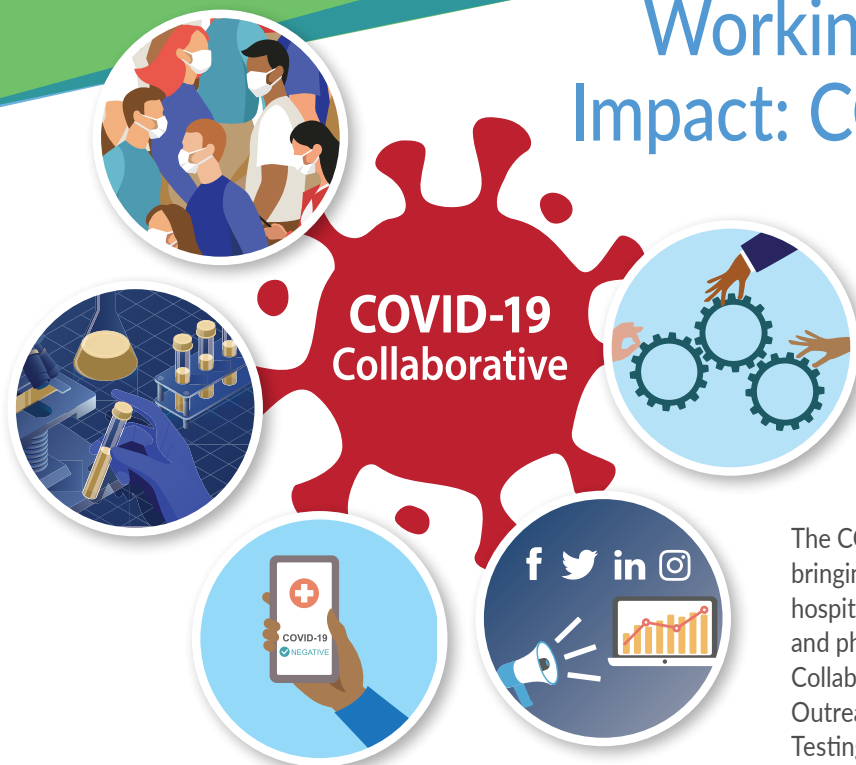


Working Together for Greater Impact: COVID-19 Collaborative



The effects of the COVID-19 pandemic have permeated virtually all aspects of life. Our health, the economy, education, government, social lives and daily living. People and businesses have been struggling for more than a year. The Community Foundation for Monterey County (CFMC) is leading a diverse group of stakeholders to help lower the incidence of COVID-19 in Monterey County. The goal is to advance a coordinated action plan driven by science and best practices in public health and equity.

The COVID-19 Collaborative is a countywide, multi-sector group bringing together Monterey County, multiple cities, agriculture, hospitality, education, healthcare, community-based organizations and philanthropy to lower the spread of COVID-19. The Collaborative created workgroups to best utilize its member's skills: Outreach & Support, Science & Best Practices, Resources & Funding, Testing and Communications.

The Collaborative has a particular focus on the most highly impacted areas. Efforts are underway to give community health workers the tools they need to reach out to indigenous communities and other hard to reach groups. The David and Lucile Packard Foundation recently granted \$1.32 million to the CFMC to further the group's efforts to alleviate COVID-19 cases in Latinx, immigrant and farmworker communities and facilitate equitable vaccine distribution.

For more information visit cfmco.org/COVID19Collaborative.

“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.”

— Dan Baldwin, CFMC President/CEO

A Record Year of Generosity \$27 Million Granted

Despite the challenges of the pandemic, or perhaps because of it, community generosity propelled the foundation to a record year of gifts and grants.

Thousands of donors contributed \$51 million to the CFMC, \$15 million higher than the next closest year. Community generosity was in full display through the \$4 million contributed to the COVID-19 Relief Fund.



Julia Guzman, Case Manager for the Ted Taylor Ag Mechanics/Electrical program at Rancho Cielo, delivering food bags to her students and their families

continued on page 2

President's Message

Building on an Exceptional Year

We turned the page on 2020, leaving behind a year for which there aren't enough adjectives, both good and bad. Our 75th year, like no other, validated the wisdom of our founders. The CFMC was never more vital. In the midst of tremendous public health and economic trauma, the CFMC, in partnership with its donor advisors, fellow foundations, businesses and hundreds of donors, was able to provide much needed support to our most vulnerable communities. We granted more than \$27 million in 2020, well surpassing our previous high of \$19 million in 2019. Yet we find it hard to celebrate accomplishments in the face of so much need.

The effort received a tremendous boost in late December, when the County Board of Supervisors approved \$4.9 million to support the hiring of 100 community health workers.



Dan Baldwin at 2020 Legacy Luncheon

Late in 2020 the CFMC agreed to lead a countywide collaborative, bringing together the County, municipalities, agriculture, hospitality, healthcare, education, community-based organizations (CBOs) and philanthropy in an effort to drive down infection rates in our most affected areas. More than 85 attended the initial Zoom meeting on November 20. It was agreed there was value in forming the COVID-19

Collaborative, so that energies, resources, projects and communication would be aligned and coordinated. We quickly enlisted consultants from the Consensus Building Institute to facilitate the process. We were off and running.

In addition to a coordinating committee, the Collaborative now has five working groups meeting on a weekly or bi-weekly basis. The groups are centered on communications, resource development, outreach, testing/vaccination and best practices. The Collaborative meets bi-weekly.

“Our 75th year, like no other, validated the wisdom of our founders. The CFMC was never more vital.”

— Dan Baldwin, CFMC President/CEO

These workers are trained by the County, hired by CBOs and work closely in the most impacted parts of our county. They are trusted messengers, as well as navigators, helping people find their way to testing sites, quarantine, and now vaccination centers.

The funds came to the CFMC. We quickly established a grant program to resource the

CBOs, who hired the trained workers. They are making thousands of contacts in our most affected neighborhoods.

One of my new colleagues in this effort, an epidemiologist, likes to say, “Hope for the best; plan for the worst.” After a year of COVID, we now have optimism that large-scale vaccination programs will help us return to some degree of normalcy, making us safer and allowing the economy to re-open. In the meantime, we must remain vigilant with testing and social distancing. Stay safe.

Record Generosity *(continued from page 1)*



COVID-19 Relief Fund grantee Palenke Arts helped families meet basic needs

Grantmaking was streamlined and relief fund donations granted quickly to meet immediate needs. For a full list of grants see the enclosed COVID-19 Impact Report (pages 5-12) or visit cfmco.org/CovidRelief.

Donors gave \$1.2 million for wildfire relief 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. See cfmco.org/FireRelief for grantmaking details.

Monterey County Gives! set a new record, raising nearly \$7.9 million. (See story page 3). In addition to this exceptional community support, people created more than 50 donor advised funds at the Foundation and included the CFMC in their estate plans.

We are grateful to live and work in a place where people demonstrate their care for one another, especially in times of extraordinary challenge.

Fund for Monterey County: Meeting Changing Needs

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.

Responsive Philanthropy

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



Mentoring at Community Partnership for Youth in Seaside

“ 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 over time. ”

—Bertie Elliott

How it Works

- Unrestricted gifts provide the philanthropic resources to meet current and future challenges.
- Donors can give directly to the Fund for Monterey County or name the Fund as the beneficiary of a donor advised fund.
- 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.
- Gifts to the fund create a source of community capital, helping to do good work forever.

No matter the challenges, the Fund will create a more healthy, safe and vibrant Monterey County. Visit cfmco.org/FundforMontereyCounty to learn more.

Scholarship Story: Ismael Rocha



College Futures Monterey County scholarship recipient Ismael Rocha is living his dream. The first in his family to attend college, he is in his final year at CSU Monterey Bay, where he studies kinesiology. He is coaching and mentoring at his alma mater, King City High School, and will be pursuing a Master's Degree. See his story: cfmco.org/Rocha.

The CFMC manages more than 55 scholarships, and awarded more than \$1.8 million in 2020. Find out more at: cfmco.org/Scholarships.



Monterey County Gives!

The 2020 Monterey County Gives! campaign smashed its previous record of \$5.4 million to raise \$7.9 million from 7,576 generous donors.

This marks a 46% increase in the dollar amount given and a 51% increase in the number of donors who supported the 162 participating nonprofits.

The end-of-year giving campaign is structured to provide participating nonprofits a platform to share their ideas and a pro rata match thanks to donors to the matching fund.

“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.

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, the Colburn and Alana Jones Foundation of the CFMC and donor advisors for their generous support of the match.



Caring for Community

Birt and Kathleen Johnson, Jr.

Birt Johnson, Jr. and his wife Kathleen are deeply committed to their community. They are both children of career military families who believed Monterey County represented one of the best places to raise their families.

Birt has been active on many local boards of directors, including the CFMC, where he served as the Board Chair in 2019 and 2020.

The couple worked with the CFMC to establish a donor advised fund to make grants to local nonprofits. "Birt and I chose to open a donor advised fund at the Community Foundation because we have long believed a caring community is one that gives hope to individuals or nonprofits in need of support," Kathleen explained.

"We feel good about working with the Foundation because they carefully listen to understand your intentions and offer varied options with established nonprofits," said Birt.

Birt and Kathleen appreciate the CFMC's personal approach, "They provide an efficient and effective way to reach multiple nonprofits that are meaningful to us. The Community Foundation is a trusted and valued resource serving the many communities of Monterey County. We are



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

– Birt and Kathleen Johnson, Jr.

committed to making our community a better place for all," they noted.

About the CFMC they said, "The Community Foundation represents hope."

Read their story and watch their video: cfmco.org/Johnson.

New Funds Created*

The CFMC manages more than 570 funds established by individuals, families and businesses. To learn more, call 831.375.9712 or visit cfmco.org/WaystoGive.

Agency Stewardship

Carmel Valley Manor Foundation
Stewardship Fund

Designated

Nancy Jane Bletzer Fund
Joseph and Betty Chaffers Fund
Montage Health Support Fund at the
Community Foundation for Monterey
County
Teacher Pathway Program Hartnell
Teacher Pathway Program Cal State
University Monterey Bay

Donor Advised (Endowed)

William R. and Duncan B. Lewis Family
Foundation Fund

Donor Advised (Non-Endowed)

Dooling Family Fund
John and Laura Gamble Family Fund
Jim and Barb Gianelli Fund
Richard Hamilton and Debra Schadeck
Charitable Fund



2019 California Rodeo Salinas
Scholarship recipients

Ann and Brian Jacobson Charitable Fund
Frank and Michelle Knight Family Fund
Noorani Family Fund
O'Brien Family Fund
Bill and Rita Patterson Foundation Fund
Pfeiffer Ridge Fund
Steve and Gail Snodgrass Charitable Fund
Yoga For All Movement Fund
Zalan Family Fund

Scholarship

California Rodeo Salinas Scholarship Fund
Casilda Paul Memorial Scholarship Fund
Emerging Leaders Society of United Way
Monterey County Scholarship Fund
Nancy Fowler Memorial Scholarship Fund
FW Family Scholarship Fund

The Legacy Society Welcomes New Members

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

Natasha Doner
Kevin Gilman
William Kampe
Jack and Angeleke Levy
Daniel H. O'Brien
Mimi Sheridan
Mary Skipwith
Larry Tartaglino
Jan Vanderbilt
Peter Hiller and Celeste Williams

Legacy Society members may also choose to remain anonymous. To join or if you would like more information about planned giving options, please contact Christine Dawson or Andrea Scott at 831.375.9712 or visit cfmco.org/Legacy.

*Since October 2020

COVID-19 Relief

Impact Report



Here for Good
Community Foundation
for Monterey County





Message from the President

When news of an unknown virus began circulating in early 2020, we could not predict the impact on Monterey County. Never have we faced a public health challenge that would create such economic upheaval. While not a role we anticipated, the Community Foundation for Monterey County embraced its responsibility to be catalyst for giving, directing resources where the impact was greatest. Many thanks to all the donors – and grantees – of the COVID 19 Relief Fund. The CFMC is proud to be your partner in bringing support to our community.



—Dan Baldwin, CFMC President/CEO

Responding to Community Need

COVID-19 spread physical, psychological, emotional and economic damage throughout Monterey County and the world. 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, to support local nonprofits providing food, housing, mental health and other critical services.

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

COVID-19 Relief Fund: By the Numbers

\$3,955,595 received
from **613** donors

\$3,418,394 granted
in **150** grants

\$962,851 added to the fund
in grants and gifts from CFMC Donor
Advisors, plus more than \$1 million
granted directly for COVID relief

\$422,719
allocated to COVID-19
Relief from CFMC Funds

"The grant helped us meet increased demand to get more than 600 computers in the hands of students for online learning. Thank you for changing the lives of many people for the better."

— Christian Mendelsohn, Founder and Executive Director, Loaves, Fishes and Computers



Gateway Center
\$10,000 for
program supplies
for isolated clients



Marina Foundation
\$15,000 for
Marina Seniors
Emergency Fund



Veterans Transition Center
\$30,000 for
the food pantry



Dorothy's Place
\$37,000 for
essential services for
the unsheltered

Grantmaking Impact

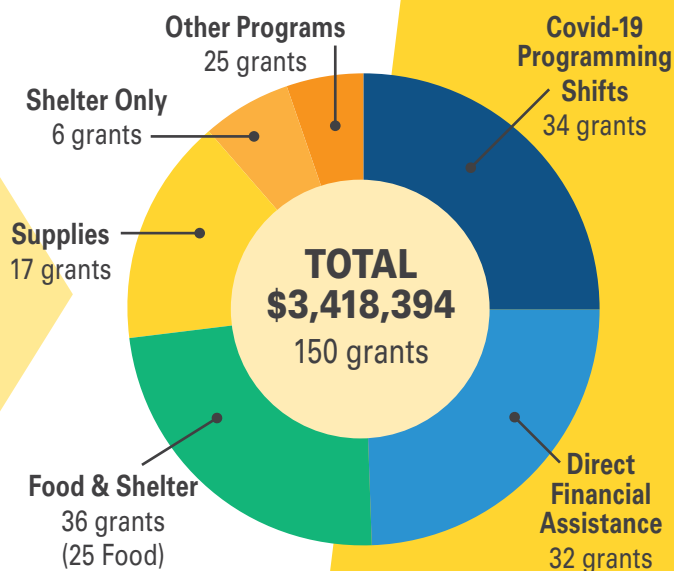
More than \$3.4 Million Awarded

Impact has been great. Grants helped feed families, purchase masks and personal protective equipment (PPE) for medical workers, provide childcare for essential workers and offer services for seniors, the homeless and those with special needs. Many nonprofits, such as the Boys & Girls Clubs of Monterey County and Palenque Arts, shifted their business models. They both support families through meals and gift cards.

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
● Support: other programs	\$ 496,750

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



Combating Inequity

The pandemic has highlighted the inequities present in our county. It has disproportionately affected low-income and people of color. Recognizing this imbalance, the CFMC directed grants to nonprofits addressing equity challenges and through the COVID-19 Collaborative (See page 9) to help areas most heavily impacted by the virus.

Strong Response, Increased Demand

Despite the strong philanthropic response so far, we know the health and economic wellbeing of many Monterey County residents are threatened, and nonprofits need resources to help. The demand for services coupled with lower revenue increases the strain on agencies providing meals to the elderly, aid to the homeless and other important services.



Community Human Services
\$30,000 for essential services



American Red Cross
\$30,000 for blood drive and relief programs



Central Coast YMCA
\$50,000 for Emergency child care for essential workers



Gathering for Women
\$37,000 for essential services for women

COVID-19 Relief Fund Grants*

Food and Shelter

Food only

- **Caroline's Pantry** – \$15,000 Food distribution program in North Monterey County
- **Elkhorn Slough Foundation** – \$20,000 COVID-19 Healthy Lands, Helping Hands program support
- **Everyone's Harvest** – \$10,000 COVID-19 organizational support for safe access to healthy food
- **Food Bank for Monterey County** – \$150,000 (3 grants) for emergency food assistance
- **Independent Transportation Network (ITN)** – \$20,000, COVID-19 collaborative meal delivery program for seniors
- **The Marina Foundation**: two grants – (\$5,000 and \$10,000) for the senior meals program
- **Rancho Cielo** – \$17,500 Rancho Cielo Emergency Food Bag Program
- **Sabu Shake Memorial Foundation** – \$13,000 Meals for the homeless, Salvation Army transitional housing residents and hospitality workers
- **Second Harvest Food Bank Santa Cruz County** – \$10,000 Pajaro Valley COVID-19 relief

Food and Shelter:

- **Gathering for Women** – \$20,000 Wellness support for homeless women
- **Interim, Inc.** – \$11,000 Support for bedding, clothing, and food gaps due to the COVID-19 crisis
- **Monterey Peninsula Unified School District** – \$30,000 Temporary shelter and basic needs for homeless students and families
- **Sun Street Centers** – \$24,300 COVID-19 Food, Health and Safety Supplies

Shelter

- **CHISPA** – \$20,000 COVID-19: Resident Relief
- **Orphan Productions** – \$21,845 COVID-19 support for Safe Parking Program
- **The Carmel Foundation** – \$20,000 Low-income housing for seniors

Supplies – Emergency, Program

- **Alliance on Aging** – \$10,000 COVID-19: iPads for resident/family communications
- **Central Coast Visiting Nurses Association (CCVNA)** – \$20,000 Emergency medical supplies for clinicians
- **Dentistry for Vets** – \$15,000 COVID-19 PPE support
- **First 5 Monterey County** – \$30,000 Essential supplies for families with children 0-5 (diapers, wipes, formula)
- **PG Steam** – \$5,000 COVID-19 face masks

Direct Financial Assistance to Individuals and Families

- **Alisal Education Foundation** – \$30,000 Emergency financial support for families in East Salinas
- **Arts Council for Monterey County** – \$20,000 Emergency support for artists
- **Breast Cancer Assistance League** – \$20,000 Increased special needs grant requests due to COVID-19 (first grant) and \$30,000 special needs grant requests (second grant)
- **Castroville Coalition** – \$10,000 Direct support for North Monterey County residents
- **Catholic Charities** – \$30,000 COVID-19 support for families and funeral costs
- **City of Gonzales** – \$30,000 Gonzales Together program: emergency support for families in Gonzales and Chualar
- **Community Association of Big Sur** – \$30,000 COVID-19 Direct support for unemployed in Big Sur and \$30,000 direct support for individuals and families
- **Door to Hope** – \$15,975 Direct support for clients - COVID-19 response
- **Eden Housing** – \$19,900 - Emergency fund to support low-income tenants
- **Hartnell College Foundation** – \$30,000 Emergency relief scholarships and technological support
- **Monterey Peninsula College Foundation** – \$30,000 COVID-19 Student Relief Program
- **Palenke Arts** – \$25,000 Emergency financial support for immigrant families in Seaside
- **Santa Cruz Community Ventures** – \$25,000 Direct financial aid for undocumented workers and families in Monterey County

“We have seen a dramatic increase in demand. This grant will enable us to significantly increase the volume, quality, and nutritional value of VTC’s pantry. We’re very grateful.”

– Jack Murphy, Deputy Executive Director,
Veterans Transition Center



COVID-19 Related Programming Shifts to Support Vulnerable Populations

- **Blind and Visually Impaired Center** – \$12,000 Support for program revisions due to the COVID-19 crisis
- **Boys & Girls Clubs of Monterey County** – \$25,000 COVID-19 supplies, signage and summer learning kits
- **California Rural Legal Assistance** – \$30,000 Increase access to unemployment benefits for workers impacted by COVID-19
- **CASA of Monterey County** – \$15,000 Operating support - foster youth advocacy program impacted by COVID
- **Central Coast YMCA** – \$50,000 Emergency child care for Monterey County essential workers due to COVID-19
- **Loaves, Fishes and Computers** – \$18,000 and \$30,000 – Computers for low-income families
- **Monterey County Rape Crisis Center** – \$20,000 COVID-19 operational support
- **Monterey County Office of Education** – \$30,000 Closing the digital divide for Monterey County schools
- **Natividad Medical Foundation** – \$30,000 COVID-19 prevention program for farmworkers
- **Natividad Medical Foundation** – \$30,000 Free COVID-19 testing for farmworkers
- **Pajaro Valley Prevention & Student Assistance** – \$15,000 to cover mental health impacts related to COVID-19
- **Rights Counsel (DBA – Immigrants Rights Counsel)** – \$30,000 COVID-19 operational support
- **Special Kids Connect** – \$10,000 COVID-19: academic support for children with special needs
- **United Way Monterey County** – \$30,000 Informal Child Care Providers (Family, Friends and Neighbors) Relief Program
- **YWCA of Monterey County** – \$30,000 Adaptation of existing programs to ensure 24/7 safety of the Domestic Violence Shelter

Program Support

- **American Red Cross of the Central Coast** – \$30,000 Support for blood drive and relief programs due to the COVID-19 crisis
- **Community Partnership for Youth** – \$50,000 On campus and remote mentoring, tutoring and student support (partnership with MPUSD)
- **Kidpower** – \$20,000 Social-Emotional safety skills training - COVID-19 response
- **Southern Monterey County Memorial Hospital (Mee Memorial Hospital)** – \$30,000 Emergency medical funding

*Partial list. See all grantees at
cfmco.org/CovidReliefGrants.



Partnering with Community

Emergency Assistance Funds

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

- The Love Our Central Coast team of churches and 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.
- **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.
- The CFMC worked with the Monterey Peninsula Chamber of Commerce to create the **Small Business Assistance 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 a dozen projects including mask and food distribution, raised \$590,000 and granted \$440,000.



Dan Baldwin, President/CEO of the Community Foundation for Monterey County, is leading a diverse group of stakeholders to help mitigate root causes and lower the incidence of COVID-19 countywide. (See page 1). There are five work groups whose accomplishments include:

- Created the VIDA community health worker program (See page 15)
- Hired and onboarded 110 community health workers
- Leveraged additional funding including \$1.32 million from the David and Lucile Packard Foundation and \$300,000 from Together Toward Health, a program of the Public Health Institute to support community health workers.
- Established a process to coordinate community health workers at local testing sites
- Developed a new testing strategy and recommendations
- The County of Monterey and Community Foundation for Monterey County provided funds for the 2-1-1 call center to facilitate scheduling of testing and vaccine appointments
- Reduced duplicative efforts across the industries/sectors and helped keep messaging consistent
- Created communications toolkit accessed by more 100 people weekly.

For more information visit cfmco.org/COVID19Collaborative.



Love Our Central Coast Feed the Homeless Fund has granted \$122,773 for homeless relief



Carmel Gives Fund distributed \$440,000 for community programs in response to the pandemic



Community healthcare workers use personal outreach to help people access needed resources

COVID-19 Relief Fund Donors

Includes gifts through February 2021

Anonymous (75)
 Anonymous Fund (3)*
 Aera Energy
 Bryan and Joann Aguirre
 Mary Alberts
 Heather Alcantar
 Sheila Allaire
 The Allison Charitable Fund at Vanguard Charitable
 American Water Charitable Foundation
 Amy Anderson and George Somero Fund*
 Leslie Anderson
 The L/G Anderson Family Foundation
 An Anonymous Fund at Fidelity Charitable
 Rick and Tonya Antle Fund*
 Walter Antoku
 John Archer
 Judy Archibald
 David G. and Christine Armanasco
 Hank Armstrong
 Charles and Patricia Asmus
 Kathleen M. Baker and Lawrence M. Johnson
 Barbara J. Baldock and Phillip N. Butler
 Dan Baldwin and Anne Ylvisaker Fund*
 Gary and Judy Bales
 Anne Banta
 Eric and Andrea Barajas
 Bareuther Family Foundation*
 Eric and Marilyn Barr
 The Peggy and Jack Baskin Foundation
 Julia Batchev
 Beacon House
 David and Judy Beech
 Robert and JoAnna Behl Charitable Fund at the Silicon Valley Community Foundation
 Lino and Teri Belli Family Fund*
 Lino and Tino Belli
 The Benevity Community Impact Fund
 Marta L. Bennett Fund*
 Sheila Benson
 Sarah M. Berling
 Big Sur Marathon Foundation
 Mads and Susan Bjerre Charitable Fund*
 Mads and Susan Bjerre Charitable Fund at the California Community Foundation
 The Blackburn Giving Fund
 R. Stephen Bloch
 Marisa Blueford
 Paul Blum
 Richard J. Borda
 Eric L. and Patricia Bosler
 Kline Boudreau
 Nancy Bowen
 Teri Breschini
 Mary Bronzan
 Peter K. Brooks
 Billie Lee Brown
 Elizabeth Plaxton Brown
 The Brown Family Fund*
 Brown Family Fund at Schwab Charitable
 Paul and Susan Bruer
 Nancy Bryson
 Buchalter/Adler Family Fund*
 The Buffett Fund*
 Kim Bui
 Josephine Bunn Fund*
 Kathryn Burnside
 John D. and Janet S. Bush
 Bob and Stephanie Byrne
 California International Airshow
 The California Wellness Foundation
 Karen Calley
 Phillip Carey and Koji Kainuma
 Carmel Berry Company
 Carmel Host Lions Club Foundation

Carmel Rotary Club Fund*
 Carmel Valley Women's Club
 Cheryl Carter
 Kendra Carter
 Ruth Carter
 Sharon Cast
 Elizabeth Cayne
 CFMC Employee Match**
 Gail Chambers
 Erika Chan
 Charities Aid Foundation of America
 Richard Cheatham
 Richard Chew
 James Chibidakis
 Nona Childress
 Valerie Choy
 Elizabeth Christian
 Church in the Forest
 Marilyn A. Churilla
 Harriet P. Claessen
 Mary J. Clapper
 Sheila Clark
 Willis W. & Ethel Clark Foundation
 Dana Cleary
 Cleo Foundation
 Kay Cline
 Woodworth Clum
 Lulla Clum
 Bobbe Collins
 Patricia Connolly
 Stephen and Madeleine Conran Fund**
 Ronald Coulter
 Kathleen Cozzens
 Amelia Craig
 Alice Crawford
 Catherine M. Crockett
 Reno C. and Joan C. Cromer
 Earl Wayne and Linda Cruzan
 Jesse and Sandra Cude
 The Curry Gift Fund at Schwab Charitable
 John and Pamela Darling
 Pamela Darling
 Matthew Davis
 Jenine Davison
 Amy Dawe
 Joseph and Cheryl De Gier
 Sandra DeLay
 Sheila Delimont and Robert Neubert
 David DeMers
 Colleen Devlin
 Marcia F. DeVoe Fund*
 Charles E. and Diane Deweese
 DeWitt Fund*
 Mark Dias
 Sarah Diehl
 William Dirickson
 Susan Ditzler
 Margaret Donat
 Doolittle Fund*
 Mark and Marilyn Dorman
 Driscoll's Charitable Fund at Community Foundation of Santa Cruz County
 Duda Farm Fresh Foods, Inc.
 Jean Duff
 Victoria Duke
 Nancy Durein
 Eagan Family Foundation, Inc.
 Thomas Eagleton
 Carol Edmonds
 Cathey Edwards
 Janette Edwards
 Sarah Elias
 Bijan Emadi
 Susan Erickson
 Miguel and Dorothy Errea
 Colette Erreca-Norris
 Elena Falkovskaia
 Jennifer Fellguth
 Lewis and Gloria Fenton Fund**

Elizabeth Ferguson
 Peter Finocchio
 John R. and Leslie Fisher
 Lorita Fisher and Kathleen Fisher Pampkis
 Myrleen Fisher
 Anne R. Fitzpatrick
 J.L. and Jacqueline Fobes
 Sam Fonte
 Eve Forrest
 Linda Frederiksen
 Gordon Freedman
 Robert Frischmuth
 Front Range Equine Performance LLC
 Margene Fudenna
 Fuqua Family Foundation Fund*
 Kirstin Gafill
 Tom and Mary Kay Gallagher Fund*
 Kristen Gast
 Frances R. Gaver
 Shawn Gazzano
 Gerosin Fund*
 Claire Giannini Fund
 Virginia Gilbert
 Kim Gilbreath
 David and Susan Gill
 Maureen Gill
 Bonnie B. Gillooly
 Gindick Family Foundation
 Alice Ann Glenn
 Gloria Fund*
 Rudy Gnekow
 Lynn Goldstein
 Trinidad and Lupe Gomez Family Fund*
 Raymond Gonzales
 The Goodman Family at Goldman Sachs Philanthropy Fund
 Scott Gordon
 Gorman Charity Fund at Schwab Charitable
 Dan and Patricia Gotch
 Dan Gotch
 Maggie Grainger
 Tom Grainger Memorial Fund*
 Madeline Grant
 Pat Grant
 Lewis and Jean Greenblatt
 Aaron Gregg
 Frank and Charlotte Gregory
 Michael Grimm
 Hal Grotke
 Robert Gualarte
 John Hain
 Russell and Monta Haisley
 Samuel and Hope Hale
 Samuel Hale
 Catherine M. Hambley
 Patricia Hamilton
 Margaret A. Hansen
 Sarah Hardgrave
 Donna Hardina
 Reuben and Tamara Harris
 Carol Hart
 The Hartman Family Charitable Fund at Vanguard Charitable
 Larry Hayes
 Holly Haynes
 Elliott Hazen
 Lucie Hazen
 John S. Hedgcock
 James Heisinger
 Heisler Foundation
 Leslie Helgason
 The Peter and Jackie Henning Fund*
 Robert and Anne Herendeen
 Carol Hilburn
 The Ann Mayer Hiller Memorial Fund*
 Abigail Hoffman
 Carol Lee Holland
 Douglas Holtzman

Cora R. Hoover
 Carol Hopkins
 Heidi Hopkins
 Lyndsey Horn
 Ann Houle
 Emily Howard
 William A. and Catherine N. Howes
 Jay and Kip Hudson
 Kip Hudson
 Joan C. Hughes
 Emily Hull-Parsons
 Erin E. Hunter
 Huth Family Fund*
 Robert Hylton
 Intero Foundation Inc.
 Michael and Gloria Ipson
 Michael Ipson
 The James Irvine Foundation
 Lee Jacobs
 Kay Jamieson
 Kathleen Jeal
 Aengus L. Jeffers
 James Jeffery III
 Harlan W. Jencks
 Elsa M. Jimenez
 Birt and Kathleen Johnson, Jr. Fund*
 Lynne Johnson
 Colburn and Alana Jones Foundation*
 Sharon Jones
 Mary S. Julien
 Leslie B. Kadis, MD & Ruth McClendon Foundation Fund*
 Charles R. and Carol J. Keller
 Diane Kelsey
 Nolan M. Kennedy and Debi Hardwick Kennedy
 Michele Kennedy
 Robert Kent
 James Kern
 Meghana Kikkeri
 James R. Killigrew
 Susan Kingsley
 Donald and Judith Kirk
 Mary Ellen Klee
 Alex and Kim Klikoff
 Kathleen Knight
 Kathy Kobata, CPA
 Bill and Bethany Koenig
 Normond V. and Manuela O. Kolpin
 Raimie Kriste
 Sheldon Krizelman
 Amy Krupski
 Kahori Kuramura
 Robert Kurtz
 Caron and Alan Lacy Charitable Fund at Fidelity Charitable
 The Landreth Family Fund*
 Leo Lanini Fund**
 Yong Lao
 Michael Lauritson
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Leveraging Impact Community Impact Investments

The CFMC committed \$1 million through its Community Impact Investment Program to help fund loans to small business owners who are not eligible for the Payroll Protection Program and other CARES Act benefits. Community impact investing is a mission-driven placement of capital designed to bring a return to the organization while creating community benefit.

The CFMC worked through the Mission Economic Development Agency (MEDA) in partnership with El Pajaro CDC to make loans to small businesses, primarily in Northern Monterey County and Salinas. 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.



Marleny Rivas, owner of Marleny's Pupuseria, received a loan and business support through El Pajaro CDC



Strengthening Nonprofits—Beyond Grantmaking

The CFMC's Center for Nonprofit Excellence (CNE) offered training and resources to bolster local nonprofits' effectiveness during the pandemic. Online resources and referrals to trusted sources and virtual webinars helped nonprofit staff and boards navigate the new environment. One-on-one coaching and peer support through the LEAD (Leadership, Education and Development) Institute offered nonprofit leaders a crucial lifeline during the unfolding crisis. CNE produced a report highlighting needs and impact of COVID-19. Read more about nonprofit resilience and response in the report and find resources here: cfmco.org/COVID19NonprofitResources.

The Need Continues

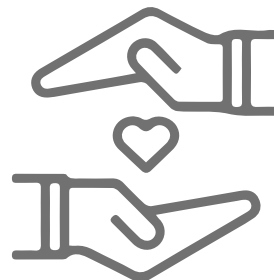
Thank you to all those who have supported the COVID-19 Relief Fund.

Though donations have made a critical difference, hardship and uncertainty continue for people facing unprecedented challenges.

How to Give The need for resources for local nonprofits serving our community remains stronger than ever. Your gift will make a difference.

100% of donations will be used for grantmaking.

- Make a secure online donation at cfmco.org/CovidRelief
- Mail check payable to "CFMC" with "COVID-19 Relief" in memo line to: 2354 Garden Road, Monterey, CA 93940
- Make an IRA Qualified Charitable Distribution
- Contribute stock or other assets



Call 831.375.9712 or visit cfmco.org/COVIDRelief to give or learn more.



Here for Good
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Donations to the COVID-19 Relief Fund of the Community Foundation for Monterey County are tax deductible. Tax ID #94-1615897.

Cover Photo Richard Green

March 2021

Community Fund for Carmel Valley Provides Relief

Fires from the Carmel Fire that blew through Carmel Valley and Cachagua in August 2020 torched homes and upended lives. But the strong community spirit of Carmel Valley, led by the new Community Fund for Carmel Valley, rallied around some 27 families, awarding \$173,000 to help them recover from the damage and recoup losses.

"Teamwork makes the dream work, in this case. The attitude and enthusiasm for helping neighbors helping neighbors, is joyous," said Alan Crockett, Community Fund for Carmel Valley Advisory Board Chair.

"This has been an enormous learning experience on how to quickly, nimbly be helpful when folks have lost so much. It's both heart wrenching and heartwarming. It's beyond just providing a check," he explained.

While Marco and Cristian Flagg could do nothing to stop the flames that engulfed their Sky Ranch area home in Carmel Valley, the timely support from the fund helped them with their plans to rebuild. Grant money was used to buy tools and to outfit a cabin they built in one day.



Cristian Flagg surveys the fire damage to his home

“The grant is much appreciated and the funds will be well used to support our rebuilding.”

—Cristian Flagg

"Following the fire, our property looked like a nuclear bomb had exploded there. Ashes, metal twisted and melted, foundation walls, remnants of the big upright logs of our log house lying like burned matches on the ground, a spooky forest of charcoaled trees. So, the first priority was a cleanup of our lot," Marco shared. "Cristian and I consider ourselves lucky. We are insured, and while the insurance is basic and will require our own labor and creativity to complete the job, we know we can and will get it done. The grant is much appreciated and the funds will be well used to support our rebuilding."

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.

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. To learn more or to give, visit cfmco.org/CarmelValley.

New Staff Join CFMC Team

2021 kicked off with three new additions to the CFMC team.

Kim Drabner was named Director of Finance. She comes from a background in public service at the county and municipal level, most recently as the Finance Director for the City of Seaside. Kim is a CPA and earned her MBA from the David Eccles School of Business at the University of Utah.



Esther Figueroa is the Scholarships and Community Impact Officer. She was College Readiness Advisor for the CFMC's College Futures Monterey County program at CSU Monterey Bay. She will lead the CFMC's scholarship programs and joins the Community Impact team.



Andrea Scott is Director of Gift Planning. She joins our Philanthropic Services team in a new position that will focus on working with donors on life income gifts, gifts of real estate and planned giving options.

Andrea previously worked as Senior Director of Development at the Boys & Girls Clubs of Monterey County.

COVID-19 Grant – Independent Transportation Network

COVID-19 rendered seniors homebound. As a vulnerable group, sheltering in place presented tremendous difficulties. They still had to eat, pick up prescriptions and attend doctors' appointments even in the midst of a global pandemic.

That's when the Salinas-based Independent Transportation Network (ITN) Monterey County went to work, using a \$20,000 COVID-19 Relief Fund grant to change its services, partnering with Meals on Wheels of the Salinas Valley to get seniors fed and driven to the essential places they needed to go.

"It's a unique time, we are all being asked to think creatively and respond to urgent community needs," said Jessica McKillip, ITN Executive Director whose board had an emergency meeting last year to authorize a change of its model of service. Under normal circumstances, ITN provides rides to those 60 and over or those visually impaired by its paid and volunteer drivers. Customers could call day or night for safe and reliable transportation.

Since ITN's customer base was asked to stay home, ridership dropped, putting its paid drivers at risk of no work. But Meals on Wheels had its own dilemma – how to get hot meals purchased for seniors from restaurants throughout Monterey County to meet its surging requests.

"Meals on Wheels had money to buy meals, but didn't have a way to meet the growing need," she explained, adding that Monterey-

Salinas Transit joined the partnership. "We coordinated independent efforts to get meals to the people that needed them. It was a fantastic partnership."

The grant provided operating support (staffing costs, mileage reimbursement, sanitation supplies) for the collaborative lunch delivery program that fed 280 seniors, many in rural parts of Monterey County, for 13 weeks. ITN also distributed disaster guides, masks, and food bags to sheltering seniors and provided COVID-safe, short essential errands.

ITN's next projects include getting seniors to vaccination appointments and reaching out to provide rides to seniors in rural parts of Monterey County.

"The grant allowed us to reach people who would have never known about our services, bridge gaps and build a collaboration that would likely have never happened," she said.

To see all grantees or give, visit cfmco.org/CovidRelief.



ITN Monterey County partnered with Meals on Wheels Salinas Valley to feed and transport seniors



**center for
nonprofit excellence**
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Nonprofit Finances in Uncertain Times

Nonprofits have shown adaptability, resilience, and commitment throughout the COVID-19 pandemic. With no playbook or knowledge of how long the crisis would last, many nonprofits faced programmatic and operational challenges head-on while keeping the community's broader well-being in focus. Board members remained engaged, and there are many examples of nonprofits planning, stewarding resources and activating creative partnerships. These themes are part of a report that looks at responses from over 200 nonprofits from March-October 2020. Read the full report cfmco.org/COVID19NonprofitResources.

Nonprofit finances have been impacted by many external forces and circumstances all at once. As the pandemic stretches on, financial challenges will be compounded for many nonprofit

organizations. But financial resiliency is not distributed evenly across the sector.

This Spring, our Center for Nonprofit Excellence will offer technical support and guidance for local nonprofits to build their understanding of key financial health indicators and get questions answered related to financial stability and shifting funding environments. CNE welcomes a team of experts from consulting firm BDO FMA to provide virtual workshops and individualized coaching. BDO FMA brings over two decades of experience providing fiscal management support to nonprofits and in 2020 with special attention to impacts of the pandemic.

Visit our website for details: cfmco.org/workshops.

This project is made possible in part with support from The David and Lucile Packard Foundation.

VIDA Community Health Worker Program Launched

Over 110 Community Health Workers (CHWs) are now available to help Monterey County residents where they live, eat, play, work and worship. In December, the County Board of Supervisors approved a \$4.9 million Community Health Worker program to reach residents most impacted by the pandemic. The county granted the funds to the CFMC, which quickly made grants to ten community-based organizations to provide outreach, education and wraparound support to prevent the spread of COVID-19.



Community health workers are trusted messengers to help residents access COVID-19 resources

The name of the program is VIDA which means Virus Integrated Distribution of Aid. CHW's are trained and equipped to deliver culturally-relevant messaging and assist community members with system navigation for access to resources. Participating organizations include: Building Healthy Communities, Centro Binacional Para El Desarrollo Indigena Oaxaqueño, CHISPA, Center for Community Advocacy, California Rural Legal Assistance, Mujeres en Acción, Lideres Campesinas, City of Gonzales, Pajaro Valley Prevention & Student Assistance and The Village Project. CHW's can help local individuals and families access rental and utility assistance, wage loss replacement, funeral expense support, basic needs, mental health services, employer advocacy and vaccination and testing appointments. Find more information at cfmco.org/VIDA.

VIDA is supported by the County of Monterey, Community Foundation for Monterey County, The David and Lucile Packard Foundation and Together Toward Health, a program of the Public Health Institute, through funding from a group of philanthropic organizations.



CFMC Welcomes New Board Members

The CFMC is pleased to announce the addition of Romero Jalomo, Adriana Melgoza and Jennifer Walker to its Board of Directors.



Romero Jalomo, a native of Wilmington, CA and 21-year resident of Salinas, is the Vice President for Student Affairs at Hartnell College, a role he has held since 2013. "To join such an influential group of individuals who serve to improve the quality of life for Monterey County residents is an honor that I greatly appreciate," said Romero, who is a steering partner with the Bright Futures Partnership of Monterey County and member of the Salinas Valley Promise Advisory Board.



Adriana Melgoza is Chief Programs Officer at the Watsonville Law Center and Co-Director of Diversity, Equity and Inclusion for Salud Para La Gente. Adriana, who grew up in Castroville, graduated from CSU, Monterey Bay with a major in Human Communications. Adriana is a graduate of the CFMC's Center for Nonprofit Excellence LEAD program for emerging nonprofit leaders. "I look forward to being part of efforts to lift our nonprofits and community," Adriana said.



Jennifer L. Walker, a native of Pittsburgh, Pennsylvania, is a shareholder in the Monterey-based law firm Leach & Walker. Jennifer is a Certified Specialist in Estate Planning, Trust and Probate Law pursuant to the State of California Board of Legal Specialization and is a member of the Trusts and Estates Section of the Monterey County Bar Association and the Monterey County Women Lawyers Association. "I am hopeful that by being part of such a diverse and dynamic group of community leaders, I will be able to actively support the local community that I care so much about," said Jennifer. Read more: cfmco.org/21Board.

2021 BOARD OF DIRECTORS

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Joe Pezzini
Francine Rodd
Bill Sharpe
Loren Steck
Abby Taylor-Silva
Jennifer Walker

Daniel R. Baldwin, President/CEO

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



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2354 Garden Road
Monterey, CA 93940
831.375.9712

Salinas Office
945 S. Main Street, Suite 207
Salinas, CA 93901
831.754.5880

cfmco.org
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Fire and COVID Relief
Stories

Caring for Community
Birt and Kathleen Johnson, Jr.

Welcome New Board and Staff

Fund for Monterey County



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Planned Giving on the Rise

The CFMC saw an increase in planned and estate gifts throughout 2020. For many donors the process of setting up a planned gift brings great peace of mind. It offers assurance that their charitable legacy will be carried out according to their wishes. A planned gift can help donors take advantage of gains in stock or real estate value and leave a charitable legacy. Some gifts offer income for life and create a fund to benefit the donor's favorite causes. Donors can also support changing needs through the Fund for Monterey County (See page 3). Popular planned gift options include:

- Direct bequests by will or trust
- Life-income gifts such as Charitable Remainder Trusts or Charitable Gift Annuities
- Naming the CFMC as a beneficiary of retirement, life-insurance or other financial account

Inspiring philanthropy is at the heart of the CFMC's mission. Exploring the options that are best for you can be accomplished simply and confidentially at no charge. For information or to receive a planned giving guide, call Christine Dawson or Andrea Scott at 831.375.9712 or explore giving options on the CFMC website at cfmco.org/PlannedGiving.



Amy Anderson and George Somero partner with the CFMC through their donor advised fund and through their estate plans. Read their story: cfmco.org/Anderson_Somero.

“Choosing the Community Foundation as a vehicle for our legacy giving reflects our confidence in the organization. We appreciate the fact that the Foundation will honor our intent.”

—Amy Anderson, Amy Anderson and George Somero Fund of the Community Foundation for Monterey County