*Cover: The Big Sur Land Trust and its partners are engaging community members to co-create the vision for Carr Lake open space in Salinas*



(l to r) Birt Johnson, Jr., Dan Baldwin

Richard Green

## Message to the Community

2019 completed the Community Foundation for Monterey County (CFMC)'s 74th year. It included a record \$19 million in grants, many generous gifts and the sale of a remarkable property in Pebble Beach that created our largest fund. Affiliate funds were started that will support Big Sur and Carmel Valley. Adding to our affiliates in southern and northern Monterey County, they emphasize the importance of local leadership and place-based philanthropy. The Community Impact Investment Committee approved a third placement of funds that will provide loan capital to immigrant-owned businesses. The Center for Nonprofit Excellence found new ways of strengthening our nonprofit partners.

By all accounts it was one of the best years in the CFMC's long history, and it served as the perfect springboard into 2020 and the celebration of our 75th anniversary.

In late December we began hearing about a new virus. By February we were getting a sense that our world would be changing. In mid-March we entered the era of shelter-in-place. While at this writing the local public health crisis has yet to reach predicted levels, the economic fallout has been devastating. We are trying to navigate in uncharted waters, with no clear sense of how long the journey will last.

Typically, annual reports celebrate a 12-month block of time. Any breaking news after January 1 can wait until next year's report. We intuitively know this is arbitrary, but as 2019 transitioned into 2020 it became glaringly so. We responded by including a special section on the COVID-19 Relief Fund. We live and work in a continuum. Community foundations are good object lessons. We hold endowments that provide support for generations. Our motto, "Here for Good," speaks to trust and stewardship, the impacts we strive to create and our ability to do it year after year. The nonprofits we support are feeding the hungry, sheltering the homeless, protecting our land and sea, and presenting art, music and dance.

Never has the Community Foundation for Monterey County felt more vital. Staying disciplined yet entrepreneurial in good times, nimble and responsive in difficult times, we provide critical resources to help sustain the nonprofit services that have become the lifeblood of our community.

On behalf of the Board of Directors and staff of the CFMC, we hope you enjoy this annual report, and know that it is our privilege to be of service.

Birt Johnson, Jr.  
2019/2020 Chair, Board of Directors

Daniel R. Baldwin  
President/CEO





**“Working with people to help them make an impact through their giving is incredibly meaningful.”**

- Christine Dawson, Vice President of Philanthropic Services





*Grantee Orchestra in the Schools creates opportunities for young musicians to build confidence*

## Growing Giving, Growing Impact

Grantmaking creates impact. Impact attracts resources. Resources fuel grantmaking. The Community Foundation for Monterey County granted \$19.2 million in 2019, and more than \$205 million since 1981. Those numbers translate into key programs and services for hundreds of nonprofits that sustain and enhance the quality of life in Monterey County.

Grants support grassroots groups, small nonprofits and more established organizations that provide enriching cultural experiences, after-school sports and science workshops, care for children with cancer, legal services and meals for seniors, access to nature for youth and other experiences that many of us take for granted. Nonprofits are able to better fulfill their missions both through the grants they receive and resources offered by the CFMC's Center for Nonprofit Excellence.

Many donors choose the CFMC as their philanthropic partner because of the impact they see. Funds are established by individuals, families and businesses who work with us in their lifetime or through their estates to benefit a wide variety of causes. The foundation grows giving by engaging with our donors through programs and services including educational events, grantmaking opportunities, family philanthropy and more. Connecting with our donors to help facilitate their giving and support their passions is at the center of our work.

The CFMC seeks to make philanthropy accessible to everyone. Donors can make gifts of all sizes to any fund. A donor advised fund can be created with a gift of \$5,000. People can contribute in any amount through the annual Monterey County Gives! campaign, a partnership with the Monterey County Weekly and Monterey Peninsula Foundation that benefits more than 160 local nonprofits.

The foundation also grows giving by thoughtfully investing and stewarding the philanthropic resources entrusted to us. This sustains grantmaking capacity for the future. More recently we have made Community Impact investments, which deploy a portion of CFMC's investment dollars to address local issues, while bringing a competitive return to the portfolio.

The CFMC also makes a positive difference through community leadership. Whether it's engaging in work around affordable housing or homelessness, relief from fires or the coronavirus, the CFMC aims to realize a vision of "Healthy, Safe, Vibrant communities."





*Ted Balestreri, Bradley Zeve, Steve John, Dan Baldwin*



*Dan Baldwin and Ida Lopez Chan*



*Monterey County Gives! participating nonprofits*



*Marcia Perry and Bradley Zeve*



*Check presentation reception at Monterey County Weekly*

**"The Community Foundation for Monterey County has the pleasure and honor of working with many people who use philanthropy to invest in the people of Monterey County. We have a front row seat to witness the generosity that exists in our community."**

**- Dan Baldwin, President/CEO**





CFMC staff celebrates success of Monterey County Gives!

## Monterey County Gives!

Monterey County Gives! is a year-end giving campaign that encourages donors of all ages to support their favorite nonprofits. Participating nonprofits receive a pro-rata match on the first \$75,000 donated to their organization.

More people gave to 2019 Monterey County Gives! than ever before. The campaign moved close to 5,000 donors to support the 163 participating nonprofits, raising more than \$5.4 million.

The program has provided funds for children to attend the symphony or paid for instruments for youth to create music of their own. Grants have backed programs to empower youth to address the impact of climate change, funded care for animals, supported arts education and provided critical health and human services for many local residents.

A special award from the CFMC goes to the nonprofit with the most donors aged 18-35. The goal is to jumpstart vital lifelong partnerships between younger donors and the local nonprofit community. Additional awards are presented for ingenuity, largest number of donors, and leadership impacting women, children, families, education and/or the arts (the Florence Haspel Zeve Award).

Since its founding in 2000, Monterey County Gives! has raised and granted more than \$27 million. Areas represented include Animals, Arts and Culture, Community and Social Service, Education and Youth, Environment and Sustainability and Health, Wellness and Food.

 [MontereyCountyGives.com](https://MontereyCountyGives.com)

**\$5,400,530**  
total donated

**\$3,655,859**  
from individuals

**\$528,240**  
matching fund

**\$1.2 million**  
in challenge gifts

**4,968**  
total donors



Monterey County Gives! is a special project fund of the Community Foundation for Monterey County in partnership with the Monterey County Weekly and the Monterey Peninsula Foundation. Other major partners include the Neumeier Poma Investment Counsel, the David and Lucile Packard Foundation, Colburn and Alana Jones Foundation of the CFMC and the Cannery Row Company. In addition to the major partners, 11 CFMC Donor Advisors sponsored the overall matching fund.



*Andy and Steffanie Smith talk about giving with CFMC Senior Philanthropic Services Officer Brian Thayer*

Richard Green

## Engaging Our Donors

The CFMC works closely with donors to help them achieve their philanthropic vision. A team member meets with each individual or couple to talk about what drives their giving and helps formulate plans to best accomplish their philanthropic goals. More and more donors want to share the joy of giving with their children and grandchildren, and the CFMC facilitates meetings with family members to encourage multi-generational participation.

Fund holders can reach out to the foundation for information about specific community needs, or about nonprofits located close to home, throughout the country or internationally. The CFMC Philanthropic Services team researches interest areas and presents a wide range of options and ideas. Staff can also arrange local site visits so donors can see and learn first-hand the important work being done in our county.

Twice a year the CFMC sends donor advisors a summary of applications received through the competitive grantmaking program. This summary lets them know more about the variety of programs and services offered by local nonprofits. Fund holders are invited to co-invest in these Community Impact grants, so together we can improve the quality of life in our communities. "We appreciate the Community Foundation's ideas and giving opportunities. We're able to research organizations and ask questions, so we feel like we are more thoughtful," says Steffanie Smith, a CFMC donor advised fund holder.

Our Philanthropy Education Series is a year-round program in which donors can learn about estate planning, family philanthropy, Community Foundation investments, and timely needs, such as the Census 2020 Fund or COVID-19 Relief. This is all part of the CFMC's partnership with our donors, and our commitment to be a trusted resource to enhance their philanthropy.

 [cfmco.org/Donors](https://cfmco.org/Donors)

**"We're part of a community that's been good to us. We've always felt giving back is the right thing to do."**

– Andy and Steffanie Smith, Andy and Steffanie Smith Fund of the CFMC





*Judge Lydia Villarreal (seated) was honored at the annual Celebration of Philanthropy*

## Celebrating Philanthropy

One of the best ways to grow giving is to share inspirational examples of people who contribute to improving the well-being of Monterey County residents. The CFMC's annual Celebration of Philanthropy thanks those who partner with the CFMC to invest in healthy, safe, vibrant communities.

Our Distinguished Trustee Award is presented each year to honor those who have demonstrated philanthropic leadership in Monterey County. CFMC Board Chair Birt Johnson, Jr. presented the award to Monterey County Superior Court Judge Lydia Villarreal in 2019 saying, "Judge Villarreal exemplifies community leadership and giving."

Judge Villarreal has been a champion for farmworkers' rights and an outstanding supporter of nonprofits advancing literacy, healthcare, public education and youth development. She co-founded the Center for Community Advocacy (CCA) in 1989, where she serves as board chair.

She spoke about philanthropy as a way to lift up future generations, both in education and socially, by being aware of the struggles of others and taking action. "The beauty of philanthropy is that it gives us an opportunity to do something about it," she said. "It's important that we wake up and do the right thing. Treat people with respect and do your best for everybody every day."

As award recipient, Judge Villarreal designated grants from the CFMC totaling \$10,000 to The Center for Community Advocacy, K.I.N.D (Kids in Need of Defense) and the Pacific Grove Museum of Natural History.

"While law can be a tool to help and defend people, we need networking to bring different people together to solve our problems. These problems are not just farmworker problems, but community problems," she said.

 [cfmco.org/Villarreal](https://cfmco.org/Villarreal)

**"Philanthropy is an expression of our hearts, our compassion, the best part of ourselves."**

– Judge Lydia Villarreal, 2019 CFMC Distinguished Trustee Recipient





*The gift of 3200 17-Mile Drive by Charles de Guigné created the largest fund in the CFMC's history*

*Grant Kinsey, courtesy Canning Properties Group*





*Charles de Guigné gifted his home to create charitable impact through his estate*

## Year of Real Estate

From condominiums and business properties throughout California and a strip mall in Hawaii, to a one-of-a-kind estate in Pebble Beach, the CFMC has transformed real estate assets into charitable impact. 2019 marked a rise in these gifts and a real estate bequest created the largest fund in the CFMC's history.

Charles de Guigné, who had no children, wanted his property to create a philanthropic legacy. He specified through his trust that upon his death, title to his estate on 17-Mile Drive be transferred to the CFMC. He instructed the foundation to sell the property so proceeds could be maximized for a charitable purpose.

Per Charles' wishes, the Charles August de Guigné Charitable Foundation was created from the \$18 million proceeds of the sale. As an endowed fund, the principal remains invested and a percentage is paid out annually. Charles selected the SPCA for Monterey County and Montage Health Foundation to benefit from the fund.

### Charitable Remainder Trusts

Several donors gifted their homes in 2019 to create Charitable Remainder Trusts (CRTs). A CRT offers donors income for life, and upon their death, creates an endowed fund to benefit the nonprofits of their choice. In one case, the donors now receive more income from the CRT created by the sale of their Carmel home, than they had received from renting the property.

### How it works

- \* Create a trust with the assistance of your professional advisor.
- \* Donate cash, appreciated stock, closely held stock, real estate or other assets into the trust.
- \* Avoid capital gains tax on the sale of the donated asset, and receive a charitable income tax deduction.
- \* Receive lifetime income for you and/or your named beneficiaries, a portion of which may be tax free.
- \* The "R" in CRT is the remainder. Upon your death, the remainder creates an endowed fund at the CFMC that benefits the causes or nonprofits of your choosing.

 [cfmco.org/CRT](https://cfmco.org/CRT)

**"We're honored Charles entrusted the CFMC 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, President/CEO



*Soledad Mayor Fred Ledesma welcomes guests at a Siembra Latinos Fund gathering*

## Siembra Latinos Fund

Giving is like a seed. It grows with encouragement. The Siembra Latinos Fund (SLF) is sowing seeds that will aid first-generation students' quests for education, provide healthcare for low income migrant families, help ensure an accurate count in the 2020 Census and create opportunities for Latinos in Monterey County.

The mission – "To inspire giving by Latinos for Latinos" – is being carried out by an advisory board made up of local leaders from education, small business, nonprofits and social justice. They engage the Latino community by example.

The Siembra Latinos Fund responds to the needs of the Latino community. They have the flexibility to create grantmaking priorities and are backed by the operational expertise of the CFMC. Funds raised have been granted to nonprofit organizations serving Monterey County Latino youth, seniors and families in a range of program areas.

In 2019, the SLF made preparing for the 2020 Census a priority by making a grant to support local organizations working on a fair and accurate count. Not having an accurate count carries major implications for proper funding of vital programs and services provided to Latinos in Monterey County. Many Siembra advisory board members also promoted the importance of the Census by participating in public service announcements in Spanish to help spread the word to hard-to-count areas.

 [cfmco.org/SLF](https://cfmco.org/SLF)



**"The Siembra Latinos Fund elevates the voices of Latinos in Monterey County and honors the power of collective giving to ensure the needs of Latino families are met."**

- Ida Lopez Chan, Chair, Siembra Latinos Fund Advisory Board



# Affiliate Funds

"Give Where You Live" is a concept that is alive and growing. It is thriving through CFMC affiliate funds that promote "place-based giving" in regions of Monterey County. The Northern and Southern Monterey County Foundations are going strong, and in 2019 discussions and planning started for Big Sur, Carmel Valley and Salinas Valley affiliate funds.



*The NMCF is guided by an advisory board of North County residents who have a deep understanding of needs in the region*

## Northern Monterey County Foundation

A group of community members attracted other donors and business leaders to launch the Northern Monterey County Foundation (NMCF) in 2016.

In 2019 the NMCF awarded \$34,000 in grants to 12 nonprofit organizations serving North County. Since its founding, it has granted \$94,000 to groups working to improve communities in the areas of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita.

"We need strong programs to benefit our neighbors," said Anne Herendeen, Chair of the NMCF Advisory Board. "It's inspiring to see people come together to help fund these important projects."

**\$34,000 granted**  
to 12 nonprofits

**\$94,000 granted**  
since 2016

 [cfmco.org/NMCF](https://cfmco.org/NMCF)



*The Southern Monterey County Foundation makes grants from King City to points south*

## Southern Monterey County Foundation

Southern Monterey County nonprofits and the communities they support are benefiting from generous people who contribute to the Southern Monterey County Foundation (SMCF).

In 2019 support from individuals, families and businesses helped the SMCF grant \$27,900 to 19 nonprofit organizations providing a variety of services in King City and south.

"Our community pulls together to create opportunities that might not otherwise happen. We are grateful that we can do this, it's making a tremendous impact," said Jamie Jones, SMCF Advisory Board Chair.

**\$27,900 granted**  
to 19 nonprofits

**\$121,000 granted**  
since 2014

 [cfmco.org/SMCF](https://cfmco.org/SMCF)



*Marti and Steve Diamond are true partners in giving and living*



# Sharing Success

## Steve and Marti Diamond

Steve and Marti Diamond both started from humble beginnings. Steve left high school early and was able to attend college because at age 15 he was awarded an academic scholarship to Tulane. He earned a B.S. in theoretical mathematics and an M.D. followed by his internship in surgery and residency in psychiatry at Stanford Medical School. He ventured into commercial real estate which ultimately became his full-time career.

Marti, a native of El Salvador, began selling homemade tissue flowers to neighbors at age seven and was always independent. Her adventurous spirit was evident as she restored a 60-foot boat at her home in California after navigating it from Florida through the Panama Canal with her three young children. She turned her love of being on the water and natural hospitality into her charter business that included a fleet of four luxury dining yachts, two of which she commissioned and built.

Through a combination of intelligence, aptitude, passion and entrepreneurial spirit, they both grew thriving businesses in the San Francisco Bay area. They met through mutual friends and were social and business acquaintances before eventually "tying the knot" on one of Marti's yachts.

The Diamonds have a strong connection to Monterey County. Steve bought his first home in Carmel in the early 1970s. He built their current home 20 years ago. It has been their refuge over the years, most recently during shelter in place. "It just feels like home," says Steve. Theirs is a true partnership. They office together, attend Zoom meetings together, live and give together.

The couple started the Marti and Steve Diamond Charitable Foundation Fund at the CFMC in 2017. Their main area of interest is education.

Because Marti is Latina, they focus on Latino students. They have invested in College Futures Monterey County, a CFMC initiative combining scholarships and success services to give students the best opportunity to get into and through college.

"I could not afford to attend college full-time and relied on night classes for my education. It makes me happy to help in some way," shares Marti, who relishes following the students' progress.

"We're looking to support really talented young people who want to help others, not just themselves. A handful of young people can really change the world," Steve says.

They also grant to local nonprofits, including organizations working on the front lines of COVID-19, such as testing for first responders. They recently made a significant grant from their fund to U.C. San Francisco for Convalescent Plasma Treatment research for the coronavirus.

"Working with the CFMC has been a wonderful experience. I can read about organizations and call and ask for more details and research. We've even gone on site visits of organizations we're interested in," said Marti.

The Diamonds have a large blended family and are involving the next generation in their giving as they work with the CFMC to plan their legacy. They hope to inspire their children and grandchildren by example.

**"Giving adds another dimension to our life. We want to give people hope and opportunity that they wouldn't otherwise have."**

– Marti Diamond, Marti and Steve Diamond Charitable Foundation Fund



**"We are grateful to our donors, partners and nonprofit organizations for supporting our vision of healthy, safe, vibrant communities."**

- Laurel Lee-Alexander, Vice President of Grants and Programs





*Point Lobos Foundation protects Point Lobos State Natural Reserve to educate and inspire visitors and preserve its unique resources*

## Grantmaking

The primary way the CFMC grows its impact is by supporting nonprofits through grantmaking. The CFMC awarded record grants of \$19.2 million in 2019, and has awarded more than \$205 million since 1981. As a community foundation, we make grants in diverse areas to nonprofits doing great work in health and human services; children and youth development; arts; culture and historic preservation; community development; the environment and animal welfare; education and disaster relief.

The programs and organizations are as diverse and wide-ranging as Monterey County itself. Grants have supported education through Salvation Army Monterey Peninsula Corps' preschool program, expanded in-home nursing and therapy to children through Coastal Kids Home Care and increased outreach of advance care planning through Hospice Giving Foundation.

Grants have contributed to historic preservation through the restoration of the Carmel Mission Foundation's Downie Museum Basilica Forecourt, and increased access to information through Radio Bilingüe's programs in Spanish and Triqui. The Neighborhood Grants program awards small grants to make a big impact by boosting grassroots groups' ability to improve their communities.

Grants from field of interest funds focus on a specific area. For example the Fund for Homeless Women supported the Casa de Noche Buena in Seaside for women and families without shelter. The Jean P. Fitton Fund supported professional development and acknowledgement of K-12 public school teachers with grants to the Greenfield Community Science Workshop and Monterey County Office of Education's Teacher of the Year recognition program.

The Center for Nonprofit Excellence provided capacity building and strengthening programs for dozens of nonprofit leaders. The CFMC continued its multi-year program in partnership with The James Irvine Foundation to build civic engagement in Salinas with grants and professional mentoring support. And we are proud of the work of making higher education possible for students in need. CFMC scholarships and awards reached \$1.5 million to create opportunity for local students.

"The Community Foundation is committed to providing assistance to our neighbors, helping students achieve their goals of higher education, and guiding the community through challenging times," said Laurel Lee-Alexander, Vice President of Grants and Programs.

**\$19.2 million**  
granted

**\$205 million**  
since 1981

**749**  
grantees

 [cfmco.org/Grants](https://cfmco.org/Grants)

**Countywide**  
impact and beyond

## Grantee Snapshots



### Palenke Arts – Arts Education

Something vibrant happens when you step inside the Palenke Arts classroom at Martin Luther King Jr. School of the Arts in Seaside. Color hits you, beating drums resonate with your heartbeat and dancing children welcome you. “This is where art grows,” said Juan Sanchez, Executive Director.

2019 marked growth for Palenke Arts. A CFMC grant helped expand classes. More than 120 students participate in after-school arts ranging from bilingual chorus, jazz workshop, visual arts, hip hop dance, beginning piano, guitar, violin and drums. In addition to classes and workshops, Palenke Arts presented a monthly World Music and Jazz concert series which featured artists from the US, Morocco, Mexico (Veracruz and Oaxaca), Brazil, Nicaragua and Japan, culminating with the 4th Annual Palenke Arts Festival.

**\$13,000 granted**  
to 20 student programs

more than  
**120**  
students served



### Cesar Chavez Futbol Academy - Youth Soccer Program

Cesar Chavez Futbol Academy is raising the bar for competitive soccer and academics. It has provided over 500 youth from Salinas, Marina, Castroville and the Salinas Valley with the ability to play at no cost for five traveling teams and 12 weeks of bi-weekly clinics.

Student must submit regular academic reports to play and the academy provides access to tutoring, test preparation, financial aid and healthy lifestyle messaging. Players are supported in their efforts to apply for and attend college. Academy teams compete at the highest level associated with its affiliation with US Soccer, and players gain exposure to college recruiters and visit college campuses.

**\$15,000**  
granted

clinics for  
**500**  
youth





### Watsonville Wetlands Watch – Stewarding the Environment

Watsonville Wetlands Watch protects, restores and fosters an appreciation for the wetlands of the Pajaro Valley.

A \$25,000 grant supported the Wetlands Stewards, an after-school environmental education program that increases confidence to be outdoors and develop leaders and future environmental advocates for the protection and restoration of wetlands.

Through five education programs, more than 4,000 local students are exposed annually to the wetlands, which sustain over 250 species of birds, and 23 species of native plants and animals that are threatened, endangered, or of special concern. Participating schools included Ohlone Elementary, Hall District Elementary and Pajaro Middle School in North Monterey County.

**\$25,000 granted**

to serve 4,000 students a year

**75% of students**

report a deep sense of interconnection with nature and share their environmental knowledge with friends and family



### Montage Health Foundation – Prescribe Safe Program

An average of 130 Americans die daily from an opioid overdose, according to the Centers for Disease Control and Prevention. The Montage Health Foundation (MHF) works with some 20 organizations including law enforcement, pharmacists, dentists and local physicians to educate medical staff and the community about safe use of prescription medications and promote safe and effective pain management.

A \$5,000 grant to the Prescribe Safe Program helped fund a staff position to track trends, work with treatment center staff to create a local referral network and raise community awareness. Since 2014, Prescribe Safe has worked to increase awareness and ultimately reduce the number of opioid related deaths, overdose rates, overdose-related emergency department visits, and the number of prescriptions written for opiates.

**\$5,000 grant**

to track opioid prescribing trends, overdose incidence rates, use of emergency department resources for opioid-related services

works with more than  
**20 organizations**

## Grantee Snapshots



### **Big Sur Health Center – Supporting Healthcare Operations**

Between Carmel and Cambria, there is only one medical clinic for the nearly 2,000 residents and millions who visit California's dynamic coast. The Big Sur Health Center (BSHC) sees anyone – offering services on a sliding scale – providing preventive and routine to emergency services. Nearly a quarter of its clients are uninsured, including many underinsured hospitality workers. A \$35,000 grant was used for operating funds to pay for clinical staff salaries.

Big Sur's rugged hazardous coastline, extreme weather conditions, road closures and frequent large-scale fires underscore the critical need for BSHC services. During road closures and community disasters, BSHC maintains 24-hour on-call service, home welfare visits and coordination with local emergency teams.

serving the Big Sur coast  
for more than  
**40 years**

Serves approximately  
**1,200**  
residents, employees  
and visitors each year,  
with an average of 3,500 visits

only health care facility  
**for 100 miles**



### **Interim, Inc. - Housing for Mentally Ill**

Housing is at a premium in Monterey County. For those living with mental illness, finding and keeping shelter is part of their struggle. A \$25,000 grant to Interim, Inc. was used to help purchase and renovate five apartments in the 12-unit Catalyst Apartments in Salinas for very low-income adults with mental illness. Purchasing the property ensured the units remain much-needed affordable housing.

Along with a place to live, Interim, Inc. provides case management, transportation assistance, peer support, employment/education support and outreach services for adults with dual diagnoses (substance use and mental illness). Research indicates that affordable housing for adults with mental illness can reduce the public cost of providing emergency room care.

Founded in  
**1986**

**14 programs**  
including five residential  
programs, two treatment facilities  
and a day rehab program  
facility for people  
with mental illness

**\$25,000**  
granted





### Salud Para La Gente – for Children’s Dental Disease Prevention and Treatment Program

Access to dental care remains one of the greatest unmet needs among children, particularly low-income children, according to Watsonville-based Salud Para La Gente. A \$25,000 grant funded 10 school-based screenings for youth in Monterey County. It brought bilingual, culturally competent comprehensive dental screenings, education and treatment services to more than 1,200 students. Many were children of migrant farmworkers who have never accessed oral health care and experience high rates of dental disease.

For youth, early and ongoing access to preventive oral health services can lead to improved school attendance, better quality of life, and reduced financial and societal costs, according to a Surgeon General’s report. Salud opened its doors as a free clinic to serve the health needs of farmworkers. It now provides medical, dental, vision, and counseling to over 27,000 patients a year in Monterey, Santa Cruz and San Benito Counties.



### Gathering For Women – Expanding Capacity to Help Women Without Shelter

Monterey-based Gathering for Woman (GFW) has been serving homeless women in need of basic services since 2014. A \$35,000 grant helped GFW deliver key services including emergency assistance, data collection, salaries and occupancy and case management software. Services helped support 421 women with access to 53 service providers, case management navigators, medical/psychological care and enrichment activities.

According to the 2019 Monterey County Point-in-Time Homeless Census & Survey there are 2,422 homeless individuals in Monterey County of which 35 percent are female. Over half of GFW guests are over the age of 50 years old. The oldest is 92. The Day Center program offers bathroom and shower facilities, meals, computer stations and more.

Gathering for Women also received \$45,000 from the CFMC’s Fund for Homeless Women to expand case management services.

**\$25,000**  
granted

Served  
**1,200**  
low-income Latino youth

Services available  
**to all**  
regardless of ability to pay

**100%**  
housing services referrals by end of  
first Case Management visit

**15,491**  
meals provided

**1,398**  
case management visits







# Responding to Community Need

The entire world changed as COVID-19 spread infection and physical, psychological, emotional and economic damage. As Monterey County entered Shelter-in-Place it was rapidly clear the impact on residents, nonprofits and businesses was greater than anyone could have imagined.

The CFMC responded by creating the COVID-19 Relief Fund on March 16, 2020, in partnership with the Monterey Peninsula Foundation, to provide key funding for local nonprofits providing food, housing, mental health and other critical services. The fund has no fee, so 100% of contributions support nonprofits working with affected populations.

## Great Need: Strong Response

The need is great to ensure that those facing food insecurity and other hardships have places to turn for resources. Individual donors, CFMC fund holders, companies and private foundations responded. Through June 30, \$2,920,996 was contributed to the fund.

"We started by focusing on the front lines. We wanted agencies to have adequate resources as they deal directly with the people most affected," said Dan Baldwin, CFMC President/CEO.

## \$2.6 Million Awarded

As of June 30, 2020, the fund had granted \$2,659,862 in 112 grants to nonprofits serving vulnerable individuals and families with basic needs. Grants included:

- \$1.79 million to nonprofits providing food, housing assistance, direct financial assistance, supplies (diapers, wipes, baby food, personal protective equipment)
- \$861,255 to assist nonprofits experiencing staffing and/or volunteer gaps to support vulnerable populations. This includes providing emergency childcare to essential workers, adaption of programming for children with special needs, adapting programs to ensure the safety of the YWCA's domestic violence shelter, suicide prevention services, and educational outreach to the local indigenous communities about the pandemic.

## \$1 Million Community Impact Investment Loan

The CFMC also loaned \$1 million to Mission Economic Development Agency through its Community Impact Investment Program. It will enable the El Pajaro Community Development Corporation to make loans to small immigrant-owned businesses in Monterey County that were not eligible for assistance through the CARES Act.

## Philanthropic Partner

The CFMC was the partner of choice for the Monterey Peninsula Chamber of Commerce to create a relief fund for small businesses of 1-20 employees, the Carmel Gives Fund created by Tim Allen Realtors, the Feed the Homeless Fund created by Love Our Central Coast and employee relief funds created by the Club at Pasadera and Corral de Tierra Country Club.

Despite the strong philanthropic response to date, we know the health and economic wellbeing of many Monterey County residents are threatened, and nonprofits will need the resources to respond. The cost of extra precautions and services combined with decreased revenues will increase the strain on agencies providing meals to the elderly, aid to the homeless and other services.

"The CFMC's grantmaking expertise, community knowledge and trust have prepared us for the challenge of aiding our community in mitigating the unprecedented impact of COVID-19," said Dan Baldwin, President/CEO. "Our commitment to maximizing impact is unwavering. You put your trust in us and we are here to do our best for Monterey County."

## Give or Learn More

Donors can make a secure tax-deductible donation at [cfmco.org/CovidRelief](https://cfmco.org/CovidRelief), mail a check, contribute stock or make an IRA Qualified Charitable Distribution. Call 831.375.9712 or visit our website to see the full list of grantees and learn more.

*More than 100 agencies received COVID-19 Relief Fund grants (clockwise from top left) Community Human Services, Gateway Center, The Marina Foundation, Veterans Transition Center, Dorothy's Place, Central Coast YMCA Salinas, American Red Cross, Gathering for Women*



**“Not only did the scholarships help me financially, but they helped me feel relevant and important. I want to assure you that investing your money in motivated students like myself is definitely worth it. You are changing the lives of many people.”**

– Jesus Floriano-Ramirez, CFMC scholarship recipient and CSUMB student





CFMC Scholarships are helping Jesus Floriano-Ramirez fulfill his educational goals

## Creating Opportunity: Scholarships

Jesus Floriano-Ramirez is the first in his family to attend college. He commutes to California State University, Monterey Bay from his home in Soledad, past the nearby farm fields where his proud parents work.

“My parents have always taught me to do my best, work hard for what I want and never let anything get in the way of my success to have a better future,” says Jesus.

The drive to and from college is a daily reminder of how education is transforming his world. Jesus is one of more than 350 students who received scholarships from the CFMC in 2019. He received both a Raymond H. Costa Family Scholarship and College Futures Monterey County Scholarship.

College Futures Monterey County is an ambitious CFMC partnership with College Futures Foundation. It provides students with scholarships and required workshops to prepare for and succeed in college.

Education plays a vital role in a thriving economy and building healthy communities. CFMC scholarships have grown four-fold since 2015, topping \$1.5 million awarded to 363 promising Monterey County students in 2019.

“These dollars represent a recognition by our community that access to affordable, high quality education for everyone is critical to ensuring students reach their educational goals,” said Dan Baldwin, CFMC President/CEO.

The CFMC has 55 active scholarship funds, attracting companies ranging from Salinas-based agriculture giant Taylor Farms to service clubs and donors with specific interests, such as supporting the study of architecture, the children of farmworkers or working students. Funds are established by people who recognize the value of education and want to support students in achieving their full potential.

 [cfmco.org/Scholarships](https://cfmco.org/Scholarships)

55 active  
scholarship funds  
totaling  
**\$8.2 million**

**\$1,541,205**  
awarded

**363**  
scholarships

*Opposite Page: (Clockwise from top left) Yasmin Barrera Martinez, Margaret and Seba Bronson Scholarship recipient with Sebina Hobson, Drezner Family Scholarship recipient Priscilla Amao-Herrera and her daughter, R.J. Harper Memorial Scholarship recipient George McNeely (center), Whitney Grummon Memorial Scholarship recipient Naomi Hernandez-Ramirez with Shawn Parker, Taylor Farms Scholarship recipient and Bruce Taylor, Dan Baldwin, Jesus Floriano-Ramirez, Birt Johnson, Jr. and Christine Dawson*



*The annual Women's Fund Luncheon inspires giving and action*

Richard Green

## Empowering Women & Girls: Women's Fund

The Women's Fund provided pathways for women and girls to embrace their power and ability to reach for positions of leadership. In May, 2019 keynote speaker Julie Castro Abrams, founder of "How Women Lead," brought her inspiring message of empowerment to the Women's Fund luncheon.

"We are at a tipping point for women leading the world. Let's look up, see what others are doing and capture our momentum," said Castro Abrams, who spoke to nearly 600 women and men gathered to raise more than \$136,000 for grantmaking and scholarships.

Women's Fund Scholarship recipient Jessica Godinez shared her story of defying cultural norms to pursue her dreams. The Everett Alvarez High School graduate was involved in Girls' Health in Girls' Hands (GHGH), a Women's Fund-supported program to empower girls with leadership and advocacy skills.

"Your support has enlightened me in so many ways. I learned how to make a change, how to stand up for myself and others and how to be persistent to obtain my goals," said Godinez, who attends Hartnell College with hopes of one day attending medical school to become a neurosurgeon.

The Women's Fund produced and premiered "Creating Pathways," a powerful video about growing women leaders, investing in scholarships and educating about human trafficking through the nonprofit Rising International.

"We want to support local women and girls in leadership, policy and advocacy to address gaps in economic security and safety. This not only impacts their families but will also improve the quality of life for our entire community," said Christine Dawson, CFMC Vice President of Philanthropic Services. She pointed to the benefit of investing in women and girls, quoting Melinda Gates, "When we lift up women, we lift up humanity."

 [cfmco.org/WomensFund](https://cfmco.org/WomensFund)

**"I WANT TO TRANSFORM THE  
WAY WE SEE WOMEN LEADERS  
AND IT STARTS WITH US –  
SUPPORTING EACH OTHER,  
ELEVATING THE VOICES AND  
PERSPECTIVE OF WOMEN  
AROUND US."**

**–JULIE CASTRO ABRAMS  
CEO, HOW WOMEN LEAD**

Awarded **\$75,000** in scholarships to 39 girls

Supported **6 women** leaders  
to attend the Women's Policy Institute

Awarded **\$2.1 million** in grants (since 2003)





*Oralia Maceda, Co-Executive Director of Census Fund grantee, Centro Binacional para el Desarrollo Indígena Oaxaqueño (CBDIO) speaks at a Greenfield Census event.*

## Community Leadership and Census 2020

The CFMC has embraced its role as a community leader addressing problems such as affordable housing and homelessness in Monterey County. In 2019 the foundation played a key role in the grant allocation process to award \$12 million in HEAP (Homeless Emergency Aid Program) for several important projects. The foundation also helped highlight student homelessness by hosting a meeting about the Pivot Learning report which provided statewide data on the topic.

In 2019 the CFMC went to work preparing for an issue with long-ranging impact in a broad range of areas – the 2020 Census. The foundation rallied support to increase Census outreach and participation in Monterey County, which has been identified as a hard-to-count region. Thirty five percent of residents live in areas that did not respond to the last census. The CFMC played active roles as a convener, educator and funder to address this issue, creating the Census 2020 Fund.

Census Fund donors include: The State of California, The Blue Shield Foundation, The Claire Giannini Fund, The California Endowment, Monterey Peninsula Foundation, Sunlight Giving and the Siembra Latinos Fund of the CFMC. The CFMC held a donor education briefing which garnered additional support for the fund from CFMC donor advisors. Funds raised and granted exceeded \$500,000 and benefited 19 nonprofit organizations.

"The Community Foundation's support enabled us to hire a multilingual Census Community Worker, Jesus Estrada," said Reina Canale, California Rural Legal

Assistance Program Manager. "His ability to fluently speak Spanish, Triqui and Mixteco enabled him to be a trusted messenger to perform Census outreach to hard-to-count indigenous farmworkers," she added.

Despite setbacks from social distancing due to COVID-19, grantee organizations like the Center for Community Advocacy are actively working to ensure hard-to-count populations are educated about the importance of the 2020 Census.

In other areas, President/CEO Dan Baldwin chaired the League of California Community Foundation's Public Policy Committee and led efforts to educate lawmakers about donor advised funds and the good they do. Community Foundations often act as philanthropic "first responders." For example, in response to COVID-19, CFMC donor advisors increased their giving from March through May 278% over the same period in 2019. They granted \$3.25 million to the COVID Relief Fund and directly to nonprofits.

 [cfmco.org/Census2020](https://cfmco.org/Census2020)

**"A COMPLETE COUNT IS ESSENTIAL TO MANY ASPECTS OF LIFE, FROM THE ALLOCATION OF MILLIONS OF DOLLARS IN FEDERAL FUNDS FOR SCHOOLS, ROADS, HOUSING, HEALTH SERVICES, TO POLITICAL REPRESENTATION AND ECONOMIC DEVELOPMENT IMPACT FOR THE REGION."**  
- ERIKA MATADAMAS, PROGRAM OFFICER



*The Read to Me Project is one of several nonprofits that benefit from combining CNE offerings*

## Center for Nonprofit Excellence

Local nonprofits share a commitment to improving the communities we live in. The Center for Nonprofit Excellence (CNE) works with them as they strengthen their efforts. Organizations that take advantage of multiple offerings from CNE see even greater results.

For example, the Read to Me Project (RtMP), has made good use of CNE activities to grow and improve. RtMP helps children achieve kindergarten readiness by coaching 4th to 6th grade students to mentor and provide early literacy experiences to their young family members by reading to them at home. They offer parents information about brain development and ways to stimulate learning during the all-important first five years of life.

Their staff members have taken advantage of several CNE workshops including leadership and fund development. Their Program Manager is a participant in CNE's 2020 LEAD (Leadership Education and Development) Institute. And an Organizational Development grant helped them build a process to consistently gather and analyze data on program activities.

"One of my first tasks when I joined the team was to expand the number, diversity and skill set of our board of directors," says Libby McMahon, Executive Director, RtMP. "CNE's Board Recruitment Toolkit and Board Connect helped us find a wonderful new board member. With CNE's help, today's board is larger, younger, more representative, and brings a wider set of skills to the service of our agency."

CNE offers an array of services. In 2019, 23 of the 164 nonprofits that interacted with CNE used three or more services, combining different activities to increase their effectiveness. More than 50 Executive Directors participated in offerings to support resilient leaders.

 [cfmco.org/CNE](https://cfmco.org/CNE)

**164**  
nonprofits  
engaged  
with CNE

**23**  
organizations  
utilized 3 or more  
CNE services

**52**  
Executive Directors  
took advantage of  
offerings to support  
resilient leaders







*Gatherings for participants in The James Irvine Foundation regranting program offer peer learning and support*

## Increasing Civic Engagement

### The James Irvine Foundation Regranting Program

The CFMC continued to develop and implement the multi-year pilot regranting program of The James Irvine Foundation to strengthen nonprofit capacity and leadership in civic engagement and youth leadership. The goal is to expand economic and political opportunity for low-income Salinas residents.

Participating nonprofits (listed below) received \$342,495 in operating support in 2019, an organizational coach/mentor and took part in gatherings for peer learning and training. Grantees undertook an organizational self-assessment and set goals. Thanks to the coaching and grant funding, they then invested in staffing and professional development, strategic planning, program evaluation methods, fund development and sustainability.

**Baktun 12** is a collective of performance artists based in East Salinas. The group is dedicated to presenting the “rawest, realest Chicano-flavored” street theatre, poetry and hip-hop productions.

**Building Healthy Communities East Salinas** is a community-driven initiative, grounded in a strong local history of community advocacy and active partnerships between residents, private organizations, and public agencies.

**Center for Community Advocacy (CCA)** provides education, orientation and legal support to farmworkers and low-income working families who want to establish neighborhood committees that work to improve housing and health conditions.

**Ciclovia** (Spanish: “bike path”) provides a safe, inclusive environment where families can come together to enjoy accessible recreation, encourages healthy habits, promotes local businesses and fosters community-building.

**Communities Organized for Relational Power in Action (COPA)** develops the leadership skills of ordinary people to engage in public life, equipping them to help change the economic, social, political and cultural pressures on their families.

**The Epicenter** empowers at-risk and system-involved youth to flourish by connecting them to community resources that provide opportunities for equity and hope.

**Girls Inc. of the Central Coast** inspires all girls to be strong, smart, and bold™ and to respect themselves and the world around them.

**Monterey Bay Central Coast Labor Council** improves the lives of workers, their families, and our community to bring economic justice to the workplace and social justice to the nation.

**Motivating Individual Leadership for Public Advancement (MILPA Collective)** cultivates change makers for the next seven generations by improving the health and well-being of the most impacted communities.

**Mujeres en Accion** helps low-income women become economically self-sufficient and develop their leadership.



Fund holders Vicki and Bill Mitchell



Scholarship recipient Jessica Godinez speaks at the Women's Fund Luncheon



Artist Jose Ortiz (l) presents Judge Villarreal with portrait at the Celebration of Philanthropy

## Our Family of Funds

The CFMC holds more than 550 funds created by individuals, families and businesses. Funds can be established to benefit specific organizations, causes, geographic areas, scholarships or unrestricted to respond to changing needs. The CFMC is a steward of both the charitable assets entrusted to us and each donor's philanthropic vision.

### Affiliate Funds

A local advisory board provides oversight, defines grantmaking priorities, and raises funds to be distributed to community organizations serving a specific region.

Community Fund for Carmel Valley\*\*  
Northern Monterey County Foundation  
Southern Monterey County Foundation  
Weston Call Fund for Big Sur\*\*

### Agency Endowment Funds

Nonprofit agencies benefit from participation in the CFMC's investment pools and help with planned giving to grow their sustainability.

39 Craftsmen Fund for Monterey County Youth Museum  
All Saints' Day School  
All Saints' Day School Endowment Fund  
The Gloria S. Daly Endowment Fund for All Saints' Episcopal Day School  
Hester Hyde Griffin Fund for All Saints' Episcopal Day School  
Laurie Boone Hogen Appreciation Fund for Excellence in Elementary Education  
Bishop Kip Fund for All Saints' Episcopal Day School  
Alliance on Aging Endowment Fund  
Alzheimer's Association of Monterey County  
David Allen Bernahl II, Local Heroes Fund for CASA

Big Sur Health Center Endowment Fund  
The Big Sur Land Trust Conservation Fund  
Blind and Visually Impaired Center Fund  
Boys & Girls Clubs of Monterey County  
Carl Cherry Center for the Arts Fund  
Carmel Music Society Endowment Fund  
Carmel Public Library Foundation Fund  
Carmel Public Library Foundation - Children's Fund  
Carmel Woman's Club Scholarship Endowment Fund  
Carmel Woman's Club Fund  
Casa Amesti Foundation Building Endowment Fund  
Center for Photographic Art Fund  
Chamber Music Monterey Bay Fund  
Chartwell School Scholarship Endowment Fund  
Children's Services International Fund  
Community Partnership for Youth Fund  
Elkhorn Slough Foundation, Inc. Fund  
Fred Farr & Edwin Bliss Buckeye Memorial Fund  
Fenton Founders' Fund for Youth Music Monterey  
Food Bank for Monterey County Endowment Fund  
Foundation for Monterey County Free Libraries - General Endowment Fund  
Foundation for Monterey County Free Libraries - Dallas Shaffer Book Fund  
Monterey County Free Libraries - Staff Development Fund

Friends of the Carmel Valley Library Fund  
Friends of the Salvation Army Monterey Peninsula Fund  
Girl Scouts of California's Central Coast Endowment Fund  
Goodwill Industries of Santa Cruz, Monterey and San Luis Obispo Counties Fund  
Health Projects Center Fund  
Interim, Inc. Mental Illness Endowment Fund  
Kinship Center Fund  
Legal Services for Seniors Endowment Fund  
LULAC Council # 2055 Fund  
Lyceum Founders' Fund in Memory of Vera Hering and Claire Kennedy  
Meals on Wheels of the Monterey Peninsula Fund  
Eve Mills Memorial Fund for Meals on Wheels Salinas Valley  
Meals on Wheels of Salinas, Inc. Fund  
Monterey County Historical Society Fund  
Monterey History and Art Association Endowment Fund  
Monterey Public Library Fund  
Monterey Museum of Art Fund  
MPC Women Supporting Women Endowment Fund  
Museum Foundation of Pacific Grove Fund  
Natividad Medical Foundation Fund  
Danny Nugent Memorial Campership Fund  
Ombudsman for Long-Term Care Fund  
Jack O'Neill and Harry Hind Endowment Fund  
Operating Endowment Fund  
Orchestra in the Schools Endowment Fund

Nellie Irons Orr Scholarship Fund  
Pacific Repertory Theatre Endowment  
Project Helping Hand Fund  
Rancho Cielo Endowment Fund  
Salinas Rodeo Rotary Club Foundation Agency Endowment Fund 2  
Sylvia W. Schwarz Endowment for Reading Improvement at Tularcitos School  
Shelter Outreach Plus Fund  
SPCA of Monterey County Fund  
St. Timothy Foundation, Inc. Fund  
Sunset Theater Endowment Fund  
Robinson Jeffers Tor House Fund  
Tularcitos Parent Teacher Organization Fund  
Director Emeritus Richard Tyler Scholarship Award  
United Way of Monterey County Fund  
Ventana Trails Forever Fund  
Ventana Wilderness Alliance Fund  
Ventana Wildlife Society Fund  
Youth in Wilderness Fund  
The Western Stage Endowment Fund  
York School Fund

### Agency Stewardship Funds

Agencies benefit from participation in the CFMC's investment pools and retain access to the funds.

1984 Fund  
Big Sur Health Center Stewardship Fund  
Big Sur Land Trust Carmel River FREE Stewardship Fund





*Kaki Rusmore and Susie Polnaszek host Center for Nonprofit Excellence Board Connect*



*(l to r) Marty Wolf, Dan Baldwin, Mel Mason, Birt Johnson, Jr. at the Celebration of Philanthropy*



*Margo Mayfield, Coastal Kids Home Care speaks at Northern Monterey County Foundation reception*

Carmel Heritage Society Stewardship Fund  
**Carmel Valley Angel Project Stewardship Fund\***

Carmel Valley Kiwanis Foundation Stewardship Fund  
 Carmel Valley Manor Foundation Stewardship Fund\*\*  
 Carmel Woman's Club Stewardship Fund  
 CASA of Monterey County Stewardship Fund  
**CCVNA Stewardship Fund III - Long Term Restricted Investment Fund\***  
 Central Coast VNA and Hospice, Inc. Stewardship Fund  
 Stewardship Fund for the Center for Photographic Arts  
 Central Coast Center for Independent Living Stewardship Fund  
 Central Coast Veterans Cemetery Foundation Stewardship Fund  
 Chamber Music Monterey Bay Stewardship Fund  
 CHISPA Stewardship Fund  
 Church in the Forest Stewardship Fund  
 Community Human Services Stewardship Fund  
 Conservancy for the Range of the Condor  
 Del Monte Forest Conservancy Fund  
 Friends of Carmel Forest Stewardship Fund  
 Friends of Sunset Foundation Stewardship Fund  
 Friends of the Andy Ausonio Library Stewardship Fund

Friends of the Carmel Valley Library Stewardship Fund  
 Friends of the Marina Library Stewardship Fund  
 Girls Inc. Stewardship Fund  
 Harmony at Home Ending Violence & Building Families Stewardship Fund  
 Hartnell College Foundation Student Success Fund\*\*  
 International School of Monterey Foundation Stewardship Fund  
 Jacob's Heart Children's Cancer Support Services Stewardship Fund  
 Japanese American Citizens League of Monterey Peninsula Stewardship Fund  
 Kernes Adaptive Aquatics Stewardship Fund  
**Kinship Center Stewardship Fund\***  
 LandWatch Monterey County Stewardship Fund  
 Sun Street Centers' Anne C. Leach Scholarship Fund  
 Legal Services for Seniors Stewardship Fund  
 Meals on Wheels of the Salinas Valley Stewardship Fund  
 Methodist Foundation of Pacific Grove Stewardship Fund  
 Monterey County Pops Stewardship Fund  
 Museum Foundation of Pacific Grove Stewardship Fund  
 Operating Reserve Stewardship Fund  
 Park It! Stewardship Fund  
 Peace of Mind Dog Rescue Stewardship Fund

Pacific Grove Public Library Foundation Fund  
 Pacific Grove Public Library Fund for the Future  
 Rancho Cielo Youth Stewardship Fund  
 Monterey County Rape Crisis Center Stewardship Fund  
 Maury Richmond Scholarship Stewardship Fund  
 Salinas Valley Memorial Hospital Foundation Stewardship Fund  
 Learning Opportunities Endowment Fund for Scottish Fiddlers of California  
 Shelter Outreach Plus Stewardship Fund  
 Sarah Spencer Seed Money Fund for the Center for Photographic Art  
 Sun Street Centers Stewardship Fund  
 Temple Beth El Stewardship Fund  
 United Way Monterey County Stewardship Fund  
 United Way Monterey County Stewardship Fund II  
 United Way Monterey County Stewardship Fund III  
 Visiting Nurses Association and Hospice Stewardship Fund II  
 Central Coast Young Men's Christian Association Stewardship Fund  
 Youth Music Monterey Stewardship Fund

**Company Funds**  
 Businesses simplify their giving and receive tax advantages and customized

support to maximize their community philanthropy.

The Carmel Realty Foundation  
 Church Brothers-True Leaf Farms Scholarship Fund  
 Corral de Tierra Country Club Employee Emergency Assistance/Relief Fund\*\*  
 Mission Ranches Fund  
 Monterey Pacific Company Fund  
 Nepenthe/Phoenix Corporation Fund  
 The Club at Pasadera Employee Emergency Assistance/Relief Fund\*\*  
**The Club at Pasadera Scholarship Fund\***  
 Taylor Farms Scholarship Fund

**Designated Funds**  
 Donors can support a designated agency or agencies over time with a permanent, protected stream of operating income.

Pauline and John Anderson Fund  
 William S. and Janice R. Anderson Fund  
 Animal Legal Defense Fund\*\*  
 Arts Council for Monterey County Endowment Fund  
 Tony P. and Marjorie Ayres Fund  
 Nancy Parker Benham Endowment Fund  
 Central Coast Lighthouse Keepers Fund  
 Cislini Fund  
 Howard and Lynn Classen Endowment

**"The best thing about giving back, is that you are helping others to achieve their goals in life. There is no better feeling than knowing your gift will be supporting the things you value."**

- Marty Wolf, Martin R. Wolf Family Fund, Legacy Society Member



*Jaimie Jones, Brad Smith, Brinet Greenlee,  
Southern Monterey County Foundation reception*



*Siembra Latinos Fund Advisory Board Members  
Daniel Rodriguez and Blanca Zarazua*



*Marian Penn, Kathy Whilden and Michael Reid,  
co-founders Fund for Homeless Women*

Charles Auguste de Guigné  
Charitable Foundation  
Frances Elgan & Werner Kunkel  
Fund  
Howard W. and Elva M. Elliott  
Trust Fund  
The Herman Fletcher Fund  
A Fork in the Road-A Fund  
Providing a Path to a Science  
Career  
John Gill ALS Patient Support  
Fund  
Rodney & Betty Guilfoil Fund  
**The Edgar H. Haber and Terry  
Jones Haber Fund\***  
**Jack and Donna Hardy Fund\***  
The Hudson Fund  
Ward D. and Mary T. Ingram  
Fund  
Bob Jones Boy Scout Camping  
Fund  
The William Kiepora Fund  
Jack and Patricia Kilmartin Fund  
Sandy Loiacono Scholarship  
Fund  
John H. Marble Endowment  
Fund  
**MBD Fund\***  
Jane P. McKay Endowment  
Fund for the Big Sur Land  
Trust Fellowship Program  
Jane P. McKay Endowment  
Fund for Door to Hope  
Jane P. McKay Endowment  
Fund for the Hartnell College  
Foundation Counselors'  
Grants Program  
Monterey County Symphony  
Association Fund  
Joyce Morris Fund  
Margaret L. Musser Restricted  
Fund  
F. Robert Nunes Family Fund  
Perry-Downer House Fund  
**Anne Thorp Memorial Fund\***  
Dr. James Valentine Fund  
Maud Porter Work Rose Garden  
Fund  
Carl Young Memorial Earth  
Science Endowment Fund  
YWCA Endowment Fund

**Donor Advised Funds**  
Donors recommend grants  
from their fund to support  
nonprofit organizations and  
work with CFMC staff to  
enhance their philanthropy.

22 Love Fund  
Zekai and Carolyn Akcan Fund

Amy Anderson and George  
Somero Fund  
Anonymous Donor Temporary  
Fund  
**Antle Family Fund\***  
Rick and Tonya Antle Fund  
Joey & Dewitt Astin Memorial  
Fund  
Ausonio Family Fund  
Dan Baldwin and Anne Ylvisaker  
Fund  
Bareuther Family Foundation  
Peggy Downes Baskin Fund for  
Women's Reentry  
Lino and Teri Belli Family Fund  
The Benjamin Family  
Foundation  
Marta L. Bennett Fund  
Sarah and Robert Bouchier  
Fund  
Howard Franklin Bowker  
Numismatic Projects  
Endowment Fund  
Bright Futures Fund  
The Brown Family Fund  
Buccafurni-Lawrence Fund  
Buchalter/Adler Family Fund  
The Buffett Fund  
Josephine Bunn Fund  
Carmel Gives Fund\*\*  
Chappellet Youth, Arts, and  
Ecology Fund  
Chris's Fund  
Colleagues of the Arts  
Endowment Fund  
Community Healthcare  
Corporation Fund  
Cormorant Fund  
Scott Corwon Fund  
Andrew & Phyllis D'Arrigo  
Fund 2  
D'Arrigo-Martin Fund  
Stephen V. Davies Family Fund  
Donald McEnry Davis  
Charitable Fund  
Ila Davis Fund  
Eric and Ila Davis Fund  
Dekker Davidson Foundation  
Marcia F. DeVoe Fund  
Dewey Foundation Fund\*\*  
DeWitt Fund  
Marti and Steve Diamond  
Charitable Foundation Fund  
Martin and Nancy Dodd Fund  
Helen R. Doe Fund  
Doolittle Fund  
Jean and Jim Duff Fund  
Eimer/Cartwright Fund  
Howard and Karin Evans Fund  
Davis Factor, Jr. and Christine  
B. Factor Fund

Davis Factor, Jr. Fund 2  
Farrell/Allen/LaSalle Carmel  
Rotary Fund  
Farrell/Allen Carmel Rotary  
Fund  
Doris Parker Fee Fund  
Doris Parker Fee Fund 2  
Love our Central Coast Feed  
the Homeless Fund\*\*  
Ted Fehring Family/Carmel Host  
Lions Club Fund  
Ted Fehring Family/Carmel Host  
Lions Club Fund 2  
Jose F. Fernandez Fund  
**Anne R. Fitzpatrick  
Foundation Fund\***  
Lori and Lou Flagg Memorial  
Youth Fund  
**Franklin Legacy Fund\***  
Frances Memorial Fund\*\*  
Friends of Community Animal  
Services Fund  
Fuhs Family Foundation Fund  
Fuqua Family Foundation Fund  
Tom and Mary Kay Gallagher  
Fund  
Gerosin Fund  
Global Student Leadership Fund  
Gloria Fund  
Trinidad and Lupe Gomez  
Family Fund  
Jessica Govea-Thorbourne  
Memorial Fund  
Tom Grainger Memorial Fund  
Harlan and Barbara Hall Fund  
Dr. Adriana Hayward Fund  
The Peter and Jackie Henning  
Fund  
Joseph and Elizabeth Heston  
Family Foundation  
Hicks Fund for the Arts  
**Carol and Don Hilburn Fund\***  
The Ann Mayer Hiller Memorial  
Fund  
Elmer G. and William G.  
Hitchcock Fund  
Mary and Peter Hobley  
Memorial Fund  
Hodges Family Fund  
Jeanne Smith-Holmquist Fund  
Chip Hooper Foundation  
David G. Huey and Carla S.  
Hudson Family Fund  
Hughes-Rivera Family Fund  
Huth Family Fund  
Janzen Family Fund  
Birt and Kathleen Johnson, Jr.  
Fund  
Colburn and Alana Jones  
Foundation

Leslie B. Kadis, MD & Ruth  
McClendon Foundation Fund  
Kadushin Robinson Fund  
F.B. and B.H. Keith Fund  
**Carol and Chuck Keller Family  
Fund\***  
Karen M. and Brendan P. Kelly  
Fund  
Steven D. Kesselring and Jean  
M. Forrest Fund  
Jack and Patricia Kilmartin Fund  
Kobrinkev Evans Family Fund  
The Kohn Family Theatre and  
Arts Fund  
Phyllis Geer Krystal Fund  
Barbara Paul and Tom LaFaille  
Fund  
The Landreth Family Fund  
James and Susan Lansbury  
Fund  
Jefferson and Frances Larkey  
Memorial Fund  
Lee-Alexander Family Fund  
Lehman Family Fund  
William R. and Duncan B. Lewis  
Family Foundation Fund\*\*  
Phyllis and Herbert Lister Fund  
**Live and Give Fund\***  
Valera Whitford Lyles Fund  
MacGowan Pathwanderer Fund  
John and Kristina Magill Fund  
Mahoney/Peterson Family Fund  
The Marcus Family Fund  
The Marcus Family Fund 2  
Cambrel B. Marshall Fund  
Cappy Martin/Vernon Hurd  
Monterey Rotary Club Fund  
McHenry Family Fund  
Kim and Steve McIntyre Fund  
McMahan Family Fund  
Catherine L. and Robert O.  
McMahan Fund  
Marjorie McNeely Fund for the  
Blind or Illiterate  
Richard and Grace Merrill Fund  
Lenore and Dale Meyer Fund  
Lenore and Dale Meyer Fund 2  
Malcolm and Joanne Millard  
Fund  
**Clint and Karen Miller  
Charitable Fund\***  
James I. and Barbara S. Miller  
Charitable Fund  
Mills Family Fund  
Tim and Cindy Minor Charitable  
Giving Fund  
William and Patricia Monahan  
Fund  
Monterey Firemen's Charitable  
Association Fund





(l to r) Christine Dawson, Alan and Wendy Crockett, Kimberly and Anthony Belleci



CFMC Grants and Programs team



Josue R. and Cindy M. celebrate at Rancho Cielo graduation

Monterey Peninsula Sunrise Rotary Club Fund  
Howard and Anne Morgens Fund  
Lawrence and Carleton Mowell Fund\*\*  
Anthony and Lary Lynn Muller Fund  
Joan Ann Nattress - Movement, Exercise, Longevity Fund

#### **Martin Neadler and Jan Black Fund\***

Neidel Family Fund  
Gilbert M. Neill Math Fund  
Neumeier Taylor Foundation Fund  
Nonella Family Fund  
Don Nucci Fund for the Salinas Valley  
Oak Hill Charitable Fund  
Mike and Mary Orradre Fund  
Overett Family Fund

#### **Packer Family Foundation\***

Pagnillo Family Fund  
Nicholas M. Pasculli Fund  
Reed Family Fund  
Reese Family Fund  
California Rodeo Salinas Fund

#### **John and Annette Romans Family Fund\***

Rotary Club of Monterey, Cannery Row Fund  
The Fred Rowden Memorial Fund  
RSH Fund  
Salinas Rodeo Rotary Club Fund  
Salinas Rotary Club Fund  
Salinas Steinbeck Rotary Club Fund  
Fund for the Salinas Valley  
The James M. Shade Memorial Fund  
Will and Mary Shaw Fund

Shelley Family Fund  
Ramsey Shirk Fund  
Richard and Cindy Zoller Silver Family Legacy Fund

#### **Matthew Simis and Michael Gray Fund\***

Laura Sinks Fund  
Kendall and Kathryn Smith Family Fund  
Andy and Steffanie Smith Fund  
The Snorf Fund  
Cynthia Snorf Fund  
Steck Family Fund  
**Struve Family Fund\***  
Robert and Leslie Taylor Fund  
Gary and Emma Taylor Fund  
The Fred Terman and Nan Borreson Fund

#### **Thau Family Fund\***

Peter and Anne Thorp Fund  
Jim and Linda Tunney Fund  
Tyler Visiting Fellowship in Residence Fund  
William H. and Susanne S. Tyler Pathway Fund  
Dr. James Valentine Fund  
Vallentin Fund  
Vanderbilt Charitable Fund  
The Alexander F. Victor Foundation  
The Jackie and Mark Wendland Fund  
Maija, Eva and Cody West Family Fund  
Ben and Mary Ann Whitten Fund  
Wiegand Family Foundation  
Willemssen Family Fund  
Bill and Kathi Wojtkowski Fund  
Wold Family Foundation  
Martin R. Wolf Family Fund  
Marsha McMahan Zelus Fund  
Zeve Fund

#### **Field of Interest Funds**

Donors specify a charitable area of interest and the CFMC awards grants to local nonprofit organizations.

Ruth L. and Wilbur K. Amonette Fund  
The Todd Lueders Fund for the Arts  
Paul Block, Jr. Fund  
Patricia J. Boles Fund  
Maureen Bradford Fund  
Stephen and Madeleine Conran Fund  
The John & Mary Dawson Learning Fund  
Thomas Doud, Sr. and Anita M. Doud Fund I  
Ken and Gundy DuVall Fund  
Fund for the Environment  
Fred Farr Environmental Stewardship Fund  
Cyrus F. Fitton Fund  
Jean P. Fitton Fund  
Rudy E. Futer Fund for Human & Humane Needs  
Good Neighbor Basic Human Needs Fund  
Gumm Fund for the Performing Arts  
Elmer Mills Harris Fund  
Douglas Madsen Fund for HIV/AIDS Housing in Monterey County  
The Fund for Homeless Women  
The Fund for Homeless Women Non-Endowed Fund  
Terry Layne Fund for Beach Protection  
Kathleen and Howard Marks Fund  
The McKay Fund  
MPUSD Fund for the Arts

Leslie Mulford Fund  
Engracia Irene Murray Field of Interest Fund  
Margaret L. Musser Field of Interest Fund  
Andrew D. and Marjorie S. Orrick Fund  
Out Reach - A Fund for LGBTQ+ Life in Monterey County  
June P. Sheppard Fund for the Performing Arts  
Siembra Latinos Fund  
Frank Pye Smith M.D. Medical Facilities Fund  
Robert and Virginia Stanton Endowment Fund  
Irring R. and Helen G. Stuart Fund  
The James M. and Marjorie E. Sturgeon Fund  
Shirley I. Thackara Fund  
Evelyn and Spencer Thompson Fund to Help Feed the Hungry  
Dr. George & Sam Kih Thorngate Family Fund  
Tri-Counties Blood Bank Fund  
Anita Tarr Turk Fund for Breast Cancer Research  
Women's Fund Endowment Youth Fund  
**Florence Haspel Zeve Award Fund\***

#### **General Endowment Funds**

These funds provide philanthropic resources for CFMC community grantmaking.

Fund for the 21st Century  
Kathleen and Austin Barrows Fund  
Wendy (Millard) Benjamin Fund

**“Rancho Cielo relies on CFMC-inspired philanthropy to support Monterey County’s most vulnerable and marginalized youth, as they navigate through school and skill-building to success and self-sufficiency.”**

- Susie Brusa, CEO Rancho Cielo Youth Campus, Rancho Cielo Endowment Fund



(l to r) Shinae Meylor, Maija West and Cari Herthel support the Women's Fund



CFMC Board Chair Luncheon



Legacy Society members Judy Sulsona and Bill Rawson

#### Cislini Fund #2

#### **Leland Edmund Dake and Gloria Urban Dake Fund\***

Mary Jane Drummond Fund  
Lewis and Gloria Fenton Fund  
Fund for Monterey County  
(formerly General Endowment  
Fund of the CFMC)  
General Endowment-NGP  
Grants  
General Endowment -  
Opportunity Fund  
Marilyn & Philo Holland Fund  
Lauralie and J. Irvine Fund  
George P. and Betty Kendall  
Memorial Fund  
Leo Lanini Fund  
The Barbara and Joseph Lee  
Fund  
The John and Nancy Love Fund  
Jan and Tannie Mandel Fund\*\*  
John R. Marron Fund  
Paul Edward and Gay Dolores  
Rochester Fund  
The Donna Roop Endowment  
Fund  
The Scott Fund  
**Renita K. Seibel Fund\***  
Clyn & Pamela Smith Fund  
Evelyn Torras Fund  
CFMC Trustees Fund

#### **Private Foundation Funds**

These funds offer a customized blend of administrative support plus tax advantages, increased flexibility and personalized philanthropic services.

College Futures Foundation  
Fund  
The Joel and Dena Gambord  
Charitable Foundation  
The James Irvine Foundation  
Salinas Leadership Fund  
The Morse Foundation  
Scholarship Fund  
The Morse Foundation  
Stewardship Fund  
The David and Lucile Packard  
Foundation Fund  
S.T.A.R. Foundation of Monterey  
County Stewardship Fund  
Robert and Florence Slinger  
Fund

#### **Scholarship & Award Funds** Scholarship Donors invest in the potential of local students.

Monica Abbott Scholarship Fund  
AIA Monterey Bay Concepts  
Competition Fund  
American Culinary Federation  
Monterey Bay Chapter, Marc  
H. Vedrines Scholarship Fund  
Dr. William D. Barr Scholarship  
Fund for Excellence in  
Educational Leadership  
Dr. Roger and Kate Bartels  
Memorial Scholarship Fund  
**Belli Architectural Group  
Scholarship Fund\***  
The Bissell Fund  
James Bliss & Annette  
Sward Forestry & Nursing  
Scholarship Fund  
The Nan Borreson and Fred  
Terman Scholarship Fund  
Margaret and Seba Bronson  
Scholarship Fund  
Carol C. W. Butterfield Bacon  
Scholarship Fund  
The Larry Horan-Jim Langley Cal  
Alumni Memorial Scholarship  
Fund  
California Polytechnic State  
University Agriculture  
Business Department  
Endowment Fund  
Carmel High School Class of  
1952 Fund  
Carmel Valley Women's Club  
Foundation Scholarship Fund

#### **CASA of Monterey County Scholarship Fund\***

CHISPA Scholarship Fund  
Bill Clapper Memorial Music  
Scholarship Fund  
College Futures Monterey  
County Fund  
Raymond H. Costa Family  
Scholarship Fund  
Drezner Family Scholarship Fund  
The Elkhorn Slough Foundation's  
James Rote & Les Strnad  
Scholarship Fund  
David L. Ferguson Scholarship  
Fund  
Matthew Paul Finnigan  
Memorial Scholarship Fund  
Flagg Scholarship Holding Fund  
**Gabilan Hope Scholarship  
Fund\***  
Joel and Dena Gambord Nursing  
Scholarship

Girls' Health in Girls' Hands  
Scholarship Fund  
The Allen S. Griffin Fund  
Geraldyn R. Griffith Memorial  
Scholarship Fund  
Whitney Elisabeth Grummon  
Memorial Scholarship Fund  
R. J. Harper Memorial  
Scholarship Fund  
Jess Harrison Family Scholarship  
Fund  
Hausdorf Family Scholarship  
Fund

#### **Henry Hibino Memorial Scholarship Fund\***

Scholarship Fund for Homeless  
Women  
Bonnie Hutcheon Scholarship  
Fund  
Ipsen-Tully Cal Memorial  
Scholarship Fund  
Elke Junger Sharing for the  
Future Scholarship Fund  
Kier Memorial Scholarship Fund  
George V. Kriste Scholarship  
Fund  
Howard and Gretchen Leach  
Scholarship Fund  
Rotary Club of Monterey Martin/  
Hurd Scholarship Fund  
Men's Golf Association (MGA) at  
Quail Lodge Scholarship Fund  
**John S. Myszak Scholarship  
for Future Teachers\***

Robert Hattori Nakamura  
Memorial Scholarship Fund  
Anthony Nicholas Narigi  
Memorial Baseball  
Scholarship Fund  
Libby Olver Scholarship Fund  
Dr. Gladys M. Olvis Scholarship  
Fund  
Kristopher Pallastrini Fund  
Richard Scott Reynolds Science  
and Technology Education  
Scholarship Fund  
San Ardo Foundation for  
Education  
Theodore R. Sarbin Research  
and Scholarship Award Fund  
The Harles R. Sarment College  
Endowment  
Steven Paul Schmidt Scholarship  
Fund  
Alan and Rita Shugart  
Scholarship Fund  
Joseph and Betty Spradling  
Scholarship Fund  
Robert Stanton Award Fund

Wilbur H. and Maxine D.  
Stevens Scholarship Fund  
Hugo and Dolores Tottino Family  
Scholarship Fund  
Jack Van Zander Cal Alumni  
Memorial Scholarship Fund  
Vista Verde Labor Scholarship  
Fund\*\*  
Charles Joseph Watts  
Scholarship Fund  
Shelley Ann Watts Scholarship  
Fund  
Horace H. Wilson Scholarship  
Fund  
**World Affairs Council of  
the Monterey Bay Area  
Scholarship Fund\***

#### **Special Purpose Funds**

These funds are established for specific projects or initiatives with a limited time frame.

Animal Welfare Assistance  
Group Fund  
Big Sur Fire Fund  
Big Sur Disaster Relief Fund  
Casa Amesti Garden and House  
Fund  
Casa de Noche Buena Special  
Purpose Fund\*\*  
**Census 2020 Fund\***  
Center for Nonprofit Excellence  
Community Leadership Project  
COVID-19 Relief Fund\*\*  
Monterey County Development  
Professionals Fund  
King City Recreation  
Commission Forden Park  
Playground Fund  
Rudolph E. Futer Restricted  
Purpose Fund  
**Rudy Futer Pony Trust\***  
Girls Health Initiative  
Fund for Homeless Women  
Administrative Fund  
Monterey County Gives!  
The Monterey Experience  
Project Fund  
Monterey Peninsula Small  
Business Relief Fund\*\*  
Next Steps Administrative Fund  
Pathways to Safety  
Soberanes Fire Fund

**\*New Fund Created in 2019**

**\*\* New fund created in 2020**

The number of donors has grown and there are too many to list in print. Please find the list on our website at [cfmco.org/Donors](http://cfmco.org/Donors). Thank you for your partnership and support.





2019 Legacy Society Luncheon celebrates the impact of Legacy giving

## Legacy Society

Leaving a legacy through a planned gift is a very meaningful way to make a lasting impact. You can express your values through thoughtful estate planning now, and have the peace of mind that organizations you care about will be able to carry on their missions in the future. We are thankful to those who have made this important decision. If you have included the CFMC in your estate plan, please contact us at 831.375.9712 so we may recognize your generosity.

### Legacy Society Members

Anonymous (8)  
Mrs. Wilber K. Amonette\*  
Tonya and Rick\* Antle  
Yvonne A. Ascher and Leonard Laub  
Tony Ayres  
Daniel R. Baldwin and Anne Ylvisaker  
Robert P. Balles  
Nancy L. Bartell  
Lisa Bennett and Robin White  
John B. Bergin\*  
Paul P. Bianchi  
Nancy Bletzer  
Joyce Blevins and Katherine M. Coopman  
James W. Bogart  
Thomas Bohnen  
Steve and Barbara Brooks  
Jay and Ann Brown  
Julie A. Cason and Lisa K. Crawley  
Joseph and Betty Chaffers\*  
Mishka Chudilowsky and Henry Azama  
Mary J. Clapper Arthur Connell\*  
Julie Conrad  
Leland\* and Gloria Dake  
Robert N. Danziger and Martha Drexler Lynn  
Margaret D'Arrigo-Martin  
Larry Davidson and Beverly Dekker-Davidson  
Wallace F. and Lucille Davis\*  
Christine Dawson  
John and Gail Delorey  
Steve and Sona Dennis  
Martin Dodd\*

Meg Donat  
Jason A. Donovan  
Dr. William Donovan  
William and Nancy Doolittle  
Julie Drezner  
Stephen Eimer and Kevin Ann Cartwright  
Frances H. Elgan\*  
Bertie Bialek Elliott  
Norma Esselstyn\*  
Lowel I. Figen\*  
Cyrus and Jean Fitton\*  
Anne R. Fitzpatrick  
Crawford E. and Linda P. Foy  
Susie and Charly Franklin  
Joan M. Franz  
Joel S. and Dena Gambord  
James and Jeri Gattis  
Donald\* and Frances Gaver  
Lupé Gomez\*  
Rodney Guilfoil\*  
Terry Haber\*  
Ruth Hartmann  
Peter C. Hatton  
Virginia O. Hawes  
Dick Hawkinson\*  
Thomas Hawley  
Holly and Jeff Haynes  
Peter and Jacqueline Henning  
Joseph and Elizabeth Heston  
Carol and Don Hilburn  
Richard Hobley and Deborah Steel  
Jeffrey and Amanda Holder  
Jeanne S. Holmquist  
Tom Hopkins  
Robert and Millie House  
Chris and Tola Hubbard  
Kip and Jay Hudson  
Vince Huth

Michael and Gloria Ipson  
Jack Jewett  
Craig and Christine Johnson  
Joanne Taylor Johnson  
Mark and Susan Johnson  
Colburn and Alana Jones  
Joanne K. Juarez  
Deborah Juran  
Karen D. Kadushin  
Mary Ann Kane  
Rick and Martha Kenifer  
Capt. Steven D. Kesselring and Jean M. Forrest  
Alice V. Kinsler  
Paul Lawrence\* and Marian Buccafurni  
Douglas C. Lee  
Laurel Lee-Alexander  
Jennifer Levey  
David S. and Norma Lewis  
Esther H. Lindsey  
Robert H. Lindsey  
Janette Loomis  
Todd Lueders  
Valera W. Lyles  
Tom and Kathy Macdonald  
Jan\* and Tannie\* Mandel  
Roger and Carolann Manley  
Michael and Tobi Marcus  
Elizabeth Stacey & Wayne Peter Marien  
Joseph A. and Sheila Mark  
Dr. William McAfee  
Jan McAlister  
Sherrie McCullough  
Terry A. McHenry and Joan Smith McHenry

Thomas D. Melville  
Lenore Meyer\*  
Malcolm\* and Joanne Millard  
Patricia Monahan  
Sidney Morris  
Leslie Mulford  
Lary and Tony Muller  
Alec and Kim Murdock  
David M. Nee  
Vicki Nelson  
Diane R. Nonella  
F. Robert Nunes\*  
Alfred P. Oliverio  
Charles Olvis and Miranda Morris  
Mike and Mary Orradre  
Nicholas M. and Niccollette Pasculli  
Barbara Paul and Tom LaFaille  
Ken Petersen  
John Phillips and June Dunbar Phillips  
Gregory A. and Winoma Plaskett  
Rex\* and Joan Reade  
Donna Hart Reid  
Eugene and Maya Rizzo  
Michael Reid and Bill Robnett  
Paul Rochester\*  
Lee and Shirley Rosen  
Jean Rudolph\*, The Lauralie Irvine Foundation  
James C. Sanders  
John C. Sanders\*  
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Steven Paul Schmidt  
Maria Salazar Segovia  
Carol Shade\*  
JeriAnn Shapiro\*  
Connie Shelstad  
Robert B. Sheppard\*  
Janet L. Shing  
Laura Sinks  
Sidney Sue Slade  
Madison Smith\*

Pamela D. Smith\*  
Charles and Leslie Snorf  
George Somero and Amy Anderson  
David and Maryanne Spradling  
Jean Stallings  
Loren Steck and Annette Yee Steck  
Judy Sulsona and Bill Rawson  
Tom Sweeney  
Robert and Leslie Taylor  
Fredrick W. Terman and Nan Borreson  
Shirley Thackara\*  
Michael and Cindy Lee Thatcher  
Brian Thayer  
Peter and Anne\* Thorp  
Vincent\* and Evelyn\* Torras  
J. Breck Tostevin\*  
William H. and Susanne S. Tyler, III  
Patricia Tynan-Chapman  
William Umeki\*  
James R. Valentine\*  
Robin Venuti and Joseph Rock  
Arlene Wall  
Jacqueline Wendland  
Benjamin and Mary Ann Whitten  
Nels and Jill Wiegand  
Peter Hiller and Celeste Williams  
Martin R. Wolf  
Kenneth and Mary Wright  
Richard Zahn\*

\*In Memoriam

## 2019 Financial Statement

COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED  
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE  
YEAR ENDED DECEMBER 31, 2019

### Additions

Contributions*	22,736,109
Other income	486,642

<b>Total revenues and support</b>	<b>23,222,751</b>
-----------------------------------	-------------------

Investment gain	30,657,319
-----------------	------------

### Grants and expenses

Grants*	18,430,931
Other operating expenses	3,436,449

<b>Total grants and expenses</b>	<b>21,867,380</b>
----------------------------------	-------------------

Increase in net assets	32,012,690
------------------------	------------

### Net assets

Beginning of year	198,371,258
-------------------	-------------

<b>End of Year</b>	<b>\$230,383,948</b>
--------------------	----------------------

\*net of contributions received and grants disbursed on behalf of  
nonprofit agency and stewardship funds

## CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2019

### Assets

Cash and equivalents	12,091,210
Contributions receivable	1,630,636
Other assets	43,159
Property and equipment, net	1,867,741
Investments, carried at market value:	
Mutual funds and equities	231,316,060
Cash and money market funds	9,895,616
Charitable gift annuities	4,130,967
Beneficial interest in remainder trusts administered by other trustees	844,404
Investments held in charitable remainder trusts	29,181,461

<b>Total assets</b>	<b>291,001,254</b>
---------------------	--------------------

### Liabilities and net assets

Grants payable	1,019,371
Accounts payable and accrued expenses	142,229
Liabilities under split-interest agreements and charitable remainder trusts	21,835,735
Funds held for others	37,619,971

<b>Total liabilities</b>	<b>60,617,306</b>
--------------------------	-------------------

<b>Total net assets</b>	<b>\$230,383,948</b>
-------------------------	----------------------

## Quick Facts

gifts  
**\$31 million**

grants  
**\$19.2 million**

**33**  
new funds opened

**\$291 million**  
in assets

**Top 100**  
Community Foundations in  
the U.S. (asset size)  
Columbus Survey 2018



Confirmed in compliance with  
National Standards for U.S.  
Community Foundations.

The condensed financial information  
was prepared based upon audited  
financial statements prepared by  
Hutchinson and Bloodgood, LLP.

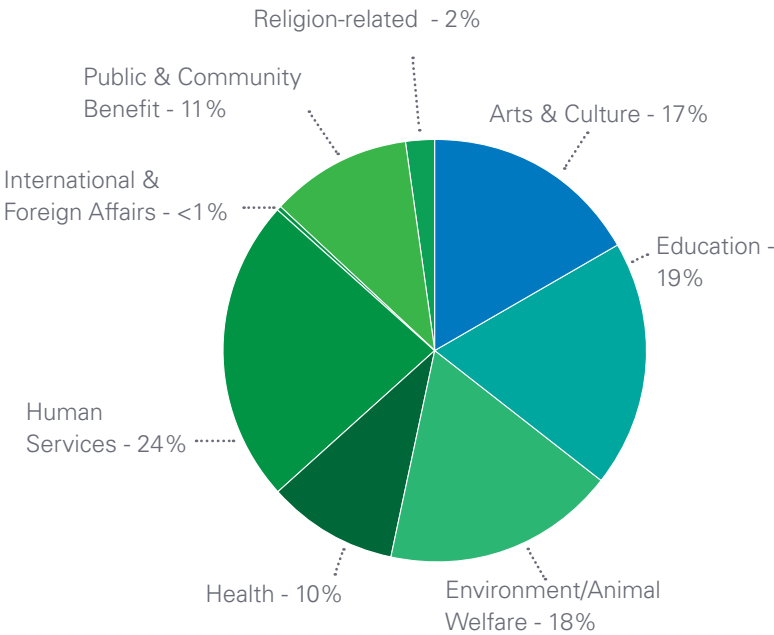


\$19.2 Million Granted

Grants by Program Area

Arts & Culture	3,179,082
Education	3,654,973
Environment/Animal Welfare	3,501,683
Health	1,838,758
Human Services	4,559,708
International & Foreign Affairs	54,685
Public & Community Benefit	2,123,126
Religion-related	305,371

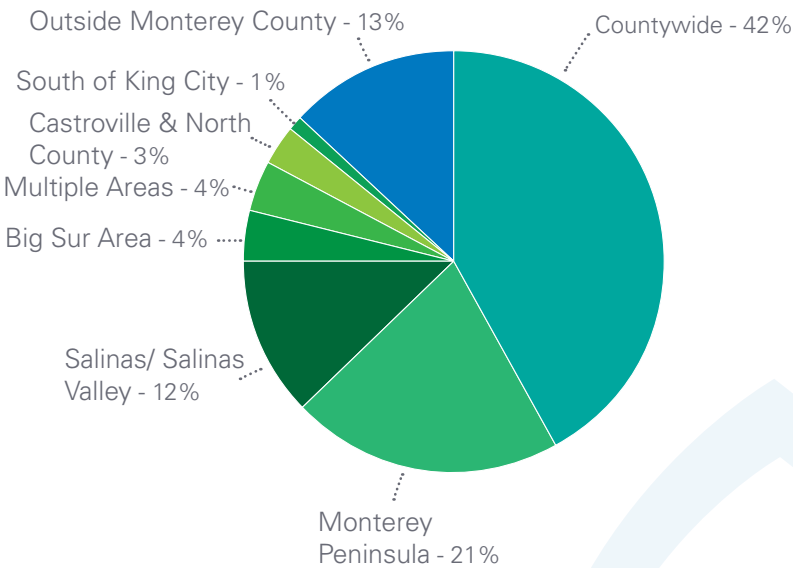
\$19,217,390



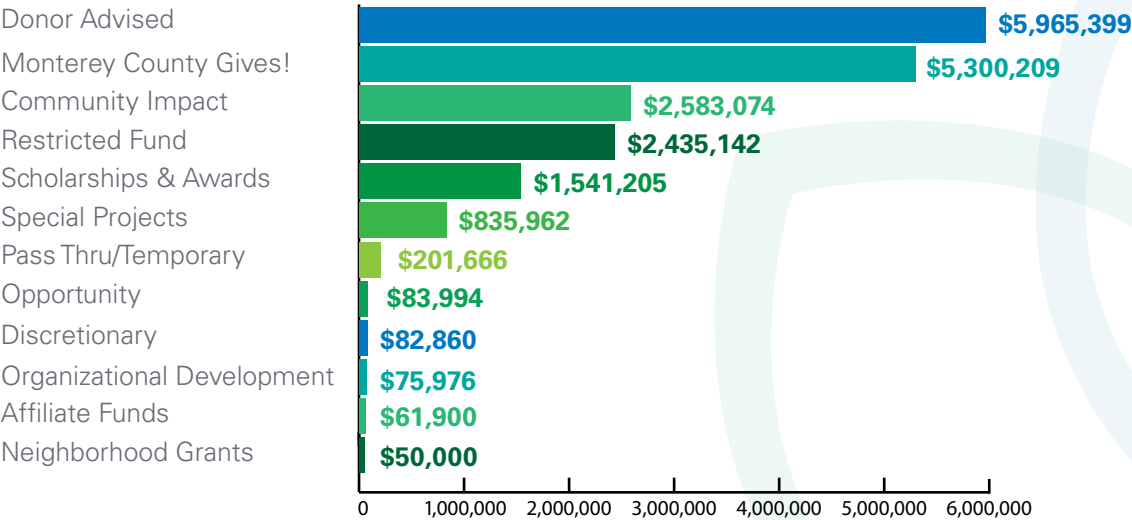
Grants by Region

Countywide	8,115,070
Monterey Peninsula	3,966,609
Salinas/Salinas Valley	2,307,090
Big Sur	857,321
Multiple Areas	704,080
Castroville & North County	546,740
South of King City	163,086
Outside Monterey County	2,557,391

\$19,217,390



Grants by Type





Standing (l to r) Bill Sharpe, Joe Pezzini, Abby Taylor-Silva, Nolan Kennedy, Giff Lehman, Elsa Mendoza Jimenez, Ida Lopez Chan, Michael Reid, Loren Steck, Kirk Gafill, Erica Padilla-Chavez, Fred Meurer, Betsey Pearson Seated (l to r) Jose Luis Alvarado, Betsy Buchalter Adler, Birt Johnson, Jr., Teri Belli, Jan Vanderbilt, Maija West. Not pictured: Judy Guzman Krueger, Francine Rodd

## 2020 Board of Directors

Birt Johnson, Jr. (Chair)

*Community Volunteer, former General Manager AT&T*

Teri Belli (Vice Chair)

*Owner, tBelli Business Consulting & Advising*

Jan Vanderbilt (Treasurer)

*Vanderbilt Certified Public Accountants*

Maija West (Secretary)

*Law Office of Maija West*

Betsy Buchalter Adler

*Trustee and Program Officer, Claire Giannini Fund*

Jose Luis Alvarado

*Dean of the College of Education, California State University, Monterey Bay*

Ida Lopez Chan

*Senior Vice President, Wells Fargo Bank*

Kirk Gafill

*President/CFD, Nepenthe/Phoenix Corporation*

Elsa Mendoza Jimenez

*Director of Health Services, Monterey County Health Department*

Nolan Kennedy

*Attorney at Law, Kennedy, Archer & Giffen*

Judy Guzman Krueger

*Managing Director/Regional Manager MUFG Union Bank, N.A.*

Giff Lehman

*Certified Financial Planner, Integris Wealth Management*

Fred Meurer

*Owner, Meurer Municipal Consulting*

Erica Padilla-Chavez

*CEO, Pajaro Valley Prevention and Student Assistance*

Betsey Pearson

*Nonprofit Consultant, Retired Vice President United Way Monterey County*

Joe Pezzini

*CEO, Ocean Mist Farms*

Michael Reid

*Co-founder, Fund for Homeless Women*

Francine Rodd

*Executive Director, First Five Monterey County*

Bill Sharpe

*Professor of Finance, Emeritus Stanford University's Graduate School of Business*

Loren Steck

*Retired Psychologist*

Abby Taylor-Silva

*Vice President of Policy & Communications, Grower-Shipper Association of Central California*

We are especially thankful to Jeff Eikenberry, Bill Mitchell and Ken Petersen, for their years of board service which ended in 2019.





*Standing (front l to r) Dan Baldwin, Karina Gutierrez-Barboza, Anh Le, Laurel Lee-Alexander, Janet Shing, Susie Polnaszek, Sarah Elias, Cristina Medina Dirksen (back l to r) Minnie Elliott, Brian Thayer, Erika Matadamas, Christine Dawson, Diane Nonella, Michael Castro, Mackenzie Little, Robert Mendoza, Phillip Carey, Julie Conrad, Kaki Rusmore, Amanda Holder*

## Staff

Dan Baldwin

***President/CEO***

Christine Dawson

***Vice President of Philanthropic Services***

Laurel Lee-Alexander

***Vice President of Grants and Programs***

Diane Nonella

***Vice President of Finance and Human Resources***

Phillip Carey

***Accounting Manager***

Michael Castro

***Program and Scholarships Officer***

Julie Conrad

***Administrative Services Manager***

Cristina Medina Dirksen

***Communications Coordinator***

Sarah Elias

***Administrative Coordinator***

Minnie Elliott

***Philanthropic Services Coordinator***

Karina Gutierrez-Barboza

***Grants and Programs Coordinator***

Amanda Holder

***Director of Communications***

Anh Le

***Senior Accountant***

Mackenzie Little

***Philanthropic Services Officer***

Erika Matadamas

***Program Officer***

Robert Mendoza

***Grants and Data Manager***

Susie Polnaszek

***Program Officer***

Kaki Rusmore

***Director Center for Nonprofit Excellence***

Janet Shing

***Director of Grantmaking***

Brian Thayer

***Senior Philanthropic Services Officer***

 [cfmco.org/AboutUs](https://cfmco.org/AboutUs)



2019 Investment Committee: Standing (l to r) Steve Dart, Steve McGowan, Craig Johnson, Anne Westreich (Verus), Loren Steck, Nolan Kennedy, Giff Lehman, Dan Baldwin (Seated l to r) Bill Sharpe, Bill Doolittle, Ken Petersen, David Benjamin Not pictured: Birt Johnson, Jr.

## 2019 Committees

### Executive

Birt Johnson, Jr. (Chair)  
Teri Belli (Vice Chair)  
Jan Vanderbilt (Treasurer)  
Jeff Eikenberry/Maija West  
(Secretary)  
Ida Lopez Chan  
Nolan Kennedy  
Ken Petersen  
Michael Reid

### Audit

Ida Lopez Chan (Chair)  
Birt Johnson, Jr.  
Jan Vanderbilt

### Endowment Stewardship

Betsey Pearson (Chair)  
Betsy Buchalter Adler  
Greg Chilton  
Elsa Mendoza Jimenez  
Birt Johnson, Jr.  
Ken Petersen

### Finance

Jan Vanderbilt (Chair)  
Teri Belli  
Birt Johnson, Jr.  
Fred Meurer

### Governance

Ken Petersen (Chair)  
Betsy Buchalter Adler  
Elsa Mendoza Jimenez  
Birt Johnson, Jr.  
Fred Meurer  
Maija West

### Grants and Programs

Ida Lopez Chan (Chair)  
Betsy Buchalter Adler  
Jose Luis Alvarado  
Birt Johnson, Jr.  
Bill Mitchell

### Investment

Ken Petersen (Chair)  
David Benjamin  
Steve Dart  
Bill Doolittle  
Birt Johnson, Jr.  
Craig Johnson

Nolan Kennedy  
Giff Lehman  
Steve McGowan  
Bill Sharpe  
Loren Steck  
Jan Vanderbilt

### Resource Development

Michael Reid (Chair)  
Erica Padilla-Chavez  
Birt Johnson  
Betsey Pearson  
Hanson Reed  
Abby Taylor-Silva  
Maija West

### ADVISORY COMMITTEES

#### Community Impact

Betsy Buchalter Adler (Chair)  
Ida Lopez Chan (Chair)  
Kathie Cain  
Meg Clovis  
Oscar Flores  
Sharon Gish  
Sandy Hale  
Giff Lehman  
Judy MacClelland  
Bill Mitchell  
Betsey Pearson  
Daniel Rodriguez  
John Scourkes  
Bill Sharpe  
Loren Steck  
Mark Verbonich

#### Northern Monterey County Foundation Advisory Board

Anne Herendeen (Chair)  
Nancy Ausonio  
Leslie Austin  
Ricky Cabrera  
Lou Calcagno  
Don Chapin  
Jesus Corona  
Karen Miller  
Susan Osorio  
Joe Pezzini  
John Phillips

#### Professional Advisor Council

Cris Cabanillas

Greg Chilton  
Gail Delorey  
Bruce Dunlap  
Nick Fantl  
Leslie Finnegan  
Liza Horvath  
Michael Jones  
Rick Kennifer  
Kathy Kobata  
Kyle Krasa  
Anne Leach  
Giff Lehman  
Stephen Pearson  
Ken Petersen  
James Stiles

#### Real Estate Advisory Committee

Greg Chilton  
Jim Heisinger  
Nolan Kennedy  
Rick Kennifer  
Birt Johnson, Jr.  
John Mahoney  
Bill Mitchell  
Ken Petersen

#### Robert and Virginia Stanton Endowment Committee

Ramona Smith (Chair)  
Iathan Annand (Vice-Chair)  
Stephen Dart  
Kip Hudson  
Mary Wright

#### Scholarships

Betsy Buchalter Adler  
Danielle Aguilar  
Ana Alvarez  
Heather Boensel  
Kevin Cartwright  
Linnae Ishii Devine  
Susan Dooley  
Esther Figueroa  
Susan Galvin  
Felica Perez Kausin  
Danielle Kuska  
Ivan Mendez  
Kim Negri  
Nettie Porter  
Esther Rodriguez

Aimee Sanchez-Toral  
Traci Townsend-Gieg  
Anthony Velasquez  
Ralph Widmar  
Kristen Yamamoto

#### Siembra Latinos Fund Advisory Board

Blanca E. Zarazua, Esq. (Chair)  
Ida López-Chan (Vice Chair)  
Jose Luis Alvarado  
Chris Barrera  
Erica Padilla-Chávez  
Lorraine Yglesias  
Daniel Rodríguez  
Elsa Mendoza Jimenez  
Raúl Rodríguez

#### Southern Monterey County Foundation Advisory Board

Jamie Jones (Chair)  
Linda Benway  
Grace Borzini  
Paulette Bumbalough  
Robert Cullen  
Michel Hardoy  
Peggy Keirn  
Mikel Ann Miller  
Teri Umbarger

#### Women's Leadership Advisory Council

Maija West (Chair)  
Tonya Antle  
Kevin Cartwright  
Margaret D'Arrigo-Martin  
Susan Galvin  
Jeri Gattis  
Krista Hanni  
Stephanie Harkness  
Felicia Perez Kausin  
Kate Daniels Kurz  
Julieanne Leavy  
Jana Nason  
Kim Negri  
Barry Peterson  
Judie Profeta  
Diane Danvers Simmons  
Traci Townsend-Gieg  
Jeannette Tuitele-Lewis





*CFMC Program and Scholarships Officer Michael Castro speaks with Michael and Gloria Ipson about their scholarship fund*

## Enhance Your Philanthropy

We invite you to partner with the Community Foundation for Monterey County to enhance your philanthropy. You can create a fund in three simple steps.

### START A FUND - It's Simple

#### 1. Create

Our team works with you to create a fund that reflects your charitable vision. You can establish a fund with a gift of \$5,000 or more. You decide if the fund is created in your name, your family or company's name, in honor of a loved one or anonymously.

#### 2. Choose

You choose the assets to make a gift to create the fund. The CFMC accepts a wide variety of assets. Cash, publicly traded securities, closely held stocks and real estate are often used. You can also direct a gift from your will or trust to create or add to a fund.

#### 3. Give

You recommend grants from the fund. We can help you make a difference on issues and causes that matter to you most in Monterey County or anywhere in the world.

#### Donor Advised Fund Benefits

Donor advised funds at the CFMC are convenient, flexible tools for individuals, families, businesses, or groups, making it an ideal vehicle for fulfilling your charitable wishes.

- Easy to establish and manage
- Can utilize a wide variety of assets (such as cash, appreciated stock or real estate)
- Receive immediate tax benefits in the year the gift is made
- Make grant recommendations now or in the future
- Receive grantmaking support and co-investment opportunities from our professional staff
- One gift can support multiple organizations
- Increased impact by investing and combining your gifts with others
- Simplify your record-keeping with 24/7 online access to your donation and grant history

A donor advised fund performs much like your own private foundation, but without the legal or administrative burdens. It can be created in a day at no start-up cost to you, compared to the time and financial expense required to create a private foundation. Please call 831.375.9712 or visit our website for information and donor stories.

 [cfmco.org/DonorAdvisedFunds](https://cfmco.org/DonorAdvisedFunds)



## Leave a Legacy through a Planned Gift

How will you express your values, experiences and interests to the next generation? Through a planned gift, you can be assured your charitable assets will be directed to the causes you care about most.

If you have made the important decision to include the Community Foundation for Monterey County in your estate plans, you can become a Legacy Society member (see page 33). Legacy Society members trust the CFMC to ensure their wishes are carried out. The annual Legacy Society Luncheon honors those who have chosen to partner with the CFMC through their estate plan.

### How it works

- You include the CFMC as a beneficiary of your will or trust. We can help you or your attorney with sample bequest language.
- You determine the type of fund you would like to establish with your gift and the nonprofit(s) you wish to support.
- Your charitable gift is excluded from your assets for estate tax purposes.
- Your gift creates a source of community capital, helping to do good work forever.

### Ways to Leave a Legacy

- Bequest (through your will or trust)
- Charitable Remainder Trust (CRT)
- Charitable Gift Annuity (CGA)
- Designate the CFMC as beneficiary of a Retirement Plan or IRA
- Gift of Life Insurance
- Create an Endowed Fund (or contribute \$25,000 or more to an endowed fund)

### Fund for Monterey County

The Fund for Monterey County is an endowed fund of the CFMC that provides philanthropic capital to meet the changing needs of Monterey County. You can choose a field of interest or make an unrestricted gift to provide grants to meet future needs and challenges. You can give to the Fund for Monterey County in your lifetime or consider a gift as part of your estate plan.

Please give Dan Baldwin or Christine Dawson a call at 831.375.9712 or visit our website to learn more. We would be honored to assist you in your planning.

 [cfmco.org/PlannedGiving](https://cfmco.org/PlannedGiving)

## 2019 In Memoriam



**Sue Antle**  
Legacy Society



**Jim and Barbara Miller**  
Donor Advisors  
Legacy Society



**F. Robert Nunes**  
Donor Advisor  
Legacy Society



**Anne Thorp**  
Donor Advisor  
Legacy Society



**Vincent Torras**  
Legacy Society



**J. Breck Tostevin**  
Former CFMC Board Member

**Terry Haber**  
Legacy Society (not pictured)



Growing **GIVING** 

Growing **IMPACT** 

## 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.

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# THANK YOU!

Our accomplishments are only made possible with your support.

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Community Foundation  
for Monterey County

**75**  
1945-2020  
Here for Good

**Monterey:** 2354 Garden Road, Monterey, CA 93940 | 831.375.9712  
**Salinas:** 945 South Main St., Suite 207, Salinas, CA 93901 | 831.754.5880





2354 Garden Road, Monterey, CA 93940

**Inside: COVID-19 Relief Fund Update**



**HEALTHY  
SAFE  
VIBRANT  
COMMUNITIES**