

## Philanthropy Celebrated

### Mel and Regina Mason Honored with Distinguished Trustee Award

The Community Foundation for Monterey County (CFMC) thanked donors and supporters at its annual Celebration of Philanthropy.

Attendees gathered online and in person on October 19 at The Club at Pasadera. The celebration took place outdoors and observed local COVID-19 safety guidelines.

The event provided an opportunity for the foundation to thank its donors and partners who heeded the call to help since the start of the COVID-19 pandemic. CFMC

President/CEO Dan Baldwin described how the foundation has been able to “Meet the Moment” with a record \$27 million granted in 2020 and over \$30 million granted through September 2021.

Seaside residents and long-time social justice activists Mel and Regina Mason were named the CFMC’s Distinguished Trustees. Board Chair Teri Belli honored the Masons for their social justice work and impact on the community over the years.



(l to r) Teri Belli, Mel and Regina Mason, Dan Baldwin at Celebration of Philanthropy

“The Masons are a true force for good. They are committed to doing what is right,” said Teri.

The couple lauded one another for their ability to work as a team. They shared stories of their backgrounds and drive to start the Village Project, Inc. to address a gap in culturally appropriate mental health services for African Americans.

“What has driven me is having an understanding of oneself to express your identity,” said Mel Mason, adding that such pride and

knowledge drives confidence in youth and sets the path for rising above challenges to succeed.

The Masons designated a \$10,000 grant from the CFMC to be split between NAACP Monterey County Branch and Akira’s Book Club of Oakland, CA. In a surprise announcement, an anonymous donor advisor awarded a \$50,000 grant to the Village Project in the Mason’s honor for their work with equitable COVID-19 vaccine distribution through the VIDA program.

Watch the program at [cfmco.org/Celebration2021](https://cfmco.org/Celebration2021).



VIDA Community Health Workers, community members, and Soledad Mayor Anna Velazquez (2nd from l) at Pop Up Clinic at Soledad McDonald’s

## COVID-19 Collaborative Work Continues

The COVID-19 Collaborative continues to bring people from different sectors together to discuss Monterey County’s needs and assets. As the pandemic has shifted so has the Collaborative, changing to more specific work groups. The Collaborative has provided guidance for VIDA (Virus Integrated Distribution of Aid) Community Health Worker activities and suggested areas

# President's Message Gratitude and Optimism



Dan Baldwin shares CFMC highlights at the Celebration of Philanthropy

Michael Troutman

As 2020 ended, we had no idea what to expect of 2021. The pandemic was ever present, but vaccinations were on the horizon. Businesses were closely tracking the state's tiered system, knowing reduced infection rates would allow for full re-openings, mask requirements notwithstanding. Many restaurants were takeout only and the rest were open with limited capacity. Schools taught remotely. Many of our most popular attractions were closed. Hardly anyone was traveling.

We enter 2022 with more optimism, and, let's face it, a growing sense we're simply learning to live with COVID for the foreseeable future. It has been

especially gratifying to see and be part of the amazing philanthropic response to our community challenges. We're very appreciative of the trust so many have shown in the CFMC, and our doors are open to all who want to partner in the impact philanthropy can bring to community problem solving.

In that environment of uncertainty, the CFMC formed the COVID 19 Collaborative (C19C). The C19C created a roundtable where the public sector, local industries, nonprofits, education and healthcare could strategize together on testing, communications, vaccine accessibility and best practices. Simultaneously, our County Supervisors courageously voted to invest \$4.9 million in a community health worker model that would become the VIDA program. The Packard Foundation generously stepped up to fund our efforts.

“We're very appreciative of the trust so many have shown in the CFMC, and our doors are open to all who want to partner in the impact philanthropy can bring to community problem solving.”

— Dan Baldwin, CFMC President/CEO

Yet, even without COVID 19, Monterey County has significant needs.

Which brings me to Monterey County Gives, the year-end giving program that is a partnership between the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation.

Now a year later, community health workers are a vital part of our fight against COVID. Our county vaccination rate is one of the state's highest. Economic and service delivery sectors are openly communicating. And while COVID is still present, our communities are much better positioned to respond to the curveballs the virus continues to throw our way.

Though, in truth, the partnership is with you. While our three organizations create a structure, raise and provide matching funds, and administer the thousands of gifts that flow into Gives, its success hinges on the generosity of individuals. Close 2021 on a positive note (and get 2022 off to a great start) and give yourself a holiday present. Log onto [montereycountygives.com](http://montereycountygives.com) and experience the joy of helping others. You'll be glad you did.



## Monterey County Gives! 2021

The Monterey County Gives! campaign is structured to provide participating nonprofits a platform to share their big ideas and leverage end-of-year giving thanks to donors to the matching fund. Gifts made before December 31 benefit up to 170 participating nonprofits with a partial match.

“Providing support to agencies who 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, CFMC President/CEO.

The 2020 Monterey County Gives! campaign raised \$7.9 million from 7,576 generous donors. Since launching in 2009, more than \$34 million has been raised and granted to hundreds of Monterey County nonprofits.

**MC GIVES!** Monterey County Gives! is a special project of the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation. Thanks to Neumeier Poma Investment Counsel, Cannery Row Company, The David and Lucile Packard Foundation, Gunde and Ernie Posey Family Foundation, the Colburn and Alana Jones Foundation of the CFMC and donor advisors for their generous support of the match.



# VIDA Health Workers Update



VIDA Community Health Workers went door-to-door to share COVID-19 resources

Community Health Workers (CHWs) from the VIDA project continue to make an impact by providing COVID-19 education, conducting rapid testing, supporting vaccine clinics, and connecting people with isolation and quarantine services. CHWs are focused on being a bridge to people in need during the pandemic.

testing. They partnered with Greenfield Union School District, Alisal Union School District, Soledad School District, Gonzales School District and Monterey Peninsula Unified School District to provide testing.

CHWs are working side by side with stakeholders to hold vaccine clinics throughout Monterey County. VIDA recently partnered with the County of Monterey, City of Soledad and McDonald's Restaurant owner Raymond Costa, a scholarship fund holder at the CFMC, to hold two vaccine clinics. CHWs administered a total of 529 vaccines.

During July and August, VIDA launched a door-to-door campaign to help increase vaccination rates in identified Census tracts of Monterey County. As a result, 100 CHWs reached 25,811 households, held 13,839 conversations, scheduled nearly 1,100 vaccine appointments and encouraged residents to access walk-in clinics.

CHWs heard residents express frustration about challenges scheduling vaccine appointments, needing a deeper understanding of different vaccines, and hesitation to get vaccinated since side effects can lead to missing work and lost income.

Three weeks after students returned to school, there was an increase in COVID-19 cases among children and youth. VIDA was approached by school districts seeking support with rapid



“ My child got the vaccine because it's important. He is in contact with a lot of people at school, in sports and camp. I feel more safe if he is vaccinated. ”

– Soledad parent of a 7-year-old

## COVID-19 Collaborative *(continued from page 1)*

of focus. It provided VIDA with materials to give away, speakers for trainings, and communications support for its testing and vaccine clinics.

Combating misinformation has been one of the most significant challenges when it comes to COVID-19. The Collaborative hosted several webinars to help local small businesses navigate shifting vaccine requirements in the workplace.

The Communications Workgroup disseminates correct information to those who are often overlooked. Materials are designed specifically for targeted populations and methods of distribution are discussed. Different viewpoints, languages and regions are all considered.

Looking ahead, the Collaborative is educating people about how to spend time together safely over the holidays. Easily accessible testing sites, boosters and pediatric vaccines are all being encouraged. The COVID-19 Collaborative will continue to address priorities based on the needs of Monterey County. The Collaborative reinforces the idea that all of us are connected regardless of industry or region. “COVID-19 is a community problem that needs a community solution,” said CFMC President/CEO Dan Baldwin, who leads the collaborative.



**Siembra Latinos Fund**  
OF THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY

The Siembra Latinos Fund was created to inspire giving by and for Latinos. It topped \$80,000 in cumulative grants when it awarded \$23,000 to six nonprofit organizations for projects and programs supporting education, health, and human services serving local Latino residents.

To boost year-end giving, Union Bank has pledged a \$10,000 grant to match donations for the Siembra Latinos Fund. To learn more and make a donation visit [cfmco.org/SLF](http://cfmco.org/SLF).



# The Power of Place-Based Giving

Community leaders have established funds at the CFMC to facilitate place-based giving. These funds are led by local advisory boards who set priorities, raise funds and make grants to groups doing critical work in their communities.

**The Northern Monterey County Foundation (NMCF)** granted \$31,500 to 11 nonprofit organizations in 2021 for projects and programs serving the residents of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita. To date, \$160,000 has been granted from the NMCF for organizations providing community-based services aimed at improving the quality of life for Northern Monterey County residents. See [cfmco.org/NMCF](http://cfmco.org/NMCF).

**The Southern Monterey County Foundation (SMCF)** is participating in this year's Monterey County Gives! campaign to grow funds for nonprofits serving communities from King City to points South. This month the SMCF granted more than \$21,000 to 14 organizations. The SMCF has granted more than \$168,000



SMCF grantee Sol Treasures in King City

since 2014. Learn more at [cfmco.org/SMCF](http://cfmco.org/SMCF) or give before 12/31/21 at [mcgives.com](http://mcgives.com).

**Community Fund for Carmel Valley** plans to grant \$30,000 in 2021 to nonprofit organizations, public programs and other groups serving Carmel Valley and Cachagua residents. Last year the fund responded quickly to the Carmel Fire. "We are lucky to have the umbrella of the foundation, which is well known and trusted," said Alondra Valdez, Advisory Board Member. "People are already asking how they can help us prepare and fundraise for the next fire season." Learn more at [cfmco.org/CarmelValley](http://cfmco.org/CarmelValley).

**The Weston Call Fund for Big Sur** is a special purpose fund created to provide sustainable, impactful and supplemental funding to nonprofit organizations benefiting Big Sur and build resources for disaster relief. In 2021 the following nonprofits received grants: Arts Council for Monterey County, Big Sur Byway Organization, Big Sur Fiddle Camp, Big Sur Land Trust, Big Sur Park School, CERV, New Camaldoli Hermitage and the Ventana Wilderness Alliance. See [cfmco.org/BigSur](http://cfmco.org/BigSur).

## New Funds Created\*

The CFMC manages more than 650 funds established by individuals, families and businesses. To learn more, call 831.375.9712 or visit [cfmco.org/WaystoGive](http://cfmco.org/WaystoGive).

### Agency Stewardship

AMJ Stewardship Fund  
Carmel Cares Fund  
Casa Amesti House and Garden Endowment  
Laguna Seca Raceway Foundation Stewardship Fund  
Monterey Sober Living for Women Home Purchase Fund

### Designated

Equal Access Monterey Bay  
Perry D. and Barbara R. Miller Charitable Fund  
St. James Buildings Renovation Fund  
Susan A. Nerney Budding Performer Fund

### Donor Advised (Endowed)

Sandy Loiacono Fund  
The Terman and Borreson Family Fund

### Donor Advised (Non-Endowed)

Kadushin Robinson Fund  
Armstrong Family Fund  
Dale and Margaret Byrne Family Fund



Leonard Anable established the Shahin Hormozi Anable Scholarship Fund for Women in Math and Science in honor of his late wife.

Collins Family Fund  
Julie Conrad Donor Advised Fund  
Engstrom and West Fund  
Friends of Sunset Donor Advised Fund  
Gabrielle Andrea Walters Fund  
Gaver Family Fund  
The Bradley K Gjerding Fund  
Tracy Gibbons Charitable Fund  
Herman-Mellon Family Fund  
Jett Fighter Fund  
Joe Rock and Robin Venuti Family Fund  
Victor and Lynda Johnson Family Fund  
Painter Family Fund  
Michael E. Reid and William E. Robnett Family Fund  
Ryan Family Fund  
The Weidner Foundation Fund

## The Legacy Society Welcomes New Members

The Legacy Society honors those who have included the CFMC in their estate plans.

Anonymous  
William Parker Bullard and Jessica Frischling  
John and Laura Gamble  
Bernard E. Hanly  
Pam and Gifford Lehman  
Dan O'Brien

If you would like more information about planned giving, please contact Christine Dawson or Andrea Scott at 831.375.9712 or visit [cfmco.org/Legacy](http://cfmco.org/Legacy).

### Special Purpose Fund

Gonzales Community Center Capital Campaign

### Scholarship

Caste Action Alliance Scholarship Fund  
Richard Gourley Memorial Scholarship Fund  
Shahin Hormozi Anable Scholarship Fund for Women in Math and Science

For a complete list, visit [cfmco.org/fundlist](http://cfmco.org/fundlist).

\*Since March 2021

# Designing a Legacy

## Michael Reid

Michael Reid dances to his own beat. His path led him from Brooklyn, New York to Monterey County, California. He was the first in his family to attend college and earned a BA in psychology, two Masters' Degrees and an Ed.D. in Neuromotor Development. He has been married to his partner Bill Robnett for 13 years.



Philanthropy has always been a part of Michael's world view. He worked in the nonprofit arena his entire life. "My ongoing mission in life is to be of service to others. It's always been a part of who I am. Philanthropy provides an opportunity to be part of a collective, which is much more powerful than the individual."

Michael was a professional dancer who worked with adults with special needs. He later moved to Monterey County to work at York School. It was there that he first learned about the CFMC through its role in the community. He next served as Priest at St. Mary's by the Sea in Pacific Grove and became aware of the plight of local women experiencing homelessness. He, Kathy Whilden and Marian Penn staged a photography exhibit to make the problem visible. Michael came to the CFMC with donations from the

exhibit and they co-founded the Fund for Homeless Women in 2012. The Fund has granted \$1.6 million and the endowment has grown to \$334,000.

"Most people I engage with want to reach out and participate in making the world better. Not everyone knows how. I enjoy helping people see a way to participate and be a member of a community that is doing something to make a change."

“ We don't just make it on our own, we're standing on the shoulders of others. We would like to create broad shoulders for those that come after. - Michael Reid ”

Michael and Bill recently created the Michael E. Reid and William E. Robnett Family Fund to facilitate their giving. "We rely on the perspective of CFMC to help us with grantmaking. We want to be mindful and strategic and the CFMC is the perfect partner for that."

In addition to making grants to combat homelessness on the Monterey Peninsula, they support art, Native American culture and childhood education in Santa Fe, where they moved during the pandemic.

Michael and Bill also became Legacy Society members by including the CFMC in their estate plans. "We want to leave a legacy. Over time needs will change and morph into something else, and we want to continue to make life better for others."

Read more at: [cfmco.org/Reid](http://cfmco.org/Reid).

## CFMC Listens, Adapts Grant Funding

Nonprofits depending on philanthropic support need flexibility from their funding partners. The CFMC listens and responds. In a revision to Community Impact—its largest competitive grantmaking program—the CFMC instituted one deadline for all of its funding "buckets" and offered multi-year funding where possible. This change follows national trends and local calls to simplify grantmaking.



In 2021 the Community Impact program granted a total of \$1,777,199.

"Requests from nonprofits always exceeds what we have," said Lee-Alexander, who has taken the lead to convene other local funders to discuss needs in the community. During the COVID-19 pandemic shut down, this group met weekly through August 2020 and continues to meet on a regular basis.

One solution to increase philanthropic resources for the CFMC's unrestricted grantmaking is the Fund for Monterey County. Because the Fund is the combination of endowed unrestricted and field-of-interest funds, grants support a wide variety of causes each year.

To learn more, visit: [cfmco.org/CommunityImpact](http://cfmco.org/CommunityImpact) or [cfmco.org/FundforMontereyCounty](http://cfmco.org/FundforMontereyCounty).

“ We are trying to be as responsive as possible to what grantees have told us they need. - Laurel Lee-Alexander ”

"We want to help nonprofit organizations not only survive, but thrive in these very uncertain times," said Laurel Lee-Alexander, CFMC Vice President of Community Impact, who added that the process took several months of thoughtful planning.

# Grantmaking Plus – Irvine Salinas Project



When The James Irvine Foundation launched a statewide initiative to invest \$135 million in a seven-year project to create jobs and offer economic opportunities in five California cities, including Salinas, they found a ready partner in the CFMC.

“CFMC’s mission of creating ‘healthy, safe, vibrant communities’ aligns well with The James Irvine Foundation,” said Laurel Lee-Alexander, the CFMC’s Vice President of Community Impact. “Leveraging our network, our relationships and leadership in our area has been key to working together to achieve so much more than we can achieve alone.”

The first of three initiatives wrapped up in November – a March 2018 grant of \$1.25 million from The James Irvine Foundation including mentoring and wrap around support to strengthen community engagement, leadership, and economic vitality for low-income Salinas residents. Ten Salinas-based organizations received funds regranted through the CFMC for operating support,

organizational mentoring and coaching and convenings that included training and peer learning.

Participants included: Baktun 12, Building Healthy Communities, Monterey Bay Central Coast Labor Council, Center for Community Advocacy, Ciclovía, Communities Organized for Relational Power in Action, The Epicenter, Girls Inc. of the Central Coast, Motivating Individual Leadership for Public Advancement, Mujeres en Accion and the Center for Community Advocacy.

The next two initiatives are underway; a \$1 million project to provide revolving microloan and entrepreneurship programs targeting low-income people of color and a \$3 million program to support Salinas nonprofits and community groups to influence inclusive economic development.

“We are honored to be able to partner with The Irvine Foundation in this important work,” said Lee-Alexander.

Read more: [cfmco.org/Irvine](http://cfmco.org/Irvine).



## CNE Taking the “Lead”

The Center for Nonprofit Excellence - CNE - offers unique value to local nonprofits of all types and sizes by helping them to connect with resources and with one another. We welcome Reid Norris to the CNE team as Leadership Development Specialist. As a former executive director of a Monterey County nonprofit, Reid understands the challenges, responsibilities, and rewards of this work.

In a recent CNE survey, one-third of local nonprofits reported a leadership transition this year or in the near future. In his role with CNE, Reid will facilitate the LEAD Institute, guiding and empowering nonprofit leaders as they grow, transition, and positively transform our community.

Through consultation, Organizational Development grants and learning opportunities, Reid and CNE Director Susie Polnaszek are eager to support local board members and staff in strengthening their organizations. Learn more at [cfmco.org/cne](http://cfmco.org/cne).



Susie Polnaszek, Director CNE and Reid Norris, CNE Leadership Development Specialist

“ I’m thrilled to work with the Center for Nonprofit Excellence and the LEAD institute, because I’ve experienced the incredible impact that collaboration, grantmaking and mentorship can have for local organizations and leaders. ”

– Reid Norris

# Staff News

As giving, grantmaking and community initiatives have grown, so has the staff of the CFMC. In finance, Kim Drabner was promoted to Vice President of Finance and Human Resources, succeeding Diane Nonella, who retired after more than 22 years with the foundation. Accountant Brian Erbele, Director of Finance, and Gianna Yim, Accountant, also joined the finance team.

The CFMC welcomed Maria Hauman as its Director of Operations, following the retirement of Julie Conrad who served the CFMC for more than 16 years. Chalet Booker was promoted to Administrative Specialist and Clarisa Chisum took over as Administrative Coordinator and greets visitors in the Monterey office.

Philanthropic Services added Jasmine Menor as Philanthropic Services Coordinator. Joel Hernandez Laguna joined the CFMC as Community Impact Officer, Reid Norris became the first CNE Leadership Development Specialist (see page 6) and Karina Gutierrez-Barboza was promoted to Grants and Data Specialist.

Meet the team at [cfmco.org/Staff](http://cfmco.org/Staff).



**Kim Drabner**



**Brian Erbele**



**Gianna Yim**



**Maria Hauman**



**Chalet Booker**



**Clarisa Chisum**



**Jasmine Menor**



**Joel Hernandez Laguna**



**Karina Gutierrez-Barboza**

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Daniel R. Baldwin, *President/CEO*

# CFMC Honored for Pandemic Response

The CFMC led the philanthropic response to the COVID-19 pandemic and was recently recognized for its work.

Dan Baldwin accepted a resolution from the Monterey County Board of Supervisors honoring the CFMC for its leadership in the COVID-19 Collaborative and the COVID-19 Relief Fund.



(l to r) Supervisor Wendy Root Askew, Dan Baldwin, Supervisor John Phillips and Supervisor Mary Adams

The City of Salinas Community Alliance for Safety and Peace (CASP) presented the CFMC with CASP's Philanthropy for Peace award. The CFMC was also voted "Best Pandemic Response Community Initiative" by readers of the Monterey County Weekly.



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COVID-19 Collaborative

Creating a Legacy – Michael Reid

Plan Your Giving

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HEALTHY, SAFE, VIBRANT Communities



The CFMC thanks the Carmel Chamber of Commerce Leadership Class 2020-2021 for their generous gift of more than \$37,000 to the Carmel Woman's Club. The Club is adding the gift to the Carmel Woman's Club Scholarship Endowment Fund at the CFMC. (l to r) Donna Jett, Wanda Vollmer, Tina DeMaria, Christine Dawson, Jenny McCurdo

Lending your support to nonprofits doing critical work is easy. The CFMC can enhance your philanthropy and has several ways to give. Each of these options offer tax advantages and can help you make a meaningful difference. We can help customize a solution that works for you.

**Donor Advised Funds (DAFs)**

This is a great way to claim a tax deduction and support your favorite causes. Donor advised funds can be created quickly and easily with a gift of \$5,000 or more.

**Gifts of Real Estate or Appreciated Stock**

Gifts of real estate or appreciated stock are both good options to benefit a nonprofit with a direct gift and benefit the donor. With a gift of appreciated stock or mutual funds, there is no capital gains tax on the sale of the stock and donors receive an immediate income tax deduction for the full value of the asset.



**Life-Income Gifts: Charitable Remainder Trusts and Charitable Gift Annuities**

These gifts offer tax deductions and income for life (a portion of which may be tax free). The remainder creates a fund to benefit any nonprofit you choose.

**IRA Qualified Charitable Distribution**

If you are 70 1/2 or older, you can make a gift from your IRA account to the CFMC for the causes you care about. Gifts made from your IRA (up to \$100,000 per year) are not taxable income. If you are 72 or older in the year of the distribution, your gift qualifies towards your Required Minimum Distribution. If you are married, your spouse can also make a gift of up to \$100,000 from their IRA.

An IRA Qualified Charitable Distribution may also be made through Monterey County Gives! (see page 2) to benefit multiple nonprofits with one set of instructions.

Visit [cfmco.org/waystogive](http://cfmco.org/waystogive) or call 831.375.9712 to learn more.