



75 Years of Responding to Community Need

MEETING THE MOMENT 2020



MISSION

Healthy, Safe, Vibrant Communities

VISION

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

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FAST FACTS



\$347 MILLION

Total Assets

\$57 MILLION

Record Gifts

\$27.9 MILLION

Record Grants

\$7.9 MILLION

Monterey County Gives!

\$1.8 MILLION

Awarded in 405 Scholarships

2,542

Grants

75th

Anniversary Year

47

New Funds Established

Cover photos: (from top) The Marina Foundation, Visiting Nurses Association (Richard Green), Seaside March for Justice (Michael Troutman, DMT Imaging), Dolan Fire (Los Padres National Forest)

MEETING THE MOMENT 2020

It's difficult to know whether 2020, the CFMC's 75th, was a year to remember or forget. No doubt the former, though the latter is tempting. Monterey County experienced the full force of COVID-19. We had three wildfires burning simultaneously. Long-standing inequities glaringly revealed themselves yet again, prompting protests and civic unrest. But it was also a year when, in the midst of constant turmoil, philanthropy was here to "Meet the Moment."

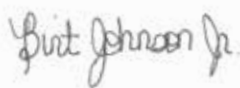
Entering 2020, none of us knew what it meant to shelter in place. Family, work and social bonds would be reframed. Zoom. Masks. Testing. Social distancing. Our most vulnerable communities indeed showed themselves as most vulnerable, with the highest incidences of infections, death and economic fallout. Historical challenges of food security, crowded living conditions and access to health care were greatly exacerbated. The stress on Monterey County businesses, government and nonprofits was enormous.

And yet when circumstances seem the most dire, the motivation to give – to help our neighbors – is at its greatest. The COVID-19 Relief Fund and the Monterey County Fire Relief Fund received thousands of gifts to help those in need. Rental assistance. PPE. Food. Shelter from fires. Gifts came from CFMC donor advisors, individuals, private foundations and businesses. Monterey County Gives!, the year-end campaign that is a partnership between the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation, smashed records in gifts and number of donors.

People now expect the CFMC to step forward in times of emergency, and we do as well. The CFMC embraced a leadership role in forming the 85-member COVID-19 Collaborative, helping to coordinate and align energies as our communities and business sectors responded to the COVID challenge. We're working closely with the county and ten participating community-based organizations in deploying nearly 100 specially trained community health workers as they encourage testing and vaccinations in our hardest hit communities.

Every household in Monterey County faced challenges in 2020. And so did every business, government entity, school and nonprofit. We're very proud of what the CFMC accomplished in 2020. Record gifts and grants. Leadership. All accomplished while the CFMC also worked remotely.

We're here for good. We're here for you. We're here to do our best to meet the moment.



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



Daniel R. Baldwin
President/CEO



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“WHEN CIRCUMSTANCES SEEM THE MOST DIRE, THE MOTIVATION TO GIVE – TO HELP OUR NEIGHBORS – IS AT ITS GREATEST...PEOPLE NOW EXPECT THE CFMC TO STEP FORWARD IN TIMES OF EMERGENCY, AND WE DO AS WELL...WE’RE HERE FOR GOOD. WE’RE HERE FOR YOU... TO MEET THE MOMENT.”

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"ESSENTIAL"
- Tonya Antle



"FULLY ALIVE"
- Michael Reid



"RELEVANT"
- Kip Hudson



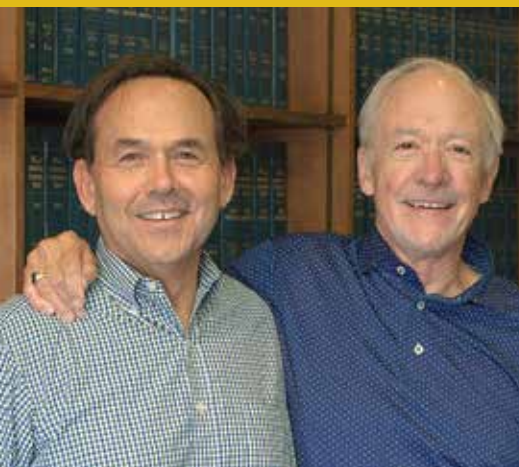
"IMPACT"
- Alfred Diaz-Infante



"HERE FOR GOOD"
- Congressman Jimmy Panetta



"LEADERSHIP"
- Erika Matadamas



"LEGACY"
- Greg Chilton and Bob House



"VISIONARY"
- Ida López Chan

What does the Community Foundation mean to you?



75 YEARS OF PHILANTHROPY IN ACTION

The 32 visionary men and women who met on a Monday afternoon in 1945 in Monterey's Old Custom House created a powerful legacy. They established "a responsible agency through which public spirited benefactors may contribute to funds." The first board members included Pebble Beach Company founder S.F.B. Morse, philanthropist Margaret Jacks, Presidio Commandant Col. Roger S. Fitch, Monterey's Mayor Carmel Martin, Sr., painter Armin Hansen, designer Francis Elkins and poet Robinson Jeffers. (See full list on page 20)

The Monterey Foundation, originally incorporated on March 26, 1945, was established to preserve historic adobes under threat of post-war development. The organization first purchased Casa Gutierrez for preservation and restoration. Fremont Adobe and Casa Abrego followed. In the 1960s, the scope broadened to include general charitable educational, philanthropic, cultural and benevolent purposes.

In the 1970s, the foundation expanded its work to include the preservation of select parcels of open space, including California's First Theater garden, the top of Jacks Peak, S.F.B. Morse Cypress Grove and Pescadero Point in Pebble Beach. Eventually the adobes and properties were donated to preservation groups. In the 1980s, the board began to build permanent endowments to benefit a full range of community needs. In 1984, the foundation changed its name to the "Community Foundation for Monterey County," opened a Salinas office and broadened grant making countywide. (See timeline, pages 20-21)

Our founders could never have imagined that the organization they established 75 years ago would have prepared us to meet the moment in 2020, a year like no other. Thanks to generous individuals, families and businesses, the CFMC was poised to respond to unprecedented community need. A record \$27 million was awarded, including COVID-19 and wildfire relief grants, donor advised grants and the Monterey County Gives! year-end campaign.

While the CFMC has evolved over the years, it continues to reflect the spirit of local philanthropy. Although we couldn't celebrate our 75th Anniversary in person due to the pandemic, we invited current and past board members, grantees and community members to reflect on the impact of the foundation in a series of videos. Throughout this report and at cfmco.org/75years, find out what the CFMC means to them in one word.

The future is bright. Through careful stewardship of the philanthropic resources entrusted to us, thoughtful planned gifts by our Legacy Society members, strong grants and community leadership, we plan to be "Here for Good" for the next 75 years. Our founders would be proud.



“THANKS TO GENEROUS
INDIVIDUALS, FAMILIES AND
BUSINESSES, THE CFMC
WAS POISED TO RESPOND TO
UNPRECEDENTED
COMMUNITY NEED.”



COVID-19: Responding to Community Need

Nothing defined 2020 as much as the COVID-19 pandemic. The virus spread physical, economic and emotional damage throughout Monterey County. The Community Foundation for Monterey County created the COVID-19 Relief Fund on March 16, 2020, with a generous commitment from the Monterey Peninsula Foundation. The COVID-19 Relief Fund supported local nonprofits providing food, housing, mental health, vaccines and other critical services.

Individual donors, CFMC fund holders, businesses and private foundations responded. The fund has no fees, so 100% of contributions support nonprofits that serve Monterey County. We are extremely grateful to help channel the generosity of the community into reducing the spread of COVID-19 and helping those affected.

More than \$3.4 Million Awarded

Grants helped feed families, purchase masks and personal protective equipment for medical workers, provide childcare for essential workers, offer services for seniors, people experiencing homelessness and those with special needs. Many nonprofits shifted their business models to support families by providing critical supplies such as meals and gift cards.

Emergency Assistance Funds

In addition to the COVID-19 Relief Fund, the CFMC partnered with several organizations to address specific needs.

- The CFMC collaborated with the Monterey Peninsula Chamber of Commerce to create the **Small Business Relief Fund**, which helped businesses hard hit by the economic impact of the pandemic.
- **Carmel Gives Fund** was created by Tim Allen Properties as part of a movement to help local businesses and provide assistance to those in need. They completed more than 40 projects including mask and food distribution, raised \$590,000 and granted \$440,000 through May 2021. (See page 19)



**\$3.4
MILLION**

granted in
150 grants
(through May 2021)

\$3,955,595

received from
613 donors

\$962,851

added to the fund in grants
and gifts from CFMC Donor
Advisors, plus more than
\$1 million granted directly for
COVID-19 relief



The Community Foundation is
“LIFESAVING.”

- Staci Alziebler-Perkins
Executive Director
Gathering for Women

See video: cfmco.org/75years

◀ (from top) Community Human Services, Salvation Army Monterey Peninsula Corps, Central Coast YMCA, Rancho Cielo Youth Campus

COVID-19

• **The Club at Pasadera Employee Emergency Assistance/Relief Fund** and **Corral de Tierra Country Club Employee Emergency Assistance/Relief Fund** were created to help employees facing economic hardship due to the shelter in place order.

• A team of community members established the **Love Our Central Coast Feed the Homeless Fund** with a gift from an anonymous donor to help those living without shelter.

Leveraging Impact

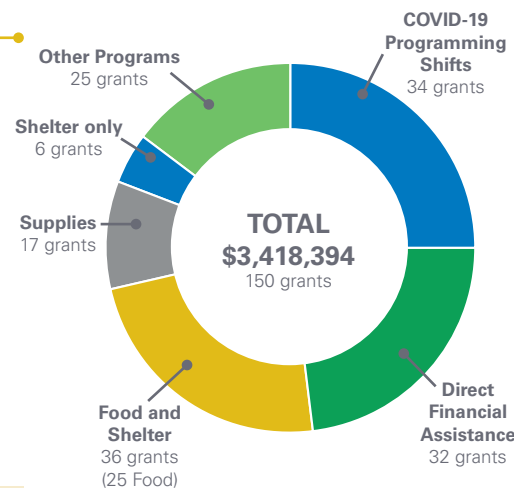
The CFMC committed \$1 million through its Community Impact Investment Program to help fund loans to small business owners who were not eligible for the Payroll Protection Program and other CARES Act benefits. The CFMC worked through the Mission Economic Development Agency (MEDA) to support the El Pájaro CDC as they brought resources to small businesses in North County. The CFMC also made a direct loan to California Coastal Rural Development. This led to a \$1 million grant from The James Irvine Foundation to create a revolving loan and training program for entrepreneurs of color in Salinas. (See page 27)

CFMC President/CEO Dan Baldwin is leading the COVID-19 Collaborative. This countywide, multi-sector group brings together Monterey County, cities, agriculture, hospitality, education, healthcare, community-based organizations and philanthropy to lower the spread of COVID-19. (See page 23)

COVID-19 Relief Fund Grants

COVID-19 related programming shifts to support vulnerable populations	\$857,137
Direct financial assistance to individuals and families	\$785,875
Food and Shelter (Food subtotal \$519,400)	\$806,387
Supplies - emergency, program	\$314,400
Shelter only	\$157,845
Other programs	\$496,750

TOTAL Totals reflect grants through March 8, 2021 **\$3,418,394**



“WE WANT TO THANK THE CFMC FOR THEIR SUPPORT DURING COVID-19. OUR GRANT FOR PPE WAS VERY IMPORTANT AS OUR CLIENTS ARE ELDERLY, DEVELOPMENTALLY DISABLED FOLKS WHO ARE VERY FRAGILE. THE CFMC HAS BEEN VERY SUPPORTIVE OVER THE YEARS OF THE NONPROFIT COMMUNITY AND WE REALLY APPRECIATE THAT.”

- Robert Frieri

Executive Director

Gateway Center of Monterey County

MONTEREY COUNTY FIRE RELIEF

Monterey County Fire Relief Fund

Fire blew through hills outside of Salinas, creeping down and over Carmel Valley ridges and into Big Sur in August of 2020. A lightning strike on August 16 grew into the “River Fire.” It scorched land and took homes in areas south of Las Palmas into Pine Canyon, burning deep over into the Arroyo Seco area. Two days later in Carmel Valley, ranch land and areas of rural Cachagua and Sky Ranch burned in the “Carmel Fire.” That same day, the “Dolan Fire” in Big Sur began, injuring three firefighters, creating a massive fire response and days of evacuations, smoke and fear.

The CFMC’s response was swift. Within 48 hours it created the Monterey County Fire Relief Fund to assist communities affected by all three fires. The fund assisted relief and recovery efforts and will make grants in response to future fires. Neighbors helped neighbors, not just with evacuations, but with funds.

Localized giving supported the Community Fund for Carmel Valley and the Big Sur Disaster Relief Fund (See pages 7 and 8), offering further hope. In total, donors gave \$1.34 million to the Monterey County Fire Relief Fund, the Community Fund for Carmel Valley and the Big Sur Disaster Relief Fund. Gifts ranged from \$25 to \$100,000, with 100% used for grantmaking.

36 Grants to 21 Organizations

American Red Cross of the Central Coast
Big Sur Fire
Big Sur Grange
Big Sur Land Trust
Big Sur Park School
Cachagua Fire Protection District
Carmel Valley Kiwanis Foundation
Carmel Valley Rotary Club Foundation
Catholic Charities of the Diocese of Monterey
Community Association of Big Sur
Community Emergency Response Volunteers of the Monterey Peninsula (CERV)

Conservancy for the Range of the Condor
Foundation for Monterey County Free Libraries
Friends of Cachagua Children’s Center
Hope, Horses & Kids
Meals on Wheels of the Monterey Peninsula
MontereyCoRecovers Relief Fund
Monterey County Office of Emergency Services
Monterey County Youth Museum
Salvation Army - Monterey Peninsula Corps
Ventana Wildlife Society

◀ (from top) River Fire (Richard Green), Dolan Fire (Michael Troutman, DMT Imaging), Carmel Fire (Michael Troutman, DMT Imaging)



“EVACUEES, THOSE DEALING WITH THE LOSS OF HOMES, PEOPLE DEALING WITH TRAUMA. THE COMMUNITY CAME OUT, TONS OF STUDENTS CAME OUT LOOKING TO HELP. IT WAS WONDERFUL TO SEE AND EXPERIENCE THAT UNITY.”

- Alondra Valdez Klemek

Community Fund for Carmel Valley Advisory Board Member



COMMUNITY FUND FOR CARMEL VALLEY



Ramon Ruelas and fellow firefighters ▲

On August 18, Cachagua resident Ramon Ruelas rose at his usual hour – 5:20 a.m. – to feed his family's menagerie of goats, horses and chickens. Then he put on his green correctional officer uniform. Like most mornings, he caught the sunrise as he left his wife,

Angie, and three children sleeping on their 15-acre dream property – having recently moved to a three-bedroom home in the country.

By sundown, it would all be gone. A vegetation fire, fueled by incessant winds and near 100-degree temperatures, ravaged through pastures and rugged ranch land, growing into the 6,905-acre Carmel Fire. It burned for 19 days, destroying 73 structures and damaging seven more.

"I just knew there was a good possibility we'd lose it, our home. Hearing the radio traffic, the fire was moving fast. It was the real thing," said Ramon, who would see first-hand more than he would ever anticipate. Changing from his green uniform into yellow wildland fire gear, he raced home to join his fellow Cachagua volunteer firefighters beating back flames and shielding his eyes from smoke for the next 48 hours. Several fellow firefighters also lost their homes.

Family, friends and strangers pitched in to load the animals while Angie and the kids headed to her parents' home in Seaside. The nine goats, 26 chickens, two horses and even a ram were removed from harm's way – some were packed into cars and arrived at the Marina Equestrian Center near midnight.

New to the Valley, the Ruelas family was worried how they would ever recover. But strangers hugged him and handed his wife gift cards at the grocery store and the gas station. The Community Fund for Carmel Valley, an affiliate fund of the CFMC, took the lead to help them and 26 other families, raising and granting \$188,000 to nonprofits to provide emergency relief and recovery support directly to those in need.

"We are very grateful and honored – my wife and I work for everything and are usually on the other side, helping others. For strangers to care about us shows there is humanity out there, it's here in Carmel Valley," said Ramon.

With funds from the Community Fund for Carmel Valley, Ramon bought a water tank. His family is working on plans to rebuild, living on the property for now in a trailer they bought with money raised for them by the community.

"I tell my wife this happened to us, but everything is going to be okay. We are safe and we have everything we need to rebuild, little by little. We will get back to where we were, there's bigger things in store for us. That's because we are here today, very grateful to our community who check in on us, even now, months after we lost everything material. We gained a community."

\$188,000 Granted for Fire Relief

The Community Fund for Carmel Valley is an affiliate fund of the CFMC. The fund launched in early 2020 and is led by an advisory board of local residents. Their role is to provide oversight, raise funds, define grantmaking priorities and award grants.

Part of the mission is to enable rapid response for disaster relief for Carmel Valley residents. More than 300 donors gave to the Community Fund for Carmel Valley for Carmel Fire Relief. The Fund partnered with Community Emergency Response Volunteers of the Monterey Peninsula (CERV) to deploy funds to Carmel Valley and Cachagua residents.

The fund awarded \$135,000 in grants to CERV to provide direct financial assistance to affected residents, including 21 who lost homes and possessions. The fund also granted \$15,000 to Friends of Cachagua Children's Center for food and gift cards for those most impacted. An additional \$38,000 was granted to CERV in early 2021 to support 6 more families. The Community Fund for Carmel Valley continues to fundraise to be ready for any future emergencies.

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“WE ARE VERY GRATEFUL AND HONORED – MY WIFE AND I WORK FOR EVERYTHING AND ARE USUALLY ON THE OTHER SIDE, HELPING OTHERS. FOR STRANGERS TO CARE ABOUT US SHOWS THERE IS HUMANITY OUT THERE, IT’S HERE IN CARMEL VALLEY.”

- Cachagua resident, Ramon Ruelas

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WESTON CALL FUND FOR BIG SUR

The Weston Call Fund for Big Sur was created to honor Weston Call, who passed away in 2018 at age 32. The fund he inspired led the way for immediate community assistance when wildfires hit the region. Neighbors and friends sharing Weston's deep love and respect for Big Sur were positioned to aid those whose homes and livelihoods were threatened by the Dolan Fire. When the Big Sur Disaster Relief Fund, a component of the larger fund, was activated, a system of volunteers mobilized to identify community needs.

"We had a system set up, a process for evaluating need and ways to meet the need," said Butch Kronlund, an advisory board member of the Weston Call Fund for Big Sur. "The CFMC provided us with the direction and together with financial resources we can help in times of need. There will certainly be more times in the future."

The Big Sur Disaster Relief Fund helped with fire relief. "How we responded in 2020 was emblematic of Weston's attitude of taking on hard things. We are all in this together and looking for a common purpose," Kronlund said. More than \$43,000 was awarded to complement grants from the Monterey County Fire Relief Fund.

Mission of the Weston Call Fund for Big Sur

The fund's mission is, "to provide sustainable, impactful and supplemental funding to nonprofit organizations benefiting the residents of Big Sur and build resources for disaster relief." Grants support programs and services for people from Mal Paso Creek to the county line. Priorities include: Health, Safety, Education, Arts, Culture and Community Stewardship.

Goals of the fund are to:

- Create additional funding for health, fire and safety needs through Big Sur nonprofits
- Support educational, cultural and historical programs
- Aid sustainable tourism and destination stewardship efforts
- Create and enhance community partnerships
- Support nonprofits providing services in Big Sur
- Respond to disaster through the Big Sur Disaster Relief Fund, a component fund of the Weston Call Fund for Big Sur.

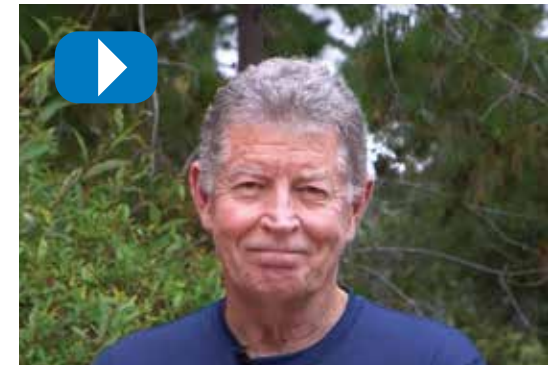


\$43,797

Granted from Big Sur
Disaster Relief Fund

4 GRANTS

Big Sur Grange Hall #742
Big Sur Park School
CERV
Ventana Wildlife Society



The Community Foundation is a
"PARTNER."
- Butch Kronlund
Executive Director
Community Association of Big Sur

See video: cfmco.org/75years

◀ (from top) Fire suppression and Big Sur Coast (Michael Troutman, DMT Imaging), Dolan Fire (Michael Troutman, DMT Imaging), condor (Ventana Wildlife Society), Big Sur Grange Hall #742 (Chris Counts)

MONTEREY COUNTY GIVES!



In a year when the need was so great, donors came together in amazing ways. They stepped up to support the 162 nonprofits that participated in the annual Monterey County Gives! campaign.

MC Gives!, a partnership of the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation, raised \$7.9 million from 7,576 donors, easily surpassing its prior year record of \$5.4 million. This marks a 46% increase in the dollar amount given and a 51% increase in the number of donors over the prior year.

The end-of-year campaign is structured to provide participating nonprofits a platform to share their ideas, and a pro rata match made possible by foundations, businesses and CFMC donor

advisors. Since launching in 2009, more than \$34 million has been raised and granted to local nonprofits.

Each year the CFMC presents four special awards. The Center for Community Advocacy received the \$2,500 Ingenuity Award, the Food Bank for Monterey County received \$1,000 for the Most Donors (860), Teddy Bears with Heart received \$1,000 for the Most Young Donors (83 donors between 18 and 35 years old) and Community Human Services received the \$1,000 Florence Haspel Zeve Award. This award, funded through an estate gift from Ms. Zeve, goes to the nonprofit that demonstrates leadership and ingenuity impacting women, children, families, education and/or the arts.

“Providing support to agencies that work with the homeless, youth, food security, education, environment, the arts and more is critical to maintaining the excellence of our community,” said Dan Baldwin.

MONTEREY COUNTY GIVES!
Joining Together for Big Ideas



Monterey County Gives! is a special purpose 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, eight CFMC Donor Advisors sponsored the overall matching fund.



MONTEREY COUNTY GIVES! BY THE NUMBERS

Total Raised
\$7,891,987

Individual Donations
\$5,987,162

Organizational Challenge Gifts
\$1,386,490

Overall Matching Fund
\$518,334

Number of Donors
7,576

NEIGHBORS HELPING NEIGHBORS

Localized giving is at the heart of CFMC affiliate funds. Their leaders are familiar faces and trusted members of their communities. 2020 showed the affiliate funds' ability to be responsive and nimble in communities from Northern to Southern Monterey County and Carmel Valley.

Northern Monterey County Foundation

In July 2020, its fourth year of grants, the Northern Monterey County Foundation (NMCF) made \$35,000 in grants to 11 nonprofits, including a donation to the COVID-19 Relief Fund of the CFMC. Focused on filling the gaps for underserved communities in Northern Monterey County, the NMCF has granted more than \$128,500 since 2016.

"The families we serve were hit hard by the pandemic. Thanks to the grant we were able to offer families rental assistance and help with basic needs," said Mike Johnson, Pajaro Valley Shelter Services Executive Director.

The NMCF's mission is to serve the communities of: Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita.

2020 grantees include: Central Coast YMCA, Coastal Kids Home Care, COVID-19 Relief Fund of the CFMC, Girls Inc. of the Central Coast, Jacob's Heart Children's Cancer Support Services, Legal Services for Seniors, Pajaro Valley Shelter Services, Partnership for Children, Rancho Cielo, Together in Pajaro, and Wonder Wood Ranch.

Southern Monterey County Foundation

The lockdown that came with the COVID-19 pandemic created isolation for many. Among those who struggled to deal with restrictions were teenagers, a group coming into their freedom. The Southern Monterey County Foundation (SMCF) helped fund an oral history film project to document South County teens experiencing life under COVID-19 lockdown.

"The Class of 2020 went home and never went back to high school again," said Jessica Potts, Monterey County Agricultural & Rural Life Museum (MCARLM) Executive Director, whose organization backed the project. "We hear about how COVID-19 impacts adults on the news, but what about our youth?"

Since 2014, the SMCF has granted over \$142,750 to benefit the communities of Southern Monterey County.

2020 grantees include: Campaign for the Preservation of Mission San Antonio de Padua, COVID-19 Relief Fund of the CFMC, Girls Inc. of the Central Coast, Greenfield Community Science Workshop, King City Boxing Club, Kinship Center, Monterey College of Law, MCARLM, Monterey County Pops!, Partnership for Children, Sol Treasures, Special Kids Connect and Sun Street Centers.



Pajaro Valley Shelter Services ^



MCARLM's Teens in Quarantine project ^



Northern Monterey County
Foundation granted
\$35,000
to 11 nonprofits

Southern Monterey County
Foundation granted
\$21,250
to 13 nonprofits

CENSUS 2020

The CFMC created the Census 2020 Fund to support efforts that increased response rates. Higher response rates mean Monterey County will receive important funding that will benefit residents over the next 10 years. In spite of the challenges presented by COVID-19 and multiple fires, Monterey County achieved a self-response rate of 65.6%, an increase of 1.2% over the 2010 efforts.

Lessons learned from the Census outreach effort centered around developing the right team, investing in administrative infrastructure, and listening carefully to the community for creative solutions to reach people where they live, work, shop and play.

Success Spotlight: North Monterey County Youth

A \$15,000 grant from the CFMC allowed a group of 20 youth leaders organized through the North Monterey County School District (NMCSD) to increase the Census self-response rate in their community. The group was supported by Yvette Padilla, a NMCSD employee and locally-known volunteer and youth supporter.

The team initially formed before COVID-19, and had planned a major community-wide event to honor local elders. When that had to be canceled, they pivoted into COVID-safe, mostly online outreach and split into three teams: social media, marketing, and video production. The group managed very active social media accounts on Facebook, Instagram, Twitter, and TikTok. They made videos that went viral and were shared throughout the community and across the state, hosted art competitions, were sought-after guests on local radio shows, and hosted interactive games, online raffles, phone banks, and a Census caravan. They sent emails to teachers and their own networks, organized a Census Day event, and utilized teammates who spoke Mixteco to create videos and Census materials in that indigenous language.

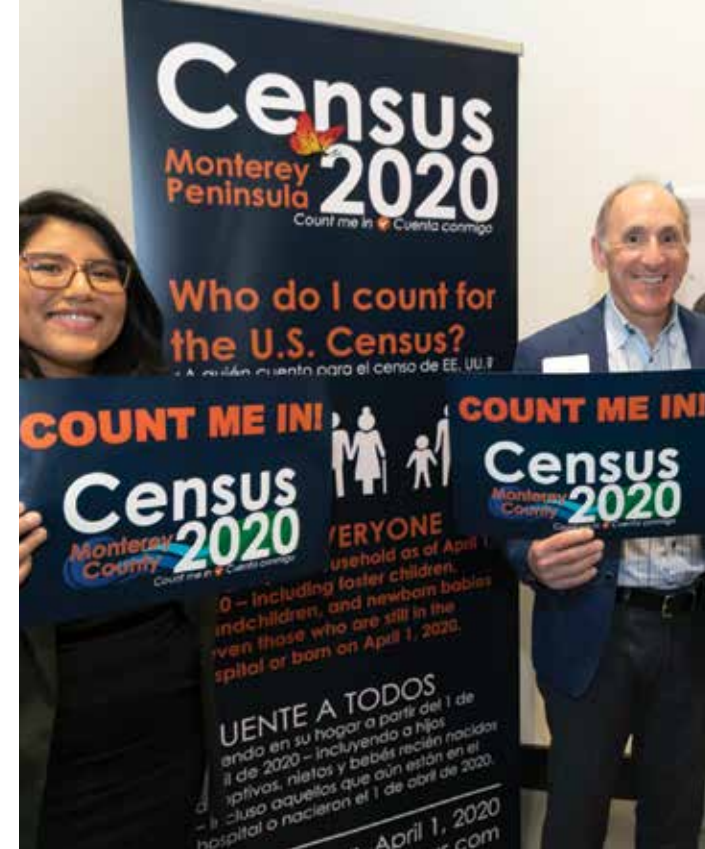
Aside from seeing their community's self-response rate soar from 51.2% when their efforts began to 68.2%, youth reported benefits of gaining valuable work experience in public speaking, civic engagement, and partnership building. The group was invited to share their efforts with the state and local Complete Count Committees. One group member reported that he won a scholarship because of the Census outreach videos they built for their community.

2020 Census Grantees

Action Council for Building Healthy Communities, Labor Council, COPA
California Rural Legal Assistance
Castroville Coalition
Catholic Charities of the Diocese of Monterey
Center for Community Advocacy
Central Coast Center for Independent Living

Community Association of Big Sur
Centro Binacional Para el Desarrollo Indigena Oaxaqueno
CHISPA
City of Seaside
Coalition of Homeless Service Providers
Community Builders for Monterey County
First 5 Monterey County

Lideres Campesinas
Loaves, Fishes, and Computers
Pajaro Valley Prevention and Student Assistance
Radio Bilingue
United Way Monterey County
University Corporation at Monterey Bay



“THIS IS AN INITIATIVE THAT CAN PROVE TO ANYONE THAT WE CAN DO IT - THAT WE CAN RELEASE THAT POWER OF DECISION MAKING AND GIVE IT TO THE COMMUNITY. IT IS POSSIBLE AND IT’S A POWERFUL THING WHEN YOU ALLOW IT TO HAPPEN.”

-Rosemary Soto

Manager, 2020 Census Complete County Committee for Monterey County



SIEMBRA LATINOS FUND

The Siembra Latinos Fund (SLF) inspires giving by and for Latinos in Monterey County. Siembra means “to sow” and the goal is to grow opportunities for Latino residents to donate and invest in community grantmaking.

In 2020, the fund supported the COVID-19 Relief Fund of the CFMC to make grants to nonprofits assisting the Latino community, which was disproportionately impacted by the pandemic.

The SLF also presented a Zoom discussion about the impact of COVID-19 on Monterey County Latinos. In Fall 2020, Latinos represented 93% of cases despite being 61% of the total population.

The panel was hosted by SLF Advisory Board Chair Ida López Chan and moderated by Advisory Board member Blanca Zarazúa. It featured panelists Fernando Torres-Gil, Professor of Social Welfare and Social Policy, UCLA and CFMC board member Elsa Mendoza Jimenez, Director of Health, Monterey County Health Department. To view the recording, visit cfmco.org/Covid19&Latinos.

“We must continue to take care of ourselves and our essential workers now and beyond COVID-19, to take off the ‘bandage’ and finally address the root causes of social inequities,” said Elsa Mendoza Jimenez.

“THE DISPROPORTIONATE IMPACT OF COVID-19 ON THE LATINO COMMUNITY HIGHLIGHTED DEEP-ROOTED INEQUITIES THAT REQUIRE BOLD SOLUTIONS. THE SIEMBRA LATINOS FUND IS COMMITTED TO ADDRESSING THE IMMEDIATE AND LONG-TERM NEEDS OF LOCAL LATINOS.”

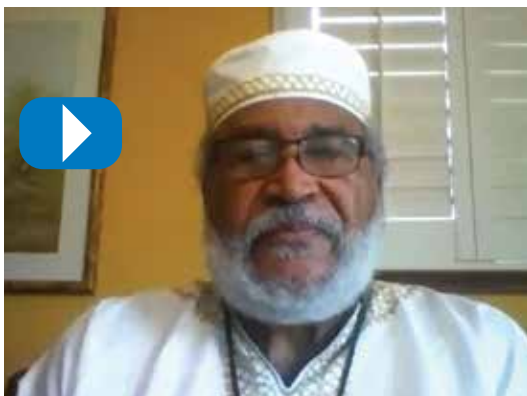
– Ida López Chan, Siembra Latinos Fund Advisory Board Chair

DIVERSITY, EQUITY AND INCLUSION

The CFMC embeds the principles of diversity, equity and inclusion, known as “DEI,” throughout its grantmaking programs, initiatives and projects. The CFMC utilizes an equity lens to inform initiatives that foster capacity building for groups assisting Monterey County residents with the least access to services. Many Center for Nonprofit Excellence (CNE) programs address diversity and inclusion, including its support for emerging leaders of color through the LEAD Institute.

Initiatives such as College Futures Monterey County, the James Irvine Foundation Pilot Salinas Project, the Community Leadership Project, Neighborhood Grants Program, Next Steps for Small Nonprofits and Girls’ Health in Girls’ Hands brought groups and people together to strengthen neighborhoods and communities using equity principles. Partnerships have also helped the CFMC work with other committed groups to increase equity in Monterey County.

In response to the murder of George Floyd, President/CEO Dan Baldwin and 2020 Board Chair Birt Johnson, Jr. expressed the CFMC’s values in a guest commentary for the *Monterey County Herald* stating, “We must commit to the elimination of systemic racism.” (See cfmco.org/BuildingEquity) The moment was the impetus for conversations within the CFMC and with community members about the CFMC’s role in collaborating and leading to increase equity for all Monterey County residents.



The Community Foundation is a
“FORCE FOR GOOD.”
- Mel Mason
Founder and Executive Director
The Village Project, Inc.

See video: cfmco.org/75years

At the CFMC’s Annual Board retreat, board and staff revisited CFMC’s Strategic Plan. The board agreed to update and revise specific elements of the plan, including its values statement.

“Our intention was to further demonstrate our commitment to diversity, equity and inclusion and we expanded our statement to explicitly include equity. The board and staff are committed to continue our DEI journey,” Birt explained.

There is more work to be done and the CFMC’s efforts continue. A staff DEI committee is leading efforts to advise and support the CFMC in growing in these areas. Community convening and leadership is ongoing and the CFMC is committed to helping Monterey County become more diverse, inclusive and equitable.



Michael Troutman, DMT Imaging

“THE BOARD IS DETERMINED TO
CONSIDER APPROACHES WHICH
FURTHER DEFINE AND EXPAND
OPPORTUNITIES TO SUPPORT
THESE PRINCIPLES.”

- Birt Johnson, Jr.
2019-2020 CFMC Board Chair



“THANKS TO THE COMMUNITY FOUNDATION’S SWIFT ACTION, OUR LOCAL NONPROFITS HAVE RECEIVED MUCH NEEDED RESOURCES TO RESPOND IMMEDIATELY TO THE PANDEMIC.

I BELIEVE MANY LIVES WILL BE SAVED AS A RESULT.”

- Robin McCrae, Chief Executive Officer
Community Human Services

GRANTMAKING IMPACT

\$27 Million Granted

When we think of 2020, the words that come to mind are: challenge, heartbreak, uncertainty, and Zoom fatigue. But what is also emphasized is resilience; the resilience of individuals, groups, organizations and our entire community.

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, animal welfare, education and disaster relief. This approach to grantmaking continued in 2020, along with specific emergency efforts, including our COVID-19 Relief Fund and Monterey County Fire Relief Fund.

In addition to our many grantmaking programs, the CFMC focused on providing urgently needed grants to support COVID-19 relief efforts, including:

- Emergency food/nutrition programs through many nonprofits such as the Boys & Girls Clubs of Monterey County, Rancho Cielo, The Carmel Foundation, and The Marina Foundation.
- Direct financial assistance to families and those that lost employment due to the pandemic through Palenke Arts, The Village Project, Alisal Education Foundation, Castroville Coalition, City of Gonzales, Arts Council for Monterey County, Community Association of Big Sur and others.
- Programming support to vulnerable populations through California Rural Legal Assistance, CASA of Monterey County, Central Coast YMCA, Loaves, Fishes & Computers, Monterey County Office of Education, Natividad Medical Foundation, Special Kids Connect, United Way Monterey County and more.
- Emergency supplies, including facial masks, sanitizing supplies and emergency medical supplies through nonprofits including Central Coast Visiting Nurses Association, Dentistry 4 Vets and First 5 Monterey County.

The CFMC's Center for Nonprofit Excellence provided capacity building and strengthening programs for nonprofit leaders. A programming highlight was the Diversity, Equity and Inclusion workshop series, which was especially relevant for 2020.

We believe that the best solution to ensure recovery from the effects of the pandemic is to build and strengthen our collaborative skills and promote the health and wellbeing of all residents of Monterey County.

"The Community Foundation added new ways to support our community as we shifted to address the uncertainties and challenges of 2020. We remain committed to collaboration, creativity and solidarity," said Laurel Lee-Alexander, Vice President of Community Impact.



**"WE ARE GRATEFUL TO CFMC DONORS,
PARTNERS AND
NONPROFIT ORGANIZATIONS FOR
HELPING FURTHER A VISION OF
HEALTHY, SAFE, VIBRANT
COMMUNITIES."**

**- Laurel Lee-Alexander, CFMC
Vice President of Community Impact**

IMPACT



Site of Alisal Union Early Learning Center at Buckhorn in Salinas ^

Children & Youth Development - Alisal Union School District, \$30,000 for preschool and programming

Nearly 49% of Salinas children between the ages three and five years old are not enrolled in preschool or kindergarten. A \$30,000 Community Impact grant to the Alisal Union School District will help fund construction of a full-day preschool and after school care for up to 96 students.

The Alisal Union Early Learning Center at Buckhorn will be located near the corner of Buckhorn Street and Falcon Drive in northeast Salinas. The COVID-19 pandemic has slowed progress of the project, but construction will begin in the Fall of 2021.

In addition to education, the center will provide wrap-around services for families providing connections to basic needs related to housing, medical, clothing, food and counseling. Families will also have invitations to family playgroups, parent education, early literacy and more.



Teens are the target of Sun Street Center's anti-drug messaging ^

Health & Human Services - Sun Street Centers, \$50,000 for a two-year grant for prevention programs

Concerns that legalization of marijuana has made its consumption more readily available has propelled Sun Street Centers to increase drug prevention training for youth. A \$50,000 grant over two years is funding their Safe Teens Empowerment Project (STEPS).

"The impacts of legalization of marijuana consumption is still being revealed, but health care professionals are concerned that marijuana is now readily available and young people no longer believe it is particularly harmful," says Anna Foglia, Executive Director.

A California Healthy Kids study found that rates of marijuana use had gone up nearly 10% for students in 11th grade. "We anticipate these rates to climb higher for both adults and teens with the widespread availability of recreational marijuana in Monterey County this year," she said.

Funds will be used for educating students through a peer-leadership/mentor program run in collaboration with middle and high schools throughout Monterey County. In addition, the Monterey County Health Department has requested that the STEPS program provide drugged driving prevention training to 11th graders. Grant funds will pay salaries, community event expenses and training and media purchases.

"THE ALISAL UNION SCHOOL DISTRICT SERVES ONE OF THE MOST VULNERABLE POPULATIONS IN MONTEREY COUNTY, AND THE SUPPORT OF COMMUNITY PARTNERS LIKE THE CFMC IS CRUCIAL IN ORDER TO PROVIDE THE BEST SERVICES POSSIBLE FOR THESE HARD-WORKING FAMILIES."

- Jim Koenig
AUSD Superintendent



Monterey County Pops! taught children music online ^

Arts & Culture - Monterey County Pops!, \$15,000 for Pros Teach Live

A worldwide lockdown did not deter the arts, organizations just got even more creative. Monterey County Pops used a \$15,000 grant to support online education. Accessing its wide network of 800 students – from King City to Salinas and the Monterey Peninsula – Pops! instructors provided interactive Zoom lessons coupled with coaching.

Students were provided three, one-hour clinics in instrument groups of the flute-oboe, clarinet-sax, trumpet-horn, trombone-baritone-tuba or percussion. Monterey County Pops! Pros Teach created eight 1/2-hour recorded lessons that were broadcast on community TV each week as part of an on-air curriculum targeted from elementary to high school students.

Pops! also launched a program for 4th and 5th grade students featuring an introduction course to playing instruments presented by an ensemble of music educators through a hybrid of live Zoom and pre-recorded performance. To access Pros Teach Live, visit: montereycountypops.org/pops-pros-teach.



Catholic Charities of the Diocese of Monterey, here with Congressman Jimmy Panetta, assists people on a path to citizenship ^

Community Development - Catholic Charities of the Diocese of Monterey, \$40,000 for Immigration and Citizenship program

The path to citizenship is one that requires knowledge and support. Catholic Charities of the Diocese of Monterey is a partner in the process, based in Seaside and working immigration cases out of Salinas. A \$50,000 Community Impact grant was used for 400 screenings of Monterey County residents to help them determine how to proceed with their hopes for citizenship. The goal was for 112 individuals to become citizens.

“Hard-working immigrants have a goal to become citizens and be active participants in our communities,” said Ana Ventura-Phares, Catholic Charities Executive Director. “They have been contributing to the important economies of our region – agricultural and hospitality. They yearn to take the next step to citizenship.”

Support included assistance with case management, learning vital U.S. History and Government test questions and preparing for in-person interviews.

“WITH THE CFMC AS OUR PARTNER, OUR WORK TO ASSIST THOSE ON THE PATH TO CITIZENSHIP MEANS NEW OPPORTUNITIES FOR MANY WHO WANT NOTHING MORE BUT TO GIVE BACK AND SEE THEIR FAMILIES PROSPER BECAUSE THEY CAN WITH HARD WORK IN THIS COUNTY.”

– Ana Ventura-Phares

Catholic Charities of the Diocese of Monterey

IMPACT



Monterey Condors Club boosted capacity ^

Organizational Development - Monterey Condors Club Expanded Youth Soccer Offerings

Monterey Condors Club promotes physical activity and healthy lifestyles through youth outdoor recreational soccer. The nonprofit organization “met the moment” during COVID-19, continuing its programs safely while also investing in changes that improved behind the scenes operations.

The Club received an Organizational Development grant through the Center of Nonprofit Excellence to upgrade both their technical and coaching capacity. In adherence to County COVID-19 guidelines, the Club launched its Social Circle Cohorts Program, maintaining maximum health and safety standards. The cohorts began with 12 girls and grew to 70 boys and girls. The organization is on its way to reaching its goal of licensing eight soccer coaches through the U.S. Soccer Federation program with seven coaches completing the Grassroots Online Coaching licensing program so far.

With the support of a newly-developed database and hardware, the Club can track and stay connected with donors, parents, and participants. As a result, both their donors and participants increased. The Club has been able to successfully manage growth with improved systems and increase participation during COVID-19.



Big Sur Land Trust created at-home nature activity kits ^

Environment - Big Sur Land Trust, \$30,000 for Nature at Home

Youth from throughout Monterey County were supposed to get a chance to get their feet wet crossing Big Sur streams and basking in the calming shade of giant Redwoods thanks to Big Sur Land Trust’s (BSLT) summer nature camps. In response to COVID-19, the BSLT brought nature to the homes of nearly 300 participants, primarily youth who weren’t able to gather outdoors.

A \$30,000 grant was used to create and distribute 1,170 at-home nature activity kits, complete with videos to further explore topics and hands-on activities relating to native seeds and plants, birds and the night sky. “For the youth we wanted to connect with, we had to think really carefully how we, with our limited resources, could connect with families with even less resources to create a nature connection without actually bringing youth to our outdoor spaces,” said Ashley Gora, BSLT Development Manager. “It’s not the same, but we did try to create a virtual camp experience, which was important as we were all feeling the impacts of COVID-19 keeping us home.”

Youth participating in future outdoor camps may very well have a way to keep the experience going through virtual camps.

“WE REALIZED WITH THESE AT-HOME KITS THAT BEING ONLINE IS A WAY TO KEEP KIDS CONNECTED BETWEEN CAMP EXPERIENCES. IT DOESN’T HAVE TO BE A SINGLE EXPERIENCE TO CONTINUE THE LOVE FOR NATURE AND FROM THAT, GROWING THEMSELVES.”

- Ashley Gora, Development Manager
Big Sur Land Trust



Donor advisors partnered with the CFMC to make grants to nonprofits, including the Veterans Transition Center ^

Donor Advisor Spotlight - John and Annette Romans

Greenfield resident John Romans and his partners created the Mission Ranches Fund of the CFMC in 2016 to give back to the community. Soon after in 2019, he and his wife Annette created the John and Annette Romans Family Fund for their personal giving. In 2020, they utilized both funds to make grants to the COVID-19 Relief Fund to help those affected by the pandemic.

"We were pleased to support COVID-19 relief efforts through grants from both our personal and business funds. It helped us quickly direct support to where it was most needed," said John.

More recently they made grants to their ongoing interests in South County including the Campaign for the Preservation of Mission San Antonio de Padua, Sun Street Center's new King City Sober Living House and Hartnell College's expansion into King City.

Donor advised funds of the CFMC comprised nearly \$9 million of 2020 grants.



Carmel Gives supported local businesses and nonprofits during COVID-19 ^

Carmel Gives Fund

Carmel Gives was created early in the pandemic as a movement to help local businesses, government, and nonprofits through targeted investment and strategic partnerships. Carmel Gives, a company donor advised fund of the CFMC, was established by Tim Allen Properties (TAP) and since its inception in March of 2020, has raised over \$750,000 from nearly 80 donors. The TAP team donates 5% of all real estate fees towards the fund.

The fund's team went to work connecting with local seamstresses to make over 3,000 cloth facemasks. Next, they focused on supporting local restaurants by raising and granting over \$200,000 to 22 establishments who provided more than 14,000 meals.

The fund also supported meals for surrounding communities through grants to the Carmel Unified School District and the Boys & Girls Clubs of Monterey County, in response to the 2020 fires. Carmel Gives issued a grant to the Monterey Fire Department to purchase and distribute 500 \$50 gift cards to those evacuated and displaced by the fires. In 2020, Carmel Gives executed more than 40 successful projects and contributed nearly \$500,000 to help those impacted by COVID-19 and local wildfires.

**"WE HAVE YOUR BACK AND ARE HERE TO HELP. BY PULLING TOGETHER
AS A COMMUNITY, WE WILL COME OUT OF THIS EVEN STRONGER."**

- Tim Allen

Tim Allen Properties
Carmel Gives Fund

FOUNDING MEMBERS

From 1945 Articles of Incorporation

Frederick R. Bechdolt
 Samuel G. Blythe
 Clyde A. Dorsey
 Anita Doud
 George W. Eckhardt
 Frances Adler Elkins
 S.J. Field
 Dr. James B. Finley
 Martha Sargent Gragg
 Mary L. Greene
 Robert Allen Griffin
 Stuart Haldorn
 Armin Hansen
 W.R. Holman
 W.C. Hudson
 Margaret Jacks
 Andrew B. Jacobsen
 Robinson Jeffers
 Angelo Lucido
 Colonel Harold
 Lewis Mack
 Carmel Martin, Sr.
 Colonel Charles H. Mason
 Emmett McMenamin
 Samuel F.B. Morse
 Martha E. Newcom
 W. M. O'Donnell
 Noel Sullivan
 Maria Antonia Bach
 Thompson
 Edward H. Tickle
 James F. van Loben Sels

1946



1948



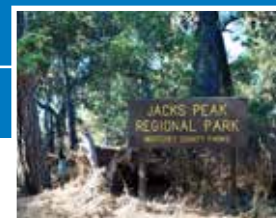
1959



1961



1977



1940s Founding & Historic Preservation

- **March 11, 1945** – Formed as a nonprofit
- **March 26, 1945** – 1st meeting of "Monterey Foundation" established "for acquisition and preservation of historic buildings, landmarks and sites"
- **1946** – 1st building saved – Casa Gutierrez (State of California given title in 1954)
- **1948** – Acquired lot next to California's First Theatre (transferred to State Parks 4 months later)

1950s & 60s Historic Preservation

- **1955** – Received 1.5 acres of Pescadero Point as donation (later donated to Del Monte Forest Foundation)
- **1959** – Casa Abrego purchased (then sold to Casa Abrego Club)
- **1961** – Fremont Adobe purchased
- **1961 & 1966** – Scope broadened to include "general charitable educational, philanthropic, cultural and benevolent purposes"

1970s Renamed & Expanded Focus - Open Space & Broad Charitable Purposes

- **1972** – Renamed "Monterey Peninsula Foundation" serving broad charitable purposes. Began to build permanent endowment
- **1976** – Purchased parcel of land near Cypress Point (Funded by many donors, dedicated as open space memorial to Samuel Morse. Donated in 1982 to Del Monte Forest Foundation)
- **1977** – Contributed funds to create Jacks Peak Park (in partnership with County Parks, Nature Conservancy and others)
- **1978-1979** – Purchased Navajo and Indian Village tracts in Pebble Beach for preservation (donated in 1982 to Del Monte Forest Foundation)

1980s Became "Community Foundation for Monterey County" Grows Endowment, Expands Impact

- **1981** – Hired 1st full-time Executive Director – **Todd Lueders**, \$250,000 endowment (Mewborn Trust of SF Foundation), 1st donor advised fund created – The Murray Fund
- **1983** – William and Flora Hewlett Foundation grants \$1.1 million to endowment
- **1984** – Name changed to "Community Foundation for Monterey County," opened 2nd office in Salinas, expanded grantmaking countywide
- **1988** – Endowment passed \$7 million, record grants \$416,173
- **1989** – Disaster Response – Granted \$10,000 within 48 hours to American Red Cross to assist Loma Prieta earthquake victims

1990s Growing & Granting

- **1991** – Topped \$1 million in annual grantmaking for first time
- **1994** – \$3.8 million planned gift establishes Robert and Virginia Stanton Endowment
- **1995** – Total Grants: \$2,799,180
- **1997** – Neighborhood Grants Program and Management Assistance Program launched (both started with Packard Foundation grants)

2000 – 2007 Initiatives & Growth

- **2002** – The Women's Fund established
- **2003** – \$8.9 million planned gift created Cislini Fund
- **2005** – Launched Literacy Campaign – Fiscal sponsor for Rally! Salinas campaign (\$810,000 raised to keep Salinas libraries open)
- **2006** – Laurelie and J. Irvine Fund created with \$8.6 million gift (termination of private foundation) – \$8.8 million planned gift created John H. Marble Endowment for Monterey Museum of Art
- **2007** – Total Grants: \$7,498,924

2010



2014



2016



2017



2019



2008 – 2009 Strengthening Nonprofits

- **2008** – Community Leadership Project strengthened grassroots organizations led by or that serve people of color and low-income communities (Funded by Irvine, Packard, Hewlett)
- **2009** – First year of Monterey County Gives!
 - LEAD Institute began first cohort
 - \$4.8 million planned gift created Rudy E. Futer Fund for Human and Humane Needs

2010 – 2012 A New Era

- **2010** – Dan Baldwin became 2nd President/CEO, new strategic plan developed
- **2011** – New Mission, Vision and Values statements approved
- **2012** – Exceeded \$100 million in cumulative grants, Girls' Health in Girls' Hands created, Center for Nonprofit Excellence formed
 - Renovated and expanded Salinas office

2013 – 2014 Growing & Granting

- **2013** – Southern Monterey County Foundation launched, Pfeiffer Ridge Fire Fund created
- **2014** – Total Grants: \$11.3 million
 - Total Assets: \$178 million

2015 Community & Philanthropic Leadership

- Strategic plan revised – "Community Leadership" added as 4th pillar
- Women's Fund endowment reached \$1.5 million
- CFMC responded to arson at Food Bank (\$320,000 granted: \$50,000 CFMC + \$270,000 from 35 donor advisors)
- Focused on assisting homeless service providers

2016 – Countywide Impact, the Rise of Scholarships

- Northern Monterey County Foundation launched
- College Futures Monterey County began (needs-based scholarships and support)
- Soberanes Fire Fund raised \$1 million for Big Sur
- Convened affordable housing providers

2017 Engaging Donors, Strengthening Nonprofits

- Big Sur Disaster Relief Fund (More than \$350,000 went to those impacted by Pfeiffer Bridge closure)
- Siembra Latinos Fund launched
- Next Steps for Small Nonprofits (3-year capacity building program)
- \$775,000 in 225 scholarships awarded

2018 Record Grants, Growth & Impact

- The James Irvine Foundation partnered with CFMC to invest \$1.25 million to strengthen Salinas nonprofits
- Community Leadership: affordable housing, homelessness work continued
- Began Community Impact Investment program
- Women's Fund topped \$2.1 million and Neighborhood Grants Program totaled \$1 million in cumulative grantmaking
- Monterey County Gives! surpassed \$5.4 million
- Total Assets: \$248 million

2019 Expansion Continues

- Sale of 3200 17-Mile Drive left by Charles de Guigné created \$18 million fund
- \$1.4 million in 371 scholarships awarded
- Total Granted: \$19 million (surpassed \$200 million cumulative grants)

- Record Total Assets: \$288 million

2020 75th Anniversary Year

- Board approved revised strategic plan with renewed emphasis on diversity and equity
- Creates COVID-19 Relief Fund and granted \$3.4 million
- Community Fund for Carmel Valley launched
- Established Monterey County Fire Relief Fund
- Established and led COVID-19 Collaborative, a countywide, multi-sector response to the pandemic
- Expanded Fund for Monterey County
- Monterey County Gives! surpassed \$7.8 million
- Record Grants: \$27 million
- Record Total Assets: \$347 million

2021 ... Here for Good.



The Community Foundation is
"HERE FOR GOOD."

- Teri Belli

2021-22 CFMC Board Chair

COMMUNITY LEADERSHIP

Community leadership became especially important in 2020. While the historical timeline on pages 20-21 shows the evolution of the Community Foundation for Monterey County over the past 75 years, the threats of a global pandemic and wildfires – both in the same year – were unprecedented.

Because of the CFMC's experience with disaster response for the Pfeiffer Ridge, Tassajara and Soberanes fires, the foundation was able to quickly coordinate the philanthropic response to these threats. The COVID-19 Relief Fund and the Monterey County Fire Relief Fund were rapidly established and able to reach those most in need.

Regular grantmaking continued, and there was a tremendous response to the Monterey County Gives! campaign, raising \$7.9 million to strengthen local nonprofits and support their work. (See page 9)

The Community Foundation again demonstrated its leadership by stating the foundation's values around diversity, equity and inclusion in response to the racial justice outcry after the murder of George Floyd. (See page 13) By utilizing Community Impact investment the foundation was able to support local businesses owned by people of color and leverage \$1 million in additional support. (See page 27)



The Community Foundation is an
**“ANCHOR ORGANIZATION
AND COMMUNITY LEADER.”**

- Laurel Lee-Alexander
CFMC Vice President of
Community Impact

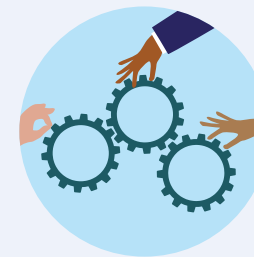
Perhaps the most visible example of the foundation's role took place in November 2020, when the CFMC convened local stakeholders to coordinate efforts around the COVID-19 response. Dan Baldwin was asked to lead the COVID-19 Collaborative to help reduce the impact of the virus in Monterey County. (See page 23)

Thanks to the power of local philanthropy, the Community Foundation for Monterey County will be able to rise to the challenge of meeting changing needs, now and in the future.



“IN ADDITION TO GRANTMAKING,
THE COMMUNITY FOUNDATION
BRINGS PEOPLE AND RESOURCES
TOGETHER TO ADDRESS IMPORTANT
COMMUNITY ISSUES.”

- Dan Baldwin
CFMC President/CEO



COVID-19 COLLABORATIVE

The COVID-19 Collaborative began in November 2020 when a group of 85 stakeholders held an online meeting. The goal was to better align and coordinate pandemic response efforts and communication.

This countywide, multi-sector group brought together Monterey County, cities, agriculture, hospitality, education, healthcare, community-based organizations and philanthropy to lower the spread of COVID-19. CFMC President/CEO Dan Baldwin was asked to lead the group, which holds regular meetings to coordinate efforts.

The CFMC enlisted consultants from the Consensus Building Institute to facilitate the process. The Collaborative created workgroups to best utilize its members' skills: Outreach & Support, Science & Best Practices, Resources & Funding, Testing and Communications.

The Collaborative has a particular focus on the most highly impacted areas. The VIDA program was funded with \$4.9 million approved by the Monterey County Board of Supervisors. The CFMC regranted the money to facilitate the program, which hires and equips community health workers who educate and share resources with those most impacted.

The David and Lucile Packard Foundation and Together Toward Health, a program of the Public Health Institute provided significant financial support. The goal is to further the group's efforts to alleviate COVID-19 cases in the hardest hit communities and facilitate equitable vaccine distribution.



● ● ●

“WE’RE HONORED TO LEAD THIS INITIATIVE FOR IMPROVED RESULTS ACROSS ALL OF MONTEREY COUNTY. BY ALIGNING OUR EFFORTS, WE ARE HELPING PEOPLE AND BUSINESSES RECOVER FROM THE PANDEMIC. WE ARE ALL IN THIS TOGETHER.”

– Dan Baldwin
CFMC President/CEO

● ● ●



EMPOWERING WOMEN AND GIRLS

Dreams and ambition were not sidelined in 2020 when more than 350 supporters of the Women's Fund came together online in May to raise \$50,000 for scholarships for women and girls. Due to the pandemic, the annual Women's Fund "Luncheon" was held virtually, allowing supporters to connect and enjoy the program from the comfort of their homes.

Speaker Noni Allwood spoke about "Courageous Leadership through Difficult Transitions." The event was recorded and available online at cfmco.org/womensfund. Thanks to the support of Women's Fund donors and sponsors, \$54,000 was granted in 29 scholarships. A total of \$347,000 has been awarded through 180 scholarships from 2016-2020.

The Women's Fund allocated COVID-19 relief emergency assistance for women attending Monterey Peninsula College and Hartnell Community College, sent three women to the Women's Policy Institute (online) to build advocacy skills, educated students about human trafficking through Rising International's Safe and Sound Program and supported girls' leaderships through Girls' Health in Girls' Hands (GHGH). GHGH is an initiative created by the Women's Fund that empowers local girls. Coordinated by the Boys and Girls Clubs of Monterey County, it is comprised of six nonprofit organizations working together for greater impact.

More than \$2.2 million has been granted to organizations improving the lives of women and girls in Monterey County since 2013.

"THE WOMEN'S FUND OF MONTEREY COUNTY IS A RESOURCE, AN ADVOCATE AND PHILANTHROPIC PARTNER THAT PLAYS A CRITICAL ROLE IN GENDER EQUITY AND GIVING WOMEN A VOICE IN MONTEREY COUNTY."

- Christine Dawson

CFMC Vice President of Philanthropic Services

CREATING OPPORTUNITY

Scholarships

Gabino Guzman Losoya didn't have anyone in his family to ask about what college was like or if it was for him. His parents, immigrants from Mexico, his aunts and uncles – none had the chance to finish high school. The Soledad student turned to a friend who told him about a summer program to learn if maybe, just maybe, college was a possibility.

"College was new to us all – we were all in the same boat, first generation students, but we got comfortable knowing we were in the same situation and we could do this," said Losoya, looking back on his first exposure to higher education.

Now, the 19 year old can say it's definitely for him. Thanks to participation in the Community Foundation's College Futures Monterey County, Losoya graduated Soledad High School with a scholarship and knowledge about what he and his family could expect.

"Specifically, the program helped me learn about the costs, housing and financial aid. It gave me the opportunity to learn about all these things I did not know about because I had no one who had gone through it," he said, adding his parents attended a class as well. "It was College Futures that strengthened my confidence as a first-generation college student."

Losoya did his part, taking four AP classes, two college courses, 200 hours of community service (40 were required) and participated in ROTC. He enrolled in Hartnell Community College, and is happy to report that despite distance learning because of COVID-19, he earned straight As. He has set his sights on attending medical school with the goal of becoming a psychiatrist to help Latinos overcome hesitancy about seeking help for mental health issues.

College Futures Monterey County is designed to help low-income students in Monterey County achieve their educational and career goals. It combines need-based scholarships with college readiness services to help students get to and through the college of their choice. The CFMC partners with California State University, Monterey Bay to expand college support services to more students in local high schools with the greatest need.

The CFMC manages more than 60 named scholarship funds, with a total value of more than \$8.2 million. Each year, these funds award over \$1,800,000 for the benefit of about 375 students.



**"FOR ME, THE SCHOLARSHIP IS
SUPPORTING ME BOTH PHYSICALLY
AND MENTALLY, GIVING ME
THE FINANCIAL AID REQUIRED
TO SUCCEED IN MY
COLLEGE COURSES."**

- Gabino Guzman Losoya



19

emerging nonprofit
leaders participated
in LEAD Institute

196

organizations engaged
with CNE overall

262

workshop attendees
(173% increase)

16

nonprofits
attended DEI training
and many more
accessed online resources

8

Organizational Development
grants

As local nonprofits pulled off epic shifts and adjustments during 2020, the Center for Nonprofit Excellence (CNE) was there. CNE's signature program, the LEAD Institute, shifted to a virtual format, with 19 emerging nonprofit leaders participating. They accessed virtual learning, plus one-on-one coaching and peer support during a time of pain from racial injustice, loss, fatigue and profound community need. There was space for difficult conversations and adjustments within the Institute to meet the moment.

Calls for racial justice catalyzed many in our nonprofit community to look for ways to act. Nonprofits are also part of systems and historic frameworks that perpetuate inequities, and these can stand in the way of achieving our missions. From July-December, teams from 16 nonprofits turned to CNE's Diversity, Equity and Inclusion

(DEI) for Nonprofits training program over Zoom. Presenters from National Coalition Building Institute (NCBI) offered historical information and a productive space to develop a shared understanding of these concepts.

Discussions, resources and learning exercises were valuable; as one participant remarked, "we plan to share what we've learned with the team and continue creating an internal environment that supports DEI work." Some groups went on to apply for and receive Organizational Development grants from the Community Foundation to continue their efforts.

196 nonprofits engaged with CNE overall, a 173% increase in workshop participation over the previous year.

**"I MADE SOME STRONG CONNECTIONS AND WAS ABLE TO WORK
COLLABORATIVELY WITH SOME OF THE CNE ATTENDEES, AFTER HAVING
MET THEM IN THE ZOOM LUNCHES."**

- Local Executive Director

COMMUNITY IMPACT INVESTING

The CFMC aims to reduce barriers faced by entrepreneurs of color so they can create, expand and sustain their businesses. This effort includes strengthening the small business development ecosystem to ensure that existing businesses gain access to the capital, training programs and services that they need to succeed.

The CFMC partnered with California Coastal Rural Development Corporation (Cal Coastal) and El Pájaro Community Development Corporation's (El Pájaro CDC) with a \$1 million investment for each organization through its Community Impact Investing program. Community impact investing is a mission-driven placement of capital designed to bring a return to the organization while creating community benefit.

While some organizations closed programs, reduced staff, or ended services all together, Cal Coastal and El Pájaro CDC community development financial institutions (CDFIs) were able to pivot to online services to meet their mission and expand services, including providing PPP funding.

The James Irvine Foundation Invests \$1 Million to Expand Support for Small Businesses

The James Irvine Foundation granted \$1 million to the CFMC to support a revolving micro-loan and entrepreneurship training program for low-income entrepreneurs of color in Salinas. This partnership will grow family-sustaining jobs and businesses.



Community Impact loan recipient Mercedes Flores, owner of Los Padrinos in East Salinas

This follows \$1.25 million granted in 2019 by The James Irvine Foundation to the CFMC to build civic engagement and leadership in Salinas.

Working to expand economic opportunities for Salinas residents complements the CFMC's existing support for nonprofit organizations working in Salinas and provides opportunities for a more focused and integrated approach.

Cal Coastal Loan Recipient XL Public House



EXPANDING IMPACT

“WE RECEIVED A LOAN FROM CAL COASTAL UNDER THE SALINAS MICROLOAN AND ENTREPRENEUR TRAINING PROJECT THAT HELPED US SURVIVE AND NAVIGATE OUR BUSINESS THROUGH THE COVID-19 PANDEMIC.”

- Oscar Alcala

XL Public House Owner

FUND FOR MONTEREY COUNTY

The Fund for Monterey County responds to the changing needs of our community. The Fund, formerly known as the General Endowment, is a permanent fund of the CFMC, which is invested to grow and grant in perpetuity.

Because the Fund for Monterey County is the combination of endowed unrestricted and field-of-interest funds, grants support a wide variety of causes each year. Areas include: Children & Youth Development, Health & Human Services, Community Development, Arts, Culture & Historic Preservation, and the Environment & Animal Welfare. Grants are reviewed and allocated through the Community Impact grant program, which addresses community needs and challenges in Monterey County. The Fund also provides resources for emerging needs, such as the COVID-19 pandemic response and emergency disaster relief.

Unrestricted gifts provide the philanthropic resources to meet current and future challenges. Donors can designate the Fund for Monterey County as a beneficiary of a will or trust. The CFMC can provide you or your attorney with sample bequest language. Donors can also give directly to the Fund for Monterey County or name the Fund as the beneficiary of a donor advised fund.

Bertie Elliott, a long time CFMC donor advised fund holder and former board chair, has designated the Fund for Monterey County as a partial beneficiary of her donor advised fund. She appreciates that the Fund for Monterey County is invested to grow over time and will forever benefit the people and places of Monterey County. "I included the Fund for Monterey County in my giving because I feel good knowing the fund will meet the needs of our community, even as they change," said Bertie.

Gifts to the fund create a source of community capital, helping to do good work forever. Grants from the Fund for Monterey County surpass \$2 million each year. Growing the Fund for Monterey County creates more grant resources to meet changing needs now and in the future. We are grateful for all those who have invested in the future of Monterey County by including the Fund in their estate plans.

WAYS TO GIVE ● ● ●

- Bequest
- Charitable Remainder Trust
- Charitable Gift Annuity
- Real Estate
- Appreciated Stock
- IRA Qualified Charitable Distribution (QCD)
- Cash
- Donor Advised Fund Grant

Your gift will make an important difference.

To learn more please call 831.375.9712 or visit cfmco.org/WaystoGive.



The Community Foundation is
"TRUST."
- Bertie Elliott

◀ (from top) Salud Para la Gente, Boys & Girls Clubs of Monterey County, Meals on Wheels of the Salinas Valley, Peace of Mind Dog Rescue

• cfmco.org/FundforMontereyCounty

MAKING A LOCAL IMPACT

Steve and Ann Packer

Ann was born in Syracuse, NY and moved to California in the 1970s. She met Steve, born and raised in San Diego, while she was a paralegal in San Francisco and he was in medical school at UCSF. They married in 1985, the same year they moved to Monterey for Steve's pulmonary and critical care practice at Community Hospital of the Monterey Peninsula (CHOMP). He became CHOMP's President/CEO in 1999. The couple gives back to the community through their donor advised fund at the CFMC.

They like to concentrate their giving on local causes, with a focus on health and human services such as Food Bank for Monterey County, Gathering for Women, MPC, CSUMB and CHOMP. "We feel that investing in local nonprofit groups will have the greatest impact," says Steve.

"Your philanthropy represents your values. Donations to nonprofits help make your values visible," notes Ann.

Steve and Ann have ongoing conversations about philanthropy with their two grown sons and their wives. Each year as a family they discuss which issues or organizations they want to give to. Their fund is aptly named The Packer Family Foundation.

They created the fund in 2019, after watching the Community Foundation grow over several years. Steve appreciates the expertise of those serving on the CFMC's investment committee. They both like the fact that their DAF gives them control of their giving and is a convenient way to donate appreciated stock. "We enjoy the access to staff, the online portal and ability to give easily to our favorite nonprofits," says Ann.

Like their parents before them, who were volunteers with a strong sense of service, the Packers also give back through service on nonprofit boards. Ann served on multiple boards including the Action Council, Congregation Beth Israel and is a committee member for Women's Forum for Health at CHOMP. She is now President of the board of Gathering for Women, while Steve serves on the Board of the Stevenson School and the Foundation board for CSUMB.

They believe that, "if you're fortunate enough to be able to help others you should do it. It's the right thing to do."



“IF YOU’RE FORTUNATE
ENOUGH TO BE ABLE
TO HELP OTHERS
YOU SHOULD DO IT.
IT’S THE RIGHT
THING TO DO.”

– Steve and Ann Packer
The Packer Family Foundation

OUR FAMILY OF FUNDS

The CFMC holds over 600 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 that are distributed to community organizations serving a specific region.

Community Fund for Carmel Valley*

Northern Monterey County Foundation

Southern Monterey County Foundation

Agency Endowment Funds

Nonprofit agencies benefit from participation in the CFMC's investment pools, help with planned giving, and improved 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 - Children's Fund

Carmel Public Library Foundation Fund

Carmel Woman's Club Fund Carmel Woman's Club Scholarship Endowment 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 Salvation Army Monterey Peninsula Fund

Friends of the Carmel Valley Library Fund

Girl Scouts of California's Central Coast Endowment Fund

Goodwill Industries of Santa Cruz, Monterey and San Luis Obispo Counties Fund

Mayor Joe Gunter Memorial Fund for the Veterans Day Parade*

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

Meals on Wheels of Salinas, Inc. Fund

Eve Mills Memorial Fund for Meals on Wheels Salinas Valley

Monterey County Historical Society Fund

Monterey History and Art Association Endowment Fund

Monterey Museum of Art Fund Monterey Public Library 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

Sylvia W. Schwarz Endowment for Reading Improvement at Tularcitos School

"I'M PROUD TO SERVE ON THE BOARD OF THE CFMC BECAUSE OF ITS COMMITMENT TO BRIDGE BUILDING, DIVERSITY AND INCLUSION. IT'S WHERE MY HUSBAND AND I CHOOSE TO BE DONOR ADVISED FUND HOLDERS AND A PLACE FOR LEARNING HOW TO GROW AS PHILANTHROPISTS."

- Maija West, Maija, Eva and Cody West Family Fund

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
Valley of the Moon Legacy Endowment Fund*
 Ventana Trails Forever Fund
 Ventana Wilderness Alliance Fund
 Ventana Wildlife Society Fund
 The Western Stage Endowment Fund
 York School Fund
 Youth in Wilderness Fund
Agency Stewardship Funds
Agencies benefit from participation in the CFMC's investment portfolios, and maintain access to the fund's principal.
 1984 Fund
 Pacific Grove Public Library Fund for the Future
 Big Sur Health Center Stewardship Fund
 Big Sur Land Trust Carmel River FREE Stewardship Fund
Carmel Cares Fund**
 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
 Central Coast VNA and Hospice, Inc. Stewardship Fund
 Visiting Nurses Association and Hospice Stewardship Fund II
 CCVNA Stewardship Fund III
 Stewardship Fund for the Center for Photographic Arts
 Central Coast Center for Independent Living Stewardship Fund

Central Coast Veterans Cemetery Foundation Stewardship Fund
 Central Coast Young Men's Christian Association Stewardship Fund
 Chamber Music Monterey Bay Stewardship Fund
 CHISPA Stewardship Fund
 Church in the Forest Fund for the Future
 Community Human Services Stewardship Fund
 Conservancy for the Range of the Condor Stewardship Fund
 Del Monte Forest Conservancy Fund
Early Childhood Equity Stewardship Fund*
 Friends of the Andy Ausonio Library Stewardship Fund
 Friends of Carmel Forest Stewardship Fund
 Friends of the Carmel Valley Library Stewardship Fund
 Friends of the Marina Library Stewardship Fund
 Friends of Sunset Foundation 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
Laguna Seca Raceway Foundation Stewardship Fund**
 LandWatch Monterey County Stewardship Fund
 Learning Opportunities Endowment Fund for Scottish Fiddlers of California

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
 Monterey County Rape Crisis Center Stewardship Fund
Monterey Sober Living for Women Home Purchase Fund**
 Museum Foundation of Pacific Grove Stewardship Fund
 Pacific Grove Public Library Foundation Fund
 Park It! Stewardship Fund
 Peace of Mind Dog Rescue Stewardship Fund
 Rancho Cielo Youth Stewardship Fund
 Maury Richmond Scholarship Stewardship Fund
 Salinas Valley Memorial Hospital Foundation Stewardship Fund
 Shelter Outreach Plus Stewardship Fund
 Sarah Spencer Seed Money Fund for the Center for Photographic Art
 Sun Street Centers' Anne C. Leach Scholarship Fund
 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
 Youth Music Monterey Stewardship Fund
Company Funds
Businesses simplify their giving and receive tax advantages and customized support to maximize their community philanthropy.
 Belli Architectural Group Scholarship Fund
 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
Sea Haven Fund*
Sharon Heights Golf and Country Club Employee 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
Joseph and Betty Chaffers Fund**
 Cislini Fund
 Howard and Lynn Classen Endowment
Communities for Sustainable Monterey County*
 Charles Auguste de Guigné Charitable Foundation
 Frances Elgan & Werner Kunkel Fund
 Howard W. and Elva M. Elliott Trust Fund
Equal Access Monterey Bay**
 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
Montage Health Support Fund at the Community Foundation for Monterey County*
 Monterey County Symphony Association Fund
 Joyce Morris Fund
 Margaret L. Musser Restricted Fund
 F. Robert Nunes Family Fund
 Perry-Downer House Fund
Teacher Pathway Fund: CSUMB*
Teacher Pathway Fund: Hartnell College*
 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
Anonymous Fund (2)*
 Anonymous Donor Temporary
 Zekai and Carolyn Akcan Fund
 Amy Anderson and George Somero Fund
 Antle Family Fund
 Rick and Tonya Antle Fund
 Joey & Dewitt Astin Memorial Fund
 Ausonio Family Fund
 Dan Baldwin and Anne Ylvisaker Fund

FAMILY OF FUNDS

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
Mads and Susan Bjerre Charitable 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
Dale and Margaret Byrne Family Fund**
 California Rodeo Salinas Fund
Carmel Gives Fund*
 Chappellet Youth, Arts, and Ecology Fund
 Chris's Fund
 Colleagues of the Arts Endowment Fund
 Cormorant Fund
 Scott Corwon Fund
 Andrew & Phyllis D'Arrigo
 D'Arrigo-Martin Fund
 Stephen V. Davies Family Fund
 Donald McEnry Davis Charitable Fund
 Eric and Ila Davis Fund
 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
Dooling Family Fund*
 Doolittle Fund
 Jean and Jim Duff Fund
 Davis Factor, Jr. and Christine B. Factor Fund

Davis Factor, Jr. Fund #2
Engstrom and West Fund**
 Farrell/Allen Carmel Rotary Fund
 Farrell/Allen/LaSalle Carmel Rotary Fund
 Doris Parker Fee Fund
 Doris Parker Fee Fund (Endowed)
 Ted Fehring Family/Carmel Host Lions Club Fund
 Ted Fehring Family/Carmel Host Lions Club Fund (Endowed)
 Jose F. Fernandez Fund
 Anne R. Fitzpatrick Foundation Fund
 Lori and Lou Flagg Memorial Youth Fund
 Franklin Legacy Fund
 Friends of Community Animal Services Fund
Friends of Sunset Donor Advised Fund**
 Fuhs Family Foundation Fund
 Fund for the Salinas Valley
 Fuqua Family Foundation Fund
John and Laura Gamble Family Fund**
 The Joel and Dena Gambord Fund
 Gerosin Fund
Gaver Family Fund**
Jim and Barb Gianelli Fund*
Tracy Gibbons Charitable 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
Richard Hamilton and Debra Schadeck Charitable 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
Tom Hopkins Wildemess Fund*
 David G. Huey and Carla S. Hudson Family Fund
 Hughes-Rivera Family Fund
 Huth Family Fund
Ann and Brian Jacobson Charitable Fund*
 Janzen Family Fund
 Birt and Kathleen Johnson, Jr. Fund
Victor and Lynda Johnson Family Fund**
 Colburn and Alana Jones Foundation
Karen Judkins and Steven Wade Fund*
 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
Frank and Michelle Knight Family Fund*
 Kobrinsky 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
Love Our Central Coast Feed the Homeless 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 (Endowed)
 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 (Endowed)
 Malcolm and Joanne Millard Fund
 Clint and Karen Miller Charitable Fund
 Mills Family Fund
 Tim and Cindy Minor Charitable Giving Fund
 William and Patricia Monahan Fund
 Monterey Firemen's Charitable Association Fund
 Monterey Peninsula Sunrise Rotary Club Fund
Lawrence and Carleton Mowell Fund*
 Anthony and Lary Lynn Muller Fund
 Joan Ann Nattress - Movement, Exercise, Longevity Fund
 Martin Needler and Jan Black Fund
 Neidel Family Fund
 Gilbert M. Neill Math Fund
 Neumeier Taylor Foundation Fund
 Nonella Family Fund
Noorani Family Fund*
 Don Nucci Fund for the Salinas Valley
 Oak Hill Charitable Fund
O'Brien Family Fund**
 Mike and Mary Orradre Fund
 Overett Family Fund
 Packer Family Foundation
 Pagnillo Family Fund
 Nicholas M. Pasculli Fund
Bill and Rita Patterson Foundation Fund*
Pfeiffer Ridge Fund*
 Reed Family Fund
 Reese Family Fund
 John and Annette Romans Family Fund

Rotary Club of Monterey, Cannery Row Fund
 The Fred Rowden Memorial Fund
 RSH Fund
Ryan Family Fund**
 Salinas Rodeo Rotary Club Fund
 Salinas Rotary Club Fund
 Salinas Steinbeck Rotary Club Fund
 The James M. Shade Memorial Fund
 Shelley Family Fund
 Ramsey Shirk Fund
 Richard and Cindy Zoller Silver Family Legacy Fund
 Matthew Simis and Michael Gray Fund
 Laura Sinks Fund
 Smith Family Alliance Fund
 Andy and Steffanie Smith Fund
Dr. Catherine L. Smith Charitable Fund*
Steve and Gail Snodgrass Charitable Fund**
 The Snorf Fund
 Cynthia Snorf Fund
 Steck Family Fund
 Struve Family Fund
James W. Sullivan and Catherine Brennan 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
 Vallentin Fund
 Vanderbilt Charitable Fund
Gabrielle Andrea Walters Fund**
 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
Yoga For All Movement Fund*
Zalan 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 (Endowed)

Terry Layne Fund for Beach Protection

Kathleen and Howard Marks Fund

Monterey County Tolerance and Acceptance 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

Irving 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 and Sam-Kih Thorngate Family Fund

Tri-Counties Blood Bank Fund

Anita Tarr Turk Fund for Breast Cancer Research

Women's Fund Endowment

Youth Fund

Fund for Monterey County

These funds comprise the Fund for Monterey County and provide field of interest and unrestricted philanthropic resources for community grantmaking.

Kathleen and Austin Barrows Fund

Wendy (Millard) Benjamin Fund

Nancy Jane Bletzer Fund**

Nancy Jane Bletzer Fund for Animal Welfare**

CFMC Trustees Fund

Cislini Fund

Leland Edmund Dake and Gloria Urban Dake Fund

Mary Jane Drummond Fund

Lewis and Gloria Fenton Fund

Fund for the 21st Century

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

General Endowment - Opportunity Fund

Paul Edward and Gay Delores

Rochester Fund

The Donna Roop Endowment Fund

The Scott Fund

Renita K. Seibel Fund

Clyn & Pamela Smith Fund

Evelyn Torras 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 James Irvine Foundation Micro-Loan Fund*

The James Irvine Foundation Salinas Leadership Fund

The Morse Foundation Scholarship Fund

The Morse Foundation Stewardship Fund

The David and Lucile Packard Foundation Fund

Robert and Florence Slinger Fund

S.T.A.R. Foundation of Monterey County Stewardship Fund

The Alexander F. Victor Foundation

Scholarship & Award Funds

Donors invest in the future of local students.

Monica Abbott Scholarship Fund

AGB Scholarship 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

The Bissell Fund

James Bliss & Annette Sward

Forestry & Nursing Scholarship Fund

The Nan Borreson and Fred Terman

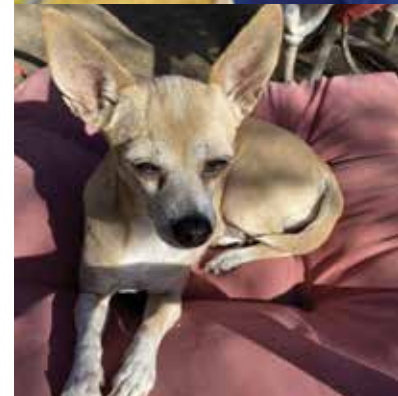
Scholarship Fund

Margaret and Seba Bronson

Scholarship Fund

Carol C. W. Butterfield Bacon

Scholarship Fund



“THANK YOU SO MUCH FOR THE TREMENDOUS SUPPORT PROVIDED BY CFMC DONORS! WE ARE HUMBLLED AND OUR HEARTS ARE FILLED WITH GRATITUDE FOR SUCH GENEROSITY.”

- Kimberly Willison, Director of Development
The Carmel Foundation

(from top) Kitchen Table Advisors, Max's Helping Paws, Love Our Central Coast volunteers



See video: cfmco.org/75years

The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship Fund
California Polytechnic State University Agriculture Business Department Endowment Fund

California Rodeo Salinas Scholarship Fund**

Carmel High School Class of 1952 Fund
Carmel Valley Women's Club Foundation Scholarship Fund
CASA of Monterey County Scholarship Fund

Caste Action Alliance 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

Emerging Leaders Society of United Way Monterey County Scholarship Fund*

David L. Ferguson Scholarship Fund
Matthew Paul Finnigan Memorial Scholarship Fund
Flagg Scholarship Holding Fund

Nancy Fowler Memorial Music Scholarship Fund**

FW Family Scholarship Fund**
Gabilan Hope Scholarship Fund

Joel and Dena Gambord Nursing Scholarship
Girls' Health in Girls' Hands Scholarship Fund

Richard Gourley Memorial 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
Ipson-Tully Cal Memorial Scholarship Fund
Elke Junger Making a Difference Fund
Kier Memorial Scholarship Fund
George V. Kriste Scholarship Fund
Howard and Gretchen Leach 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
Casilda Paul Memorial Scholarship Fund*
Richard Scott Reynolds Science and Technology Education Scholarship Fund
Rotary Club of Monterey Martin/Hurd Scholarship Fund
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

Smith Family 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 urgent needs.

Alert Monterey County Fund
Big Sur Disaster Relief Fund
Weston Call Fund for Big Sur Casa Amesti Garden and House Fund

Casa de Noche Buena Special Purpose Fund*

Census 2020 - VCCF & State of CA
Census 2020 Fund
Center for Nonprofit Excellence

COVID-19 Collaborative

Community Health Workers**
COVID-19 Relief Fund*
COVID-19 Public Health Institute*
COVID-19 Collaborative Packard Funding**

King City Recreation Commission
Forden Park Playground Fund
Rudolph E. Futer Restricted Purpose Fund
Monterey County Development Professionals Fund

Monterey County Fire Relief Fund*

Monterey County Gives!
Monterey Peninsula Small Business Relief Fund*
Pathways to Safety
Rudy Futer Pony Trust

***New Fund Created in 2020**

**** New Fund created in 2021**

“THE COMMUNITY FOUNDATION IS PROFESSIONAL AND THEY ARE FANTASTIC. WE ARE CONFIDENT THEY WILL CARRY OUT OUR CHARITABLE LEGACY IN THE FUTURE.”

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

LEGACY SOCIETY

Leaving a legacy through a planned gift is a meaningful way to make a lasting impact. You can express your values through thoughtful estate planning now, and have the peace of mind that the causes you care about will be supported in the future. We are thankful to those who have made this important decision.



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
Nataasha M. Doner
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*
Lowell I. Figen*
Cyrus and Jean
Fitton*
Anne R. Fitzpatrick
Crawford E. and
Linda P. Foy
Susie and Charly
Franklin
Joan M. Franz
John and Laura
Gamble
Joel S. and Dena
Gambord
James and Jeri Gattis
Donald* and Frances
Gaver
Kevin Gilman
Lupe Gomez*
Rodney Guilfoill*

Terry Haber*
Bernard E. Hanly
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 Hobbey 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
William Kampe
Mary Ann Kane
Rick and Martha
Kennifer
Capt. Steven D.
Kesseling and Jean
M. Forrest
Alice V. Kinsler
Paul Lawrence* and
Marian Buccafurni
Douglas C. Lee
Laurel Lee-Alexander
Jennifer Levey
Jack and Angeleke
Levy Trust
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
Gary and Diane
Nelson
Vicki Nelson
Diane R. Nonella
F. Robert Nunes*
Daniel O'Brien
Alfred P. Oliverio
Charles Olvis and
Miranda Morris
Mike and Mary
Orradre
Nicholas M. and
Nicollette 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*
Kenneth C. Schley
Steven Paul Schmidt
Maria Salazar Segovia
Carol Shade*
JeriAnn Shapiro*
Connie Shelstad
Robert B. Sheppard*
Mimi Sheridan
Janet L. Shing
Laura Sinks
Mary Skipwith
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
Larry Tartaglino
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*
Jan Vanderbilt
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 Zahm*

*In Memoriam

2020 Legacy Society
Luncheon (prior to
shelter in place) ^

Becoming a Legacy Society Member

The Legacy Society honors those who have chosen to partner with the CFMC through their estate. If you have included the CFMC in your estate, please contact us so we may acknowledge your generosity. While we recognize those who have notified us of their plans, Legacy Society members may also choose to remain anonymous. We will work with you and your professional advisor to create the best solution for you and lasting benefit for others.

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)
- Gift of Life Insurance
- Designate the CFMC as beneficiary of a Retirement Plan or IRA
- Create an Endowed Fund (or contribute \$25,000 or more to an endowed fund)

Please give Christine Dawson or Andrea Scott a call at 831.375.9712. We would be honored to assist you in your legacy planning.

FINANCIALS

COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2020

Additions

Contributions*	38,920,084
Other income	456,961

Total revenues and support **39,377,045**

Investment gain	30,691,624
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Grants and expenses

Grants*	24,835,981
Other operating expenses	3,687,524

Total grants and expenses **28,523,505**

Increase in net assets	41,545,164
------------------------	------------

Net assets

Beginning of year	230,383,948
-------------------	-------------

End of Year **\$271,929,112**

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

CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2020

Assets

Cash and equivalents	\$19,160,061
Contributions receivable	283,909
Other assets	7,345
Property and equipment, net	3,705,150
Investments, carried at market value: Mutual funds and equities	285,981,832
Cash and money market funds	8,886,106
Charitable gift annuities	4,380,833
Beneficial interest in remainder trusts administered by other trustees	889,929
Investments held in charitable remainder trusts	24,364,029

Total assets **347,659,194**

Liabilities and net assets

Grants payable	1,498,437
Accounts payable and accrued expenses	202,943
Refundable advance	411,402
Liabilities under split-interest agreements and charitable remainder trusts	17,337,817
Funds held for others	56,279,483

Total liabilities **75,730,082**

Total net assets **\$271,929,112**

**This includes \$1,750,000 of programmatic loans

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

The CFMC is confirmed in compliance with National Standards for U.S. Community Foundations.



2020 FAST FACTS

\$27.1 MILLION

Grants

\$57 MILLION

Gifts

\$347 MILLION

Total Assets

594

Charitable Funds

11.7% Long Term

13.1% Medium Term

12.1% ESG

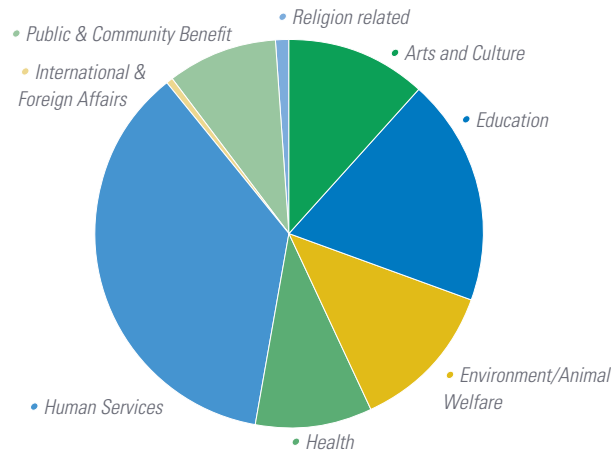
Investment Returns



GRANTS: \$27 Million Granted

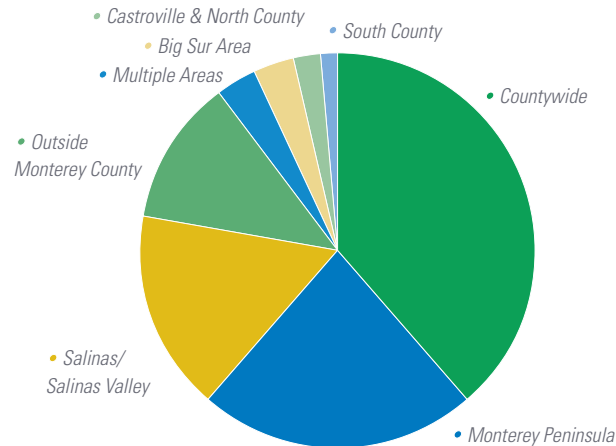
Grants by Program Area

Human Services	9,878,500
Education	5,107,836
Environment/Animal Welfare	3,402,342
Arts and Culture	3,193,160
Health (Individual & Community)	2,692,161
Public & Community Benefit	2,474,729
Religion related	300,925
International & Foreign Affairs	97,904
Total	\$27,147,557



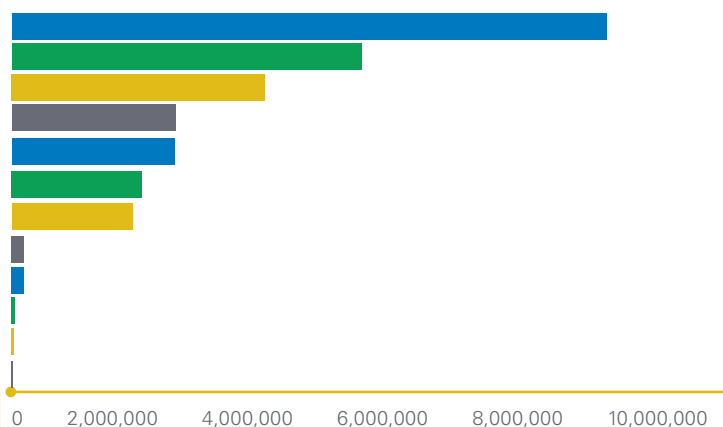
Grants by Region

Countywide	10,488,296
Monterey Peninsula	6,183,676
Salinas/Salinas Valley	4,466,294
Outside Monterey County	3,224,387
Multiple Areas	963,278
Big Sur Area	862,126
Castroville & North County	601,357
South County	358,144
Total	\$27,147,557



Grants by Type

Donor Advised	8,028,710
MC Gives! Campaign	5,252,601
Discretionary	3,798,833
Restricted Fund	3,388,520
Community Impact	2,444,289
Special Project	1,951,537
Scholarships & Awards	1,800,319
Pass Thru/Temporary	188,796
Affiliate Fund	184,750
Organizational Development	54,700
Opportunity	35,000
Neighborhood Grants	19,500
Total	\$27,147,557



“KINSHIP CENTER IS IMMENSELY GRATEFUL TO THE COMMUNITY FOUNDATION FOR ITS GRANT IN SUPPORT OF OUR EMERGENCY FUND. THOSE FUNDS HAVE BEEN ENTIRELY EXPENDED IN SUPPORT OF SOME OF THE FAMILIES MADE MOST VULNERABLE BY COVID-19.”

- Julie Saxby

Development & Strategic Engagement,
Kinship Center



▲ (l to r) Teri Belli, Betsy Buchalter Adler, Jan Vanderbilt, Maija West, Kirk Gafill, Romero Jalomo, Elsa Mendoza Jimenez, Birt Johnson, Jr., Nolan Kennedy, Judy Guzman Krueger, Giff Lehman, Adriana Melgoza, Fred Meurer, Betsey Pearson, Joe Pezzini, Francine Rodd, Bill Sharpe, Loren Steck, Abby Taylor-Silva, Jennifer L. Walker

BOARD

Teri Belli (Chair), Belli Architectural Group
Betsy Buchalter Adler (Vice Chair), Retired trustee and program officer, Claire Giannini Fund

Jan Vanderbilt, (Treasurer), Vanderbilt Certified Public Accountants

Maija West, (Secretary) Law Office of Maija West

Kirk Gafill, President/CFO, Nepenthe/Phoenix Corporation

Romero Jalomo, Vice President of Student Affairs Hartnell Community College

Elsa Mendoza Jimenez, Director of Health Services, Monterey County Health Dept.

Birt Johnson, Jr., Community Volunteer; former General Manager AT&T

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

Judy Guzman Krueger, Managing Director/Regional Manager MUFG Union Bank, N.A.

Giff Lehman, Founder, Integris Wealth Management (Retired)

Adriana Melgoza, Chief Programs Officer, Watsonville Law Center

Fred Meurer, Owner, Meurer Municipal Consulting

Betsey Pearson, Nonprofit Consultant, Retired United Way

Joe Pezzini, CEO Ocean Mist Farms

Francine Rodd, Executive Director, First Five Monterey County

Bill Sharpe, Professor of Finance, Emeritus at Stanford University's Graduate School of Business

Loren Steck, Retired Psychologist Entertainment Industry Consultant

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

Jennifer L. Walker, Attorney/Principal Leach & Walker

We thank Dr. Jose Luis Alvarado, Ida López Chan, Erica Padilla Chavez and Michael Reid for their many years of dedicated board service, which ended in 2020.



^ (l to r) Dan Baldwin, Chalet Booker, Michael Castro, Clarisa Chisum, Julie Conrad, Christine Dawson, Cristina Medina Dirksen, Kim Drabner, Sarah Elias, Esther Figueroa, Karina Gutierrez-Barboza, Amanda Holder, Joel Hernandez Laguna, Laurel Lee-Alexander, Mackenzie Little, Jasmine Menor, Diane Nonella, Robert Mendoza, Susie Polnaszek, Andrea Scott, Janet Shing, Brian Thayer

STAFF

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 Chalet Booker, Administrative Specialist
 Michael Castro, Community Initiatives Manager
 Clarisa Chisum, Administrative Coordinator
 Julie Conrad, Administrative Services Manager
 Christine Dawson, Vice President of Philanthropic Services
 Cristina Medina Dirksen, Communications Coordinator
 Kim Drabner, Director of Finance
 Sarah Elias, Accounting Associate

Esther Figueroa, Scholarships and Community Impact Officer
 Karina Gutierrez-Barboza, Grantmaking and Scholarships Coordinator
 Amanda Holder, Director of Communications
 Joel Hernandez Laguna, Community Impact Officer
 Laurel Lee-Alexander, Vice President of Community Impact
 Mackenzie Little, Philanthropic Services Officer
 Jasmine Menor, Philanthropic Services Coordinator

Diane Nonella, Vice President of Finance & Human Resources
 Robert Mendoza, Grants and Data Manager
 Susie Polnaszek, Director Center for Nonprofit Excellence
 Andrea Scott, Director of Gift Planning
 Janet Shing, Director of Grantmaking
 Brian Thayer, Senior Philanthropic Services Officer

GRATITUDE

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Teri Belli (Vice Chair)
Jan Vanderbilt (Treasurer)
Maija West (Secretary)
Betsy Buchalter Adler
Ida López Chan
Nolan Kennedy
Michael Reid

Audit

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

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Betsy Buchalter Adler
Greg Chilton
Elsa Mendoza Jimenez
Birt Johnson, Jr.

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Kirk Gafill
Birt Johnson, Jr.
Fred Meurer
Joe Pezzini
David Warner

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Elsa Mendoza Jimenez
Birt Johnson, Jr.
Fred Meurer
Maija West

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Betsy Buchalter Adler
Jose Luis Alvarado
Birt Johnson, Jr.
Francine Rodd
Abby Taylor-Silva

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Craig Johnson
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Loren Steck
Jan Vanderbilt

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Hanson Reed
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Maija West

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Birt Johnson, Jr.
Giff Lehman

Fred Meurer
Loren Steck
Bill Tebbe

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Ida López Chan (Chair)
Kathy Cain
Meg Clovis
Oscar Flores
Sharon Gish
Sandy Hale
Judy MacClelland
John Scourkes
Giff Lehman
Betsey Pearson
Bill Sharpe
Mark Verbonich
Lorraine Yglesias-Rice

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Anthony Belleci
Michelle Bevard
Nick Craft
Joseph Hertlein
Jessica Kent
Alondra Valdez Klemek
Peter Meckel
Michelle Slade
Judith Sulsona

Northern Monterey County Foundation Advisory Board

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Glen Alameda
Nancy Ausonio
Leslie Austin
Ricky Cabrera
Don Chapin
Jesus Corona
Karen Miller
Manuel Osorio
John Phillips
Abby Taylor-Silva

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Greg Chilton
Jim Heisinger
Nolan Kennedy
Rick Kennifer
Judy Krueger
Birt Johnson, Jr.
John Mahoney

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Dr. Celia Barberena
Kevin Cartwright
Linnae Ishii Devine
Susan Dooley
Esther Figueroa
Susan Galvin
Manuel Gomez
Felicia Perez Kausin
Danielle Kuska
Rudy Medina

Kim Negri
Mark Peterson
Nettie Porter
Esther Rodriguez
Bianca Salinas
Aimee Sanchez-Toral
Sara Sanchez
Rita Shugart
Jessica Sierra
Diane Danvers Simmons
Ralph Widmar
Kristen Yamamoto

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Grace Borzini
Paulette Bumbalough
Robert Cullen
Michel Hardoy
Peggy Keirn
Mikel Ann Miller
Brett Saunders
Tom Shepherd
Abby Taylor-Silva
Teri Umbarger

Siembra Latinos Fund Advisory Board

Ida López Chan (Chair)
Jose Luis Alvarado
Chris Barrera
Patricia Cruz
Daniel Rodríguez
Elsa Mendoza Jimenez
Raúl Rodríguez
Lorraine Yglesias-Rice
Blanca E. Zarazúa, Esq.

Robert and Virginia Stanton Endowment Committee

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

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
Judie Profeta
Diane Danvers Simmons
Traci Townsend-Gieg
Jeannette Tuitele-Lewis

IN MEMORIAM

NOT PICTURED:

Nancy Bletzer
Legacy Society
Member

Jan Mandel
Legacy Society
Member

John Meeks
Legacy Society
Member



Jack Baskin
Donor/Funding Partner



Nancy Bowker
Donor Advisor



Maxwell Chaplin
Legacy Society Member



Denyse Frischmuth
Donor, Communities for
Sustainable Monterey
County



Gregory Gomez
Successor Donor Advisor



Peter Henning
Donor Advisor



Tom McCullough
Legacy Society Member



Charlie Snorf
Donor Advisor, Legacy
Society Member



Jim Valentine
Donor Advisor, Legacy
Society Member

THANK YOU

Our accomplishments are only made possible through your support.

PARTNER WITH US

Individuals, families and businesses can partner with the Community Foundation for Monterey County to enhance their philanthropy. You can choose to create a giving plan and establish a charitable fund now or leave a legacy through a planned gift. Please give us a call at 831.375.9712 to learn more.

START A FUND - It's simple:

- 1 CREATE** Our team works with you to create a fund that reflects your charitable vision. Establish a fund in your name, your family or company's name, in honor of a loved one or it can be anonymous. Donor advised funds can be established with a gift of \$5,000 or more.
- 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, real estate or tangible personal properties are often used. You can also direct a gift from your will or trust to create or add to a fund.
- 3 GIVE** We can help you make a difference on issues and causes that matter to you most in Monterey County or anywhere in the world.

JOIN US!



Monterey Office

2354 Garden Road, Monterey, CA 93940
831.375.9712

Salinas Office

945 S. Main St., Suite 207, Salinas, CA 93901
831.754.5880



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.

2354 Garden Road, Monterey, CA 93940

HEALTHY SAFE VIBRANT COMMUNITIES

