

Giving Matters

SPRING 2022

COMMUNITY FOUNDATION FOR MONTEREY COUNTY NEWS



Here for Good
Community Foundation
for Monterey County



Record \$36 Million Granted

As 2021 began, we couldn't imagine the coming year would surpass the prior year in philanthropic impact. 2020 had set records, with the highest grant totals ever awarded in the Community Foundation for Monterey County (CFMC)'s history.

An incredible \$36 million was granted in 2021, far surpassing the \$27 million granted in 2020. This \$9 million increase brought the CFMCs cumulative grantmaking to more than \$260 million.

CFMC fund holders, contributors to the Monterey County Gives! campaign and many funding partners all played a part. Whether it was support from the Monterey County Board of Supervisors for the VIDA project, The James Irvine Foundation for inclusive economic development in Salinas or donor advisors directing grants to nonprofits of their choice, gifts

“ Gifts large and small worked together to fund critical needs and make a meaningful difference. ”

—Dan Baldwin, President/CEO

large and small worked together to fund critical needs.

The CFMC is grateful to the donors who partnered with us to help meet the needs of our neighbors. From youth programs, services for seniors and those without shelter, to arts, environmental causes and

COVID-19 Relief, hundreds of organizations were strengthened because of this invaluable support.

The CFMC is honored to partner with its many generous donors every year who help create healthy, safe and vibrant communities throughout Monterey County.

To learn how the CFMC can help you give back, call us at 831.375.9712 or visit cfmco.org/WaystoGive.

Support Extended for VIDA Community Health Worker Program



COVID-19 Vaccine and Testing Van

With a solid infrastructure that can quickly adapt when needed, the VIDA (Virus Integrated Distribution of Aid) community health worker (CHW) program has become a critical community resource for Monterey County. VIDA CHWs made testing sites their main focus during the month of January to support the drastic increase in need during the Omicron surge.

They created over 25 pop-up clinics, with a focus on accessibility, and tested more than 11,000 people. Their efforts helped break the chain of infection. VIDA will continue to remain vigilant and help keep the community prepared for any potential surges or new variants.

VIDA's strength is its empathy and responsiveness. For example, one CHW was sharing information with a woman who did not speak Spanish. *continued on page 7*

President's Message Staying Diligent

Two years ago none of us could have predicted how our lives would change. Terms like “shelter in place” now feel passe, even quaint, but we need to remember the cloud of anxiety under which we existed. We also can't forget the lives lost and how our most vulnerable populations were inordinately impacted.

Life and work changed for the Community Foundation for Monterey County, as well. Working remotely, the CFMC started the COVID-19 Relief Fund, which revealed again the remarkable generosity of the people of Monterey County. It raised and granted \$4.5 million.

“ I like to think philanthropy is in the ‘silver linings’ business. Things are looking better, but it took an all-in effort from across Monterey County. — Dan Baldwin, CFMC President/CEO ”

As 2020 went forward a need emerged around the creation of a space where representatives of our different economic and social sectors could come together, and problem solve collaboratively. This idea turned into the COVID-19 Collaborative (C19C). Representatives from hospitality, agriculture, health care, education, philanthropy and nonprofits expressed their challenges in a safe forum. This led to cross-sector problem solving on issues none of us had previously dealt with.

As the C19C was getting traction, the Monterey County Board of Supervisors voted \$4.95 million to implement a community



President/CEO Dan Baldwin at 2021
Celebration of Philanthropy

health worker program. The CFMC, in partnership with the Monterey County Health Department, agreed to administer the program at no fee. It

became known as VIDA. At its peak, VIDA employed 120 CHWs, folks who received health department training and came from within the hardest-hit communities. When information about mask wearing, quarantining, testing and access to services (including vaccinations) is being delivered by a trusted messenger, the results are astounding. VIDA also organized pop-up vaccination clinics across the county. Some of our most vulnerable neighborhoods achieved 100% vaccination.

VIDA administration required tremendous effort on the part of the CFMC, including the hiring of two project managers. The David and Lucile Packard Foundation provided grant funds that made this possible. VIDA also attracted a large federal grant. The Supervisors' original investment has seen more than a 100% match. A harsh lesson from the past two years is that we must stay diligent. The Supervisors recently approved funds that will extend VIDA through December 31.

I like to think philanthropy is in the “silver linings” business. Things are looking better, but it took an all-in effort from across Monterey County.

Monterey County Gives! Reaches \$9.7 Million



CFMC staff Sarah Elias, Clarisa Chisum, Gianna Yim and
Chalet Booker with MCGives! grant checks

Monterey County Gives! had another record year of generosity. Thanks to 7,539 donors, the 2021 campaign raised \$9.7 million to support more than 170 area nonprofits, surpassing last year's record by \$1.8 million.

The end-of-year giving campaign is structured to provide participating nonprofits a platform to share their “Big Ideas.” Organizations receive a pro rata match thanks to donors to the matching fund.

“The continuing generosity in Monterey County never ceases to surprise. The philanthropic spirit is making Monterey County stronger,” said Dan Baldwin, Community Foundation for Monterey County President/CEO.

Since launching in 2009, more than \$45 million has been raised and granted to hundreds of Monterey County area nonprofits. Learn more at mcgives.com.

MC GIVES!

MCGives! is a partnership of the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation with support from the Gunde and Ernie Posey Family Foundation, Neumeier Poma Investment Counsel, Colburn and Alana Jones Foundation of the CFMC, the David and Lucile Packard Foundation and the Cannery Row Company.

Here for Good
**Community
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for Monterey County

MONTEREY COUNTY
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PENINSULA
FOUNDATION**



VIDA Champions Recognized

In January 2022, the VIDA leadership team and VIDA community health workers recognized 25 individuals and organizations who contributed to the

success of VIDA and the health of the community during the COVID-19 pandemic.

VIDA is a \$6.5 million program funded by the County of Monterey in partnership with the CFMC, David and Lucile Packard Foundation and Public Health Institute. Community health workers are trained and equipped to deliver information, perform COVID-19 tests, register people for vaccinations and assist community members with access to resources.

These VIDA Champions added to and strengthened VIDA in a variety of ways including helping improve messaging, offering space or financial support, providing training, being guest speakers and contributing their time. Each Champion received a VIDA Champion keepsake and custom art piece created by local Latina artist Jasmin Arevalo.



These extraordinary individuals' contribution and support of our local response allowed VIDA to serve the most disparately-impacted communities during the pandemic.

“VIDA has been a huge success thanks in part to these VIDA Champions.”

—Dan Baldwin, CFMC President/CEO, COVID-19 Collaborative

VIDA Champions included:

(l to r from top) Supervisor Luis Alejo, Angelica Chavez, Anabel Farias for Enrique Mendoza/Santa Fe Foods, Supervisor Chris Lopez, Raymond Costa, Supervisor Mary Adams with Rosemary Soto, Lilia Chagolla, Hillary Fish, Moi and Tony Abdula/La Princesa Markets, Supervisor John Phillips and Supervisor Wendy Root Askew.

See all the VIDA Champions at cfmco.org/VIDA.

Participating VIDA Organizations

Building Healthy Communities • Centro Binacional Para El Desarrollo Indígena Oaxaqueño (CBDIO) • Center for Community Advocacy (CCA) • CHISPA • City of Gonzales Mujeres en Acción • Pajaro Valley Prevention & Student Assistance • The Village Project

Women's Fund Grants More than \$100,000

women's fund
of the community foundation
for monterey county

Although the CFMC could not hold its annual Women's Fund Luncheon due to COVID-19, donor investment continues to generate impact. Thanks to recent donations in combination with the Women's Fund endowment, the fund granted more than \$100,000 to five organizations in March 2022.

The power of these grants is evident. Shannon, an MPC student from Salinas and previous recipient, shared her appreciation:

"I had zero income due to losing my job from COVID-19 and I was constantly worried about how I would pay my rent, buy food, pay for car insurance, gas, textbooks, and personal hygiene items. This support tremendously affected my ability to focus on college. Thank you!"

Continuing its strategic planning goal of supporting women and girls in leadership and policy advancement, the fund was pleased



Women's Fund Leadership Council in March was hosted by Kim Negri at her home to review grants. (COVID protocols were followed.)

to award grants to the following organizations:

Boys & Girls Clubs of Monterey County for Girls' Health in Girls' Hands (GHGH) administrative hub support

GHGH Scholarships for participants in the GHGH Teen Leadership Network

Monterey Peninsula College Foundation for emergency assistance for women

Hartnell College Foundation for

emergency assistance for women and/or students who are mothers

Hartnell College Foundation for WELI (Women's Education and Leadership Institute)

This brings the cumulative grantmaking to \$2.3 million. To be a part of change for women and girls in Monterey County, visit cfmco.org/WomensFund or contact Christine Dawson at 831.375.9712 x126 for more information.

A Great Idea

The Jett Fighter Fund

Jett Ramsey loved rainbows, the color green and his pet rabbit, Pepper Pancake. His grandmother, Debbie Harlan, speaks warmly of watching him ride around in his little green Jeep the months before he passed away, at age 5, of pediatric brain cancer. "He loved that Jeep....he rode it around just everywhere in his pajamas. He was always wearing his pajamas."

Debbie established the Jett Fighter Fund in 2021 in honor of her grandson, who lost his battle to cancer on April 22, 2020. We met with Debbie on a warm spring day in Aptos to talk about Jett and the donor advised fund at the playground remodeled to celebrate his memory. The rebuild was a community fundraising effort supported by city council members, local celebrities, County park friends, local businesses and friends of the family. As we spoke, children ran by laughing, enjoying the beautiful new swings and play areas that just a few years prior had been a run-down, old playground.

“A lot of good came from this. It makes me feel better to know that something good could come out of something so bad.” —Debbie Harlan



Debbie Harlan honors her grandson's memory through the Jett Fighter Fund

"Jett was an enthusiastic boy. He was always laughing and playing," Debbie told us. "It was a great struggle for all of us, especially his parents, when he was diagnosed."

Debbie came to the CFMC on the advice of her professional advisor, Cris Cabanillas of Monterey Private Wealth. "I had a dream for a fund in Jett's name. I created the Jett Fighter Fund (the name captures Jett's fighting spirit) with the goal of supporting cancer research and organizations like Hospice and Jacob's Heart." Debbie will recommend grants from her donor advised fund to honor Jett's memory.

"A lot of good came from this. It makes me feel better to know that something good could come out of something so bad. In Jett's words, 'I have a great idea!'" Read Debbie's full story: cfmco.org/JettFighter.

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.

Agency Endowment Funds

Gateway Center of Monterey County
Max's Helping Paws Endowment Fund

Agency Stewardship Funds

First Baptist Church of Salinas
Stewardship Fund
Gateway Center Mary Lou Cortright
Memorial Legacy Fund

Donor Advised Funds

John and Nessie Cuda Family Fund
DeLay-Magnuson Foundation
Robert and Angela Kent Fund
Perry and Barbara Miller Family
Foundation Fund
Lee and Shirley Rosen Fund



Beverly and Stephen Zalan
(here with their grandson) established
the Zalan Family Scholarship Fund

Scholarship and Award Funds

Daphne and Stuart Wells Public Service
Scholarship Fund
Natural Disaster Support Scholarship Fund
Traven Tapson Foundation
Zalan Family Scholarship Fund

*Since November 2021

The Legacy Society Welcomes New Members

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

Yvonne A. Ascher

Peggy Downes Baskin

Jim and Marie Colbert

Gary O. and Diane Nelson

Karen Judkins and Steven Wade

Daphne and Stuart Wells

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.

Fund for Monterey County

A “Community Chest”

The Fund for Monterey County responds to the changing needs of our community. It is a permanent, endowed fund of the CFMC, invested to grow and grant in perpetuity. Made up primarily of estate gifts, it serves as a “community chest,” giving the CFMC flexibility to fund a wide variety of causes over time.

The Fund for Monterey County is composed of unrestricted and field of interest funds. With unrestricted funds, donors make gifts that allow the CFMC to invest in many aspects of community well-being and make grants to address Monterey County’s most pressing needs. With field of interest funds, donors identify the areas of most importance to them, such as youth or senior services, arts education or mental health.

The CFMC awards grants through a competitive process to nonprofit organizations through the Community Impact grants program. Grants support a wide variety of causes in five main areas: Children & Youth Development, Health & Human Services, Community Development, Arts, Culture & Historic Preservation and the Environment & Animal Welfare.

Thanks to donors to the Fund for 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 most flexible 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 will, trust or donor advised fund. The CFMC can provide you or your attorney with sample bequest language. Gifts to the Fund for Monterey County help fill the “community chest,” making sure the CFMC will be “Here for Good.” For more information visit cfmco.org/FundforMontereyCounty.



Grants support a wide variety of causes each year (above: Alliance on Aging)

Fund for Homeless Women 10 Years Strong

This year marks the 10th Anniversary of the Fund for Homeless Women. In 2012 co-organizers Michael Reid, Marian Penn and Kathy Whilden set out to bring attention to women living without adequate shelter in communities on the Monterey Peninsula. They partnered with the CFMC to create a fund.

Since then, the Fund for Homeless Women has made a significant impact in homeless services for women, awarding more than \$1.6 million in grants. It provided early grants and ongoing support to help start programs including Gathering for Women, I-HELP for Women, One Starfish Safe Parking Program, Women in Transition and Casa de Noche Buena. Established nonprofits such as Community Human Services and Housing Resource Center have also benefited from support.

The Fund for Homeless Women



“Dedicated to shelter, safety and community”

The fund commissioned the first assessment of women without shelter on the Monterey Peninsula and supported capacity building to facilitate the acquisition of safe, permanent housing.

Organizers increased public awareness and advocacy through meetings and fundraising events, raising more than \$2.2 million from approximately 800 individuals and businesses.

The total includes an endowed fund of more than \$250,000.

Donors to the fund are investing in services for women without shelter on the Monterey Peninsula. Gifts will be leveraged to provide support long into the future. Visit cfmco.org/FHW for information or to donate online. Contact Andrea Scott at 831.375.9712 x124 for gifts of stock or gift planning assistance.



Denese Sanders and Dan Baldwin at *Courage Within: Women Without Shelter* exhibition at the Monterey Museum of Art supported by the Fund for Homeless Women



center for
nonprofit excellence
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Getting Better Together

CNE Partners with Nonprofits as Staffing Challenges Abound

While the COVID-19 pandemic may not have created our region's staffing challenges, it has certainly exacerbated them for nonprofit employers eager to increase staffing or fill vacancies. Over one-third of respondents to Center for Nonprofit Excellence (CNE)'s recent nonprofit survey report that they don't have the necessary volunteers or staff to carry out their work.

“Staffing is our biggest challenge right now. Even jobs that were historically ‘easy’ to fill are staying open longer. Staff in programs that are short staffed are tired, some near burnout.” — Anonymous nonprofit

In 2022, the CNE is designing and delivering programs that address areas of need for our nonprofit community, including virtual workshops on staff retention and engagement plus hiring strategies.

The CNE survey also showed that 34% of nonprofits experienced a recent or upcoming leadership transition. This was true across nonprofits of all sizes. Many nonprofit executive retirements that have been anticipated for a decade or more are taking place seemingly at once.



Recorded and upcoming workshops and resources are available at cfmco.org/cne

CNE programs like the year-long LEAD Institute and a monthly virtual series, Tune in to Your Leadership Voice, emphasize growth and connection for rising leaders. Reid Norris, CNE's Leadership Development Specialist, interviewed nonprofit leaders for an upcoming report. It will feature tools and lessons learned to help navigate this time of profound change and opportunity.

“Selecting, hiring and successfully supporting a new executive is such an important challenge for an organization. It's a crucial time for the Center for Nonprofit Excellence to help lift up an inclusive next generation of nonprofit leaders and changemakers in our community,” said Reid.

Additional Support – Organizational Development Grants

CNE encourages nonprofits and community-based organizations to consider Organizational Development grant funding, especially as they take on internal projects to rebuild and strengthen from the pandemic. In 2022, special funding from the David and Lucile Packard Foundation make this support possible. Learn more at cfmco.org/ODgrants.

LEAD Institute Promotes Growth



LEAD Institute participants gather monthly for peer learning

This year, the CNE will support the professional growth of fifteen diverse and inspiring community leaders through the 2022 LEAD Institute. Representing organizations from Monterey, Santa Cruz and San Benito Counties, the cohort convenes monthly to engage in leadership learning, peer support and coaching. “Growth” was the theme of the April session, and “LEADers” explored topics including identifying a Core Focus for program impact, addressing workplace issues in a solutions-oriented way and how to run a great team meeting. Volunteer coaches contribute essential support to the program by pairing with LEAD participants throughout the year-long program to identify goals, values and growth opportunities.

Applications for the 2023 LEAD Institute will open this fall. Tuition is sliding scale, and scholarships are available. If you'd like to learn more about the program, please get in touch with Reid Norris, Leadership Development Specialist at CNE, at reidn@cfmco.org or visit cfmco.org/LEAD.

Support Extended for VIDA, *continued from page 1*

Another CHW noticed her confusion and spoke with her in her native language of Mixteco. The CHW was able to address her concerns so she and her family got vaccinated. She later contacted the CHW when her pregnant daughter tested positive for COVID-19. The CHW encouraged her to call the doctor and

“VIDA is Monterey County doing what we do best to take care of one another. —Supervisor Askew”



Many VIDA CHWs go above and beyond to help their community

offered to test the 11 people living in the same house. She told her about quarantine protocols and connected them with alternative housing to isolate safely. The CHW brought food and other essentials to the rest of the family. This is just one of hundreds of examples of the care and compassion shown by the CHWs when connecting people with much-needed resources. On March 8, 2022, the Monterey County Board of Supervisors voted to extend VIDA through December 31, 2022.

CFMC Welcomes New Board Members

The Community Foundation for Monterey County is pleased to announce the addition of Jesse Lopez, René Mendez, Larry Oda and Tyller Williamson to its Board of Directors.



Jesse Lopez, born and raised in South Monterey County, is the Managing Partner of Bianchi, Kasavan & Pope, LLP. A CSU Fresno graduate, he was treasurer of Monterey County Agricultural Education,

Inc., Sun Street Centers, Center for Community Advocacy and Partners for Peace and is currently the board vice-chair for Rancho Cielo. “I am excited and honored to become a member of this organization,” said Jesse.



René Mendez has been Gonzales City Manager since 2005 and serves on the boards of United Way Monterey County, Hartnell College Foundation and the Advisory Council of the

Institute of Innovation and Economic Development in the College of Business at CSU Monterey Bay.

Mendez holds a BA in Economics from CSU Stanislaus, and an MA in Public Policy from Duke University. He states, “I look forward to working with the Board and staff to carry out the core mission of the Foundation to inspire philanthropy and act as a catalyst for strengthening communities throughout Monterey County.”



Larry Oda, a third generation Japanese American, was born in a Justice Department Internment Camp in Crystal City, Texas. He is Chair Emeritus of the National Japanese American Memorial Foundation and served as the

National President of the Japanese American Citizens League. He is a Trustee of the Big Sur Land Trust and has served on the National Board of the Buddhist Churches of America (BCA) and as President of the BCA Coast District Council.

A Vietnam veteran, he earned his Bachelors and Masters degrees from CSU Fresno. “I am proud of the work the CFMC continues to accomplish and humbled to be a part of the process,” said Larry.



Tyller Williamson, Monterey City Councilmember since 2018, serves as Human Resources Specialist at the Naval Postgraduate School. He earned his Bachelors in Human Communication, Pre-Law from

CSU Monterey Bay and an MBA from the Naval Postgraduate School. He is a co-founder and Co-Chair of Monterey Peninsula Pride and leads the Monterey Peninsula Housing Coalition. “The CFMC,” said Tyller, “is an example of ethical work that produces tangible results in our community.”

2022 BOARD OF DIRECTORS

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Kirk Gafill, *Vice Chair*
Jan Vanderbilt, CPA, *Treasurer*
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Salinas Inclusive Economic Development Initiative (SIEDI) convening (l to r) UCSC students Dario Leon and Kayla Gomez with Professor Chris Benner, UCSC Sociology and Environmental Studies and Director of the Institute for Social Transformation. Learn more: cfmco.org/SIEDI. "This is OUR economy, not the economy. Economies are made not by nature but by people through collaboration." – Chris Benner

New Guide Simplifies Gift Planning

The new CFMC "Create Your Legacy" Guide to Gift Planning reviews the many options and benefits of different types of gifts. The guide is designed to help donors consider ways to give during their lifetime or through their estate, including:

- Donor advised funds
- Gifts of appreciated stock or real estate
- Life Income Gifts - Charitable Gift Annuities (CGAs) or Charitable Remainder Trusts (CRTs)
- IRA Qualified Charitable Distributions
- Gifts of Life Insurance or retirement plans
- Bequests

Contact Andrea Scott at andreas@cfmco.org or 831.375.9712 x124 to create your giving plan or request a copy of the guide. To download or view the guide online, visit cfmco.org/GiftPlanning.



I feel peace of mind knowing that even if I'm not here, I will have left behind a small part of me for my son. I was pleasantly surprised by how fast and easy it was to set up a CGA. I'm really glad this organization is here.

– Maria Salazar Segovia, Legacy Society member

