



# CONNECTING *for Good*



*Here for Good*

**Community Foundation**  
for Monterey County

**VISION**HEALTHY, SAFE, VIBRANT  
COMMUNITIES**MISSION**TO INSPIRE  
PHILANTHROPY  
AND BE A CATALYST  
FOR STRENGTHENING  
COMMUNITIES  
THROUGHOUT  
MONTEREY COUNTY

# Table of Contents

1	Message to the Community	18	Inspiring Philanthropy -
2-3	Connecting for Good		Philanthropic Services
4	COVID-19 Relief Fund	19	Giving Local - John and
5	Giving Together -		Annette Romans
	Record \$36 Million Granted	20	Community Impact Investing
6-8	Grantee Stories	21	Community Leadership
9	Monterey County Gives!	22	Building Economic Vibrancy
10	COVID-19 Collaborative	23	Power of Partnership -
11	VIDA Community Health Worker Program		Center for Nonprofit Excellence
12	Northern Monterey County Foundation	24	Leaving a Legacy - Legacy Society
13	Southern Monterey County Foundation	25	Fund for Monterey County
14	Community Fund for Carmel Valley	26	Fund Stories
15	Weston Call Fund for Big Sur	27-31	Family of Funds
16	Siembra Latinos Fund	32-33	Financials
17	Scholarships - Connecting Students	34-35	Leadership - Board and Staff
	with Opportunity	36	Gratitude - Committees and In Memoriam

## 2021 FAST FACTS

**\$385  
MILLION**

Total Assets

**\$44.8  
MILLION**

Gifts Received

**\$36.6  
MILLION**

Record Grants

**\$9.7  
MILLION**Raised for 170 nonprofits  
through Monterey County  
Gives!**\$1.5  
MILLION**

Awarded in 390 Scholarships

**2,192**

Grants Distributed

**49**

New Funds Established

cover photo VIDA Community Health Workers

# Message to the Community

While it may seem 2021 was a blurry twin of 2020, it stands out as another impactful year at the Community Foundation for Monterey County (CFMC). This report will highlight record grantmaking, a record Monterey County Gives! campaign and record year-end assets. And not just squeaking past previous highs; 2021 far surpassed totals from 2020 and before.

Beyond data points, however, is a somewhat intangible set of accomplishments, ones that may be even more important relative to our community leadership, impact and mission delivery. The CFMC has always had a strong identity in grantmaking, stewardship of assets, relationships with the donor community and being here for fires and other urgent needs. We hope this identity never wavers.

In 2021, the CFMC elevated its leadership role when it formed the COVID-19 Collaborative (C19C), filling a critical community void. The C19C created a table at which leaders in different sectors from across Monterey County could discuss and solve COVID-related issues, whether about access to testing and vaccinations, CDC guidelines, best practices and bringing in needed resources. The C19C had representation from education, healthcare, government, hospitality, agriculture, philanthropy and the nonprofit community.

Separately (but connected), we also agreed to administer the community health worker program that became VIDA (Virus Integrated Distribution of Aid). This was funded by a bold \$4.9 million allocation from the Monterey County Board of Supervisors. The David and Lucile Packard Foundation supported our administrative role, allowing us to hire project managers for testing/vaccination programs and VIDA.

The outcomes were remarkable. C19C members collaborated with much-needed nimbleness to get information and resources in all parts of the County, whether it be workplaces, schools or homes. VIDA's community health workers helped across the County, but especially neighborhoods and communities that were most vulnerable at the onset of the pandemic. Remarkably, some of these achieved 100% vaccination rates.

*Connecting for Good* accurately reflects our role in 2021. We gained skills in many new areas, skills that will be used again and again. We are, after all, *Here for Good*.



Teri Belli  
2021/2022 Chair, Board of Directors



Daniel R. Baldwin  
President/CEO



“

**CONNECTING FOR GOOD  
ACCURATELY REFLECTS OUR  
ROLE IN 2021.**

**WE GAINED SKILLS IN  
MANY NEW AREAS,  
SKILLS THAT WILL BE USED  
AGAIN AND AGAIN.  
WE ARE, AFTER ALL,  
HERE FOR GOOD.**

– Teri Belli  
CFMC Board Chair







# Connecting for Good

## Creating Healthy, Safe, Vibrant Communities

When reflecting on the work of the Community Foundation for Monterey County in 2021, a continuing theme emerged: the power of connection. In this report you'll see how the impact of the CFMC extends throughout Monterey County, connecting people, resources and organizations in many ways.

You'll read how the foundation connects donors with important causes. Thanks to their support, the CFMC deployed a record \$36 million in grants to nonprofit organizations working throughout Monterey County and beyond. A primary focus was on supporting agencies helping our communities recover from the lasting effects of the COVID-19 pandemic.

You'll learn how the CFMC's leadership of the COVID-19 Collaborative and management of the VIDA Community Health Worker program helped people in Monterey County access testing, vaccines and sources of support.

You'll see how Monterey County Gives! offers donors a way to match their giving to their interests and connects local nonprofits with new supporters. The program, a partnership of the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation, eclipsed previous records in money raised.

Additionally, regional affiliate and special purpose funds strengthen and connect communities in defined geographical areas, including Northern and Southern Monterey County, Big Sur and Carmel Valley, by making grants to benefit their communities.



Beyond grantmaking, you'll see how the Center for Nonprofit Excellence links nonprofits with training, resources and professional development through online workshops and leadership programs.

You'll read how the CFMC's Community Impact Investment program connects small businesses and entrepreneurs with loans and training that they might not otherwise receive. The CFMC also partners with generous individuals, families and businesses to provide \$1.5 million in scholarships to give local students opportunities to pursue their academic goals.

Lastly, you'll learn how the CFMC offers donors ways to make a lasting impact through charitable gift planning. Whether you are someone who wants to make a difference through your giving, or part of a nonprofit organization working to improve the quality of life in our region, the Community Foundation is here to connect you with the resources you need to help strengthen communities throughout Monterey County.



**THE IMPACT OF THE CFMC  
EXTENDS THROUGHOUT  
MONTEREY COUNTY.**

# Pandemic Relief



## COVID-19 Relief Fund

Thanks to CFMC fund holders, foundations and community giving, the CFMC's COVID-19 Relief Fund awarded \$880,000 in 2021, topping \$4.1 million in cumulative grants.

The Relief Fund deployed the majority of grants to nonprofits that serve vulnerable populations by providing basic needs including food, housing, living expenses, transportation costs and direct support related to financial need.

The Relief Fund awarded additional funds to agencies for operating support as well as programming addressing the mental health-related impacts of COVID-19. Grants also supported proactive COVID-19 prevention and recovery, including education and vaccination efforts.

Local nonprofits have been incredibly resilient in their response to the COVID-19 pandemic. We applaud the adaptability and tenacity of these grantees and all the nonprofits who served our community during this time of extraordinary challenge.

△ Montage Health Foundation vaccine clinic  
 ▽ (l to r) Community Homeless Solutions, Kinship Center, Salvation Army Monterey Peninsula Corps

## 2021 COVID-19 Relief Fund grantees

- AIM for Mental Health
- ALS Association Golden West Chapter
- American Cancer Society
- American Red Cross of the Central Coast
- Arts Council for Monterey County
- Breast Cancer Assistance Group of Monterey County
- Catholic Charities of the Diocese of Monterey
- Center for Community Advocacy (CCA)
- CHISPA
- Community Association of Big Sur
- Community Bridges
- Community Homeless Solutions
- Coalition of Homeless Services Providers
- Dentistry 4 Vets
- Franciscan Workers of Junipero Serra
- Foundation for Monterey County Free Libraries
- Hartnell College Foundation
- Immigrants Rights Counsel
- Jacob's Heart Children's Cancer Support Services
- Jews Christians Muslims United
- Kidpower Teenpower Fullpower
- Kinship Center
- Lambourne Institute for Life Mastery
- Martha's Kitchen
- Meals on Wheels of the Monterey Peninsula
- Mee Memorial Hospital
- Montage Health Foundation
- Monterey Peninsula Chamber of Commerce
- National Center for Youth Law
- Order of Malta Western Association
- Palenke Arts
- St. Vincent de Paul Society, Sacred Heart Parish
- Salvation Army, Salinas Corps
- United Way Monterey County



# Giving Together

## Record \$36 Million Granted

In 2021, the CFMC awarded a record \$36 million through 2,192 grants in Monterey County and beyond. The CFMC makes grants to nonprofits working in the areas of health and human services, children and youth development, arts and culture, historic preservation, community development, education, the environment, animal welfare and disaster relief. (See grant details page 33.)

CFMC donor advisors directed more than \$10.8 million while donors to the 2020 Monterey County Gives! campaign funded \$7.6 million in 2021 grants. CFMC discretionary grants were funneled through the CFMC's diverse grantmaking programs, each addressing the different facets of community need.

The principles of diversity, equity and inclusion (DEI) are part of CFMC's discretionary grantmaking criteria. This includes the Community Impact grantmaking guidelines, which were revised to include an emphasis on racial equity. In an effort to increase access and reduce barriers, the CFMC is focused on increasing unrestricted operating support grants, expanding multi-year grants and the continuation of the Small CI grantmaking program.

Community Impact grants respond to a wide array of local needs. Thanks to generous donors who supported the Fund for Monterey County (see page 25), nonprofit organizations can request grants each year for operating and programmatic support, new efforts or capacity building improvements.

2021 recipients include Harmony At Home for young mothers, Health Projects Center for operating support, Hope Services for Homestart Early Intervention Services,



Pacific Grove Museum of Natural History for exhibit curriculum design, and Girls Inc. of the Central Coast for after-school youth development programs.

The CFMC also carries out the wishes of donors who established field of interest funds to address a particular purpose. Examples include the Stephen and Madeleine Conran Fund that makes grants supporting children and seniors in need, and the Jean P. Fitton Fund, which supports programs for public K-12 teachers' professional development. (See page 6.)

The COVID-19 Relief Fund awarded grants to help serve vulnerable populations, address growing mental health challenges and support proactive COVID-19 recovery, including education and vaccination and testing efforts.

We are grateful to our donors, partners and nonprofit groups for supporting our community's resilience in this time of ongoing challenge and uncertainty. This scale of impact is only made possible by the many people who have partnered with the CFMC over the years to effect positive change.



**WE ARE GRATEFUL TO OUR DONORS,  
PARTNERS AND NONPROFIT GROUPS FOR  
SUPPORTING OUR COMMUNITY'S RESILIENCE IN THIS  
TIME OF ONGOING CHALLENGE AND UNCERTAINTY.**

– Laurel Lee-Alexander  
Vice President of Community Impact



# Grantee Stories

## COVID-19 Relief Grant - \$30,000 to AIM for Mental Health curriculum and toolkit

Pandemic stressors contributed to an ongoing mental health crisis amongst children and young adults. Mental health supports are typically underfunded, and the issue continues to have a negative stigma. Since its incorporation in 2015, AIM for Mental Health has focused on the mental health of children, teens and young adults by funding clinical research to find better treatments and cures, raising awareness and improving access to effective treatments.

AIM for Mental Health used a \$30,000 grant from the COVID-19 Relief Fund to curate innovative curriculum and a toolkit – “The Lab” – deployed to participating schools and community-based organizations to help redress mental health concerns. The Lab served 500 middle and high school students from 20 schools in Monterey County. They use the virtual platform to have open discussions with youth to talk about mental health concerns and use technology driven interventions to help them address anxiety, mood disorders and other mental health challenges. The CFMC thanks the donors to the COVID-19 Relief Fund who make this kind of work possible.



^ Youth researchers present findings at AIM program

## Opportunity Grant - \$5,000 to Sol Treasures for Día De Los Muertos Procession in King City

After a pandemic related hiatus, Día de Los Muertos, An Illuminated Procession returned to King City in November 2021. Sponsored by Sol Treasures and supported by a \$5,000 Opportunity Grant, this multi-day celebration of local Hispanic culture included an open-air market, food, music, arts workshops, dance and performances, culminating in a lighted procession.

Expanded in 2021 in collaboration with Central Coast VNA and local businesses, the project strives to educate, increase tolerance and build bridges by promoting multicultural experiences and teamwork. Sponsor Sol Treasures' mission is to awaken and nurture appreciation and passion for the arts in people of all ages in South Monterey County and provide a home for creative and inspiring opportunities to unify the community through art and culture.



^ Sol Treasures Día de los Muertos An Illuminated Procession

## Jean P. Fitton Grant - \$14,000 to Salinas Union High School District for Salinas Community Science Workshop

Middle school teachers struggle to deliver quality hands-on lessons while attempting to cover all the elements of the Next Generation Science Standards (NGSS) and prepare for state examinations. The Community Science Workshop, funded in part by a \$14,000 Jean P. Fitton Grant, helps meet this challenge. Recently opened at El Sausal Middle School, the program is a vital resource for teachers at this and neighboring schools, providing support for science teachers to use engaging hands-on activities to convey the content of the NGSS.

Components of the program include development and distribution of activities and materials, professional development sessions with teachers and staff, classroom visits and support and the development and implementation of assessment activities. Activities include creating working catapults, trebuchets and fun chemical reactions, making electromagnetic devices and working models of the solar system and building wave and geologic motion demonstrations. Projects take place with 7th and 8th graders at El Sausal and La Paz middle schools.





## Monterey County Fire Relief Grant - \$70,000 to CERV for families affected by the River Fire

The CFMC partnered with Community Emergency Response Volunteers of the Monterey Peninsula (CERV) to provide financial assistance to individuals and families affected by all three 2020 wildfires. This grant helped families affected by the River Fire clean their properties, work collaboratively to develop solutions to mitigate against future mudslides and debris flows and document the process for future use. A previous Monterey County Fire Relief Fund grant of \$120,000 allowed CERV to provide financial assistance to 12 families for recovery from damage caused by the mudslides and debris in January 2021.

CERV was established in 2012 to promote and sustain preparedness, readiness and response to critical events. CERV manages MontereyCoRecovers, which supports emergency recovery and relief efforts related to disasters. The CFMC is grateful to the fund's many donors who provide resources for fire relief and recovery in Monterey County. See all grants at [cfmco.org/FireReliefGrants](https://cfmco.org/FireReliefGrants).



^ CERV volunteers

## Community Impact Grant - \$25,000 to Independent Transportation Network for rides for seniors and visually impaired adults

Independent Transportation Network (ITN) Monterey County provides a community-based, community-supported, economically viable, consumer-oriented and quality transportation service for seniors and adults with visual impairment. It is modeled after a national program where volunteers provide rides in their own cars.

More than 40 volunteers provide 800 rides a month to ITN's 510 members mostly around the Monterey Peninsula and Salinas. ITN hopes to increase membership in Castroville, Carmel Valley, Prunedale, Salinas and Salinas Valley and to recruit new volunteers from Salinas and rural areas.

Although medical appointments are the most common reason for rides, the \$25,000 grant helped fund ITN's core mission of making rides available any time, every day for any reason. The CFMC supports ITN's success in making Monterey County more accessible to all.



^ ITN Monterey County provides transportation with dignity

## Community Impact Grant - \$25,000 to Big Sur Health Center for operating support for clinical staff salaries during the COVID-19 pandemic

The Big Sur Health Center (BSHC) serves the health and wellness needs of the Big Sur community. It provides quality healthcare through traditional and complementary approaches that are culturally sensitive and patient-centered. BSHC serves approximately 1,600 Big Sur residents and employees a year, with an average of 3,500 patient visits. It is the only health care facility for 100 miles on the coast, providing preventive and routine care as well as emergency services.

A \$25,000 grant provided operating support to help BSHC retain its staff to serve the needs of the community through the COVID-19 pandemic. As of May 2022, BSHC has vaccinated over 1,000 individuals, provided nearly 2,000 onsite COVID tests and distributed over 2,000 free rapid antigen home test kits to the community. The CFMC is proud to support BSHC and community health in Big Sur through the pandemic and beyond.



^ Big Sur Health Center Executive Director Sharen Carey

# Grantee Stories

## Community Impact Grant - \$30,000 to MEarth for environmental stewardship and programming for youth

A community is neither safe nor vibrant if the natural environment is unhealthy. The CFMC is proud to support programs that connect Monterey County residents with opportunities to care for our planet. MEarth is the perfect example. With a mission of educating and inspiring through environmental stewardship, the Carmel nonprofit offers diverse environmental programs for youth and adults alike.

MEarth received a \$30,000 Community Impact grant to support their environmental stewardship programs, serving 85 youth through Summer Service Camp, Afterschool EcoLiteracy Virtual Series and Empowering Healthy Choices program with Girls' Health in Girls' Hands and Community Partnership for Youth. Thanks to MEarth for connecting residents with environmental wellness opportunities.



^ MEarth Summer Service Camp

## Community Impact Grant - \$35,000 to Health Projects Center for operating support for elder care services in Monterey County

Elder care is an essential component of a healthy and vibrant community. The CFMC is committed to supporting projects and programs that connect Monterey County seniors with quality care. Health Projects Center (HPC) is one such program. Supporting people as they age to live safely at home, they deliver high quality services and programs in Monterey for senior citizens, health care workers and caregivers.

HPC received a \$35,000 Community Impact grant to support operating expenses that will benefit more than 800 Monterey County residents. The HPC developed culturally appropriate outreach materials, expanded Spanish language online services, trained staff and invested in mobile workforce technologies. Thanks to these services and others like them, 95% of clients report that "the assistance I receive helps me to remain at home." HPC delivers measurable results to positively impact the lives of senior citizens in Monterey County.



^ Health Projects Center

## Community Impact Grant - \$10,000 to MY Museum for reimagining operations to better serve youth

The pandemic made it difficult for families to find creative outlets for play. Opportunities for social and emotional development were limited, and the CFMC invested in organizations envisioning new and creative ways of solving this challenge. Monterey County Youth Museum (MY Museum) received a \$10,000 Community Impact grant to help fill this need.

MY Museum reimagined its space and programs with hands-on learning (play, exercise and interaction), Fun on the Run classes and workshops in public places such as parks and PLAY Pods (social learning groups) for over 3,500 children ages 0-8. The grant supported staff and educator salaries, a cloud-based registration process and COVID cleaning protocols and materials. The CFMC is proud to help MY Museum make a difference for children and their parents.





# Connecting Donors with Good Causes

## Monterey County Gives!

Monterey County Gives! began in 2009. Its skyrocketing growth has far surpassed all expectations. "To see the arc of the campaign and its acceleration over the past few years – none of us saw this coming," said Dan Baldwin, CFMC President/CEO.

The end-of-year campaign provides participating Monterey County nonprofits a platform to share their "Big Ideas" and raise money to support these efforts. A pro rata match is made possible by generous foundations, businesses and CFMC donor advisors.

MC Gives! raised \$9.7 million in 2021 to support 170 area nonprofits all thanks to 7,539 donors. This remarkable outpouring of generosity, a 22% increase over last year, set a new record and continues a trend of growth.

The CFMC presented special \$1,000 grants to Peace of Mind Dog Rescue for most donors and Monterey Peninsula Pride for most young donors ages 18-35. The Florence Haspel Zeve Award for leadership and ingenuity impacting women, families, education and the arts went to the Henry Miller Memorial Library.

In lieu of the Big Idea Award, the CFMC awarded \$1,000 each to 12 organizations to support youth mental health and arts groups during the pandemic: Alisal Center for Fine Arts, Hijos del Sol, Ariel Theatrical, Marina Youth Arts, MY Museum, Guitars Not Guns, Palenke Arts, Orchestra in the Schools, Sol Treasures, Youth Orchestra Salinas, Youth Arts Collective and Youth Music Monterey County.

MC Gives! is a partnership of the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation with major 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, the Cannery Row Company and CFMC donor advisors. Since launching in 2009, MC Gives! raised and granted more than \$45 million to hundreds of Monterey County area nonprofits.



## FAST FACTS

**\$9,715,153**  
Total Donations

**170**  
Participating Nonprofits

**7,539**  
Donors

**\$45 MILLION**  
Raised Since Launch

**MONTEREY COUNTY GIVES!**  
Joining Together for Big Ideas



**MC GIVES! CHANGES  
SO MANY LIVES IN  
MONTEREY COUNTY. IT IS  
A BEAUTIFUL THING.**  
– Dan Baldwin



# Connecting Stakeholders for Community Health

granted \$173,000 to support the drastically increased need for testing during the Omicron surge. Together Toward Health, a program of the Public Health Institute, awarded the CFMC \$100,000 to support the mobile health clinic, which is a partnership between UC Berkeley, Innovative Genomics Institute (at UC Berkeley), VNA, Mobility Health and the CFMC. In addition to financial resources, the COVID-19 Collaborative was able to obtain PPE and COVID-19 at-home tests to distribute throughout Monterey County.

Thanks to the unprecedented level of cooperation and collaboration, the COVID-19 Collaborative helped mitigate the effects of the pandemic in Monterey County, especially for the most vulnerable communities.

## COVID-19 Collaborative

The COVID-19 Collaborative is a countywide, multi-sector collaboration that addresses COVID-19 and its impacts on our community. By advancing a coordinated action plan driven by science and best practices in public health and equity, it gave sectors that would not normally work together a chance to discuss critical issues and share resources.

As the pandemic shifted, so did the COVID-19 Collaborative and its work groups. Originally, participants discussed how to help people quarantine and obtain needed resources. Over time, stakeholders worked on how to deploy vaccines to areas that had not been covered, developing different strategies to help increase vaccine acceptance.

The Communications Work Group met regularly to develop coordinated approaches. The group created an online toolkit of updated graphics and sent regular emails to more than 200 organizations to amplify and extend the reach of timely messages. Sharing graphics through partner channels resulted in increased clinic attendance.

The COVID-19 Collaborative's scope and diverse participants attracted additional funding and resources from outside partners. The David and Lucile Packard Foundation awarded the CFMC a \$1.3 million grant to support COVID-19 efforts throughout the county. Central California Alliance for Health

## COVID-19 Collaborative Accomplishments

- Supported the VIDA Community Health Worker Program to promote trusted messengers. Provided additional resources and leveraged partnerships to secure new locations for community health workers to be positioned.
- Set up COVID-19 testing sites throughout the county, including assisting schools when needed.
- Placed a major bulk order of COVID-19 tests when tests were difficult to secure, allowing cities and school districts to receive a discount. The CFMC provided the funds to make this happen in a matter of days.
- Coordinated vaccination clinics to ensure countywide equitable access.
- Developed an online communication toolkit that provides culturally relevant COVID-19 messaging.
- Presented free webinars geared toward local small business that helped them navigate COVID-19 regulations.



**THE COLLABORATIVE HAS BEEN AN INVALUABLE PARTNER IN HELPING MONTEREY COUNTY NAVIGATE THE IMPACTS OF COVID-19. GOVERNMENT, PRIVATE COMPANIES AND NONPROFITS CAME TOGETHER TO TAKE CARE OF OUR MOST VULNERABLE COMMUNITIES.**

– Janine M. Chicourrat

Managing Director, Portola Hotel & Spa at Monterey Bay





# Connecting People with Resources

## VIDA Community Health Worker Program

The VIDA (Virus Integrated Distribution of Aid) program exemplifies the power of connection. Its mission is to help diminish the spread of COVID-19 in areas of Monterey County most affected by the virus. Community Health Workers (CHWs) are a bridge, connecting people with accurate information, access to vaccines and testing, and vital programs and resources.

CHWs offered education and combatted misinformation on vaccine safety. They clarified changing guidelines on masking and quarantine procedures, provided testing and vaccine assistance and made referrals to wrap-around services related to COVID-19 such as mental health resources, rent relief, food distribution and alternate housing to isolate safely. VIDA held an average of 23 no-cost COVID-19 testing sites across Monterey County every week. When community members tested positive, CHWs quickly offered emotional support and isolation services.

Professional stakeholders trained CHWs to provide the best education possible. When rapid testing became available in June of 2021, VIDA workers became California State certified testers, after extensive training built on safety, privacy and efficiency. Rapid testing provided results in 15 minutes instead of three to five days, allowing people to return to school or work sooner if results were negative.

CHWs provided outreach at multiple locations including vaccine clinics, stores, community events and agriculture fields. In July 2021, VIDA launched a six-week campaign where CHWs went door to door encouraging people to get vaccinated. They reached vulnerable communities in South County, Salinas, North County and the Peninsula. They knocked on 25,811 doors, held 13,839 conversations and scheduled nearly 1,100 vaccine appointments.

Asking for help can be difficult, but VIDA's constant presence in the community helped break down barriers. CHWs earned the community's trust by offering compassion and empathy in addition to resources. "It's hard to access resources, especially for underrepresented populations. They now feel safe coming to us," said Monica Rico, City of Gonzales CHW. "It's more than COVID-19, people trust us with other struggles they are experiencing and we're able to refer to them to the right organizations."

The ten 2021 VIDA partner organizations were: Building Healthy Communities, California Rural Legal Assistance, Centro Binacional Para El Desarrollo Indígena Oaxaqueño, Center for Community Advocacy, CHISPA, City of Gonzales, Lideres Campesinas, Mujeres en Acción, Pajaro Valley Prevention & Student Assistance and The Village Project.

Led by the CFMC in collaboration with the Monterey County Health Department, VIDA is funded by the County of Monterey, the CFMC and private foundations. VIDA was supported by the David and Lucile Packard Foundation and Together Toward Health, a program of the Public Health Institute, as well as the Central Coast Alliance for Health and a Federal Health and Human Services Grant award to the Monterey County Health Department. The Monterey County Board of Supervisors voted to extend the VIDA program funding through December 31, 2022.

### VIDA Fast Facts

- 125 CHWs from 10 organizations at its peak in 2021
- 396,000 interactions with individuals around the county
- 10,000+ vaccine supports and 100+ vaccine and testing clinics hosted
- 130,000 education materials and resources provided
- 3,300 needs addressed for those in isolation or quarantine
- 21,000+ COVID-19 rapid antigen tests administered

▼ VIDA CHWs at work: vaccine clinic, agricultural field, testing site



# Connecting Communities



“

**THE NORTHERN MONTEREY COUNTY FOUNDATION  
IS A UNIQUE WAY TO FOCUS SUPPORT TO  
BENEFIT OUR NEIGHBORS AND OUR COMMUNITY.**

– Chuck Allen

NMCF Advisory Board Chair



## Northern Monterey County Foundation

A group of longstanding community members created the Northern Monterey County Foundation (NMCF) in 2016 as a way to utilize local philanthropy to bring positive change to the communities of North Monterey County. The NMCF makes grants to benefit the residents of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita.

The NMCF granted \$31,500 to 11 nonprofit organizations in 2021. Special Kids Connect, a resource center for children with developmental disabilities, received a grant for their Ability-Inclusive Afterschool REACH Art program for youth with special needs in Santa Rita.

“REACH Art is intentional in its promotion of inclusion and social skills development. These are critical needs for youth with disabilities as we recover from the pandemic,” said Lori Luzader, Executive Director of Special Kids Connect.

The NMCF granted \$160,000 in its first five years to 22 nonprofits. It is an affiliate fund of the CFMC.

### 2021 Grantees

- **AIM for Mental Health** for a youth program to ignite mental health advocacy and elevate student voices in research
- **Central Coast VNA & Hospice** to provide Tdap vaccinations for North Monterey County Schools
- **Coastal Kids Home Care** for health and mental health care for children and teens
- **Farm Discovery at Live Earth** for farming and distribution of produce and nutrition education for North Monterey County Residents in need
- **Girls Incorporated of the Central Coast** for empowering girls in Castroville to resist peer pressure to engage in unhealthy behaviors
- **Monterey Bay Fisheries Trust** for a lost gear recovery project cleaning the bay to prevent entanglements with marine life
- **Pajaro Valley Shelter Services** for coordinated economic development and tenant education for families in Pajaro
- **Partnership for Children** for access to medical care for children with serious illnesses and family support
- **Prunedale Senior Center** for efforts at improving the quality of life for North Monterey County seniors
- **Special Kids Connect** for an ability-inclusive afterschool art program for youth with special needs in Santa Rita
- **Wonder Wood Ranch** for equine therapeutic services for North County foster kids

## FAST FACTS

**2016**

Year  
founded

**\$31,500**

Granted  
in 2021

**11**

Organizations  
supported

**\$160,000**

Total granted  
since inception



## Southern Monterey County Foundation

The Southern Monterey County Foundation (SMCF) gained momentum in 2021, granting \$25,300 to 14 organizations in South County. 2021 grantmaking was supported in part by Chevron.

Grantee King City Boxing Club is a youth sports organization that teaches life skills. "Our vision is to help the kids stay off the streets, try to be a better person and do the right things," said Rudolfo Tapia, Head Coach. "Without the SMCF, it would be very hard for us to help the kids."

The SMCF has granted \$168,000 since inception to organizations providing community-based services aimed at improving the quality of life for Southern Monterey County residents.

"Grants from our foundation have made an amazing impact, from purchasing science kits for youth in San Ardo, providing free legal services for South County seniors to supporting youth sports and arts," said Jamie Jones, 2021 SMCF Advisory Board Chair.

The SMCF provides an opportunity for donors to pool philanthropic resources to strengthen communities from King City to points south. It is governed by an advisory board of area residents who have a deep understanding of community needs. It is an affiliate fund of the CFMC.

“

**THE SOUTHERN MONTEREY COUNTY FOUNDATION IS ABOUT PEOPLE HELPING PEOPLE.**

– Rob Cullen

SMCF Advisory Board member

### 2021 Grantees

- **City of Greenfield Community Science Workshop** for hands-on science enrichment
- **City of King Recreation Department** for the 2022 swimming lesson program
- **Girls Inc. of the Central Coast** for after school communications workshops for elementary school girls
- **Jacob's Heart Children's Cancer Support Services** for support services and a transportation program
- **King City Boxing Club** for providing positive alternatives for youth in the community
- **King City in Bloom** for King City Park concession stand murals
- **Kinship Center for Placement Program** for helping foster children find forever families
- **Monterey College of Law** for South County Access to Justice to build on their pilot program
- **San Antonio Community Betterment** for improvements to the community center
- **Sol Treasures** for the Production Team Youth Stage Program and workshops resulting in a youth produced performance
- **Monterey County Animal Rescue** for the Feral Cat Spay and Neuter Project
- **Southern Monterey County Memorial Hospital dba Mee Memorial Hospital** for the Broadway Clinic Renovation and Restoration Program
- **Special Kids Connect** for the Spring Resource Fair for special needs families
- **The Parenting Connection of Monterey County** for parenting and postpartum support for teen mothers in King City



## FAST FACTS

**2014**

Year founded

**\$25,300**

Granted in 2021

**14**

Organizations supported

**\$168,000**

Total granted since inception

# Connecting Communities



“

THE CFCV SEEKS TO IMPROVE THE LIVES OF  
OUR FELLOW COMMUNITY MEMBERS,  
BOTH NOW AND IN THE FUTURE.

– Alan Crockett

CFCV Advisory Board Chair



## Community Fund for Carmel Valley

The Community Fund for Carmel Valley (CFCV) offers residents, businesses and organizations an opportunity to contribute to the greater good of others. In response to the Carmel Fire in 2020, the fund deployed \$188,000 in grants to nonprofits providing direct financial assistance to affected residents, most of whom lost their homes.

In 2021, the CFCV, an affiliate fund of the CFMC, granted \$29,242 to nonprofits focusing on projects and programs benefiting Carmel Valley communities from Highway 1 to Cahoon Grade. Ten nonprofits received grants in areas such as education, safety, meals for families, youth camp scholarships and other community-enhancing programs.

Cachagua Fire Protection District received a grant for safety gear for volunteers. “The safety equipment will allow the department to better serve the entire Cachagua community, including the hundreds of people going to and from work, those who enjoy our area for recreation and those just passing through. The grant will contribute to the safety of the volunteers as they respond to vehicle and medical emergencies,” said Don Bonsper, Treasurer.

### 2021 Grantees

- **Breast Cancer Assistance Group of Monterey County** for special needs assistance
- **Cachagua Fire Protection District** for safety gear for responding volunteers
- **Carmel Valley Angel Project** for food and gifts for families
- **Carmel Valley Art Association** for relocation and website development
- **Carmel Valley Community Youth Center** for water safety instruction
- **Friends of Cachagua Children’s Center** for Cachagua summer camp for K-8 youth
- **The Jamesburg School** for critical maintenance for community-building and educational programming
- **Meals on Wheels of the Monterey Peninsula** for the home delivered meals program
- **MEarth** for camp scholarships for Carmel Valley youth
- **UC Berkeley – Hastings Reserve** for Environmental Education in Cachagua: People of Color Engaging in Nature

## FAST FACTS

**2020**

Year  
founded

**\$29,242**

Granted  
in 2021

**10**

Organizations  
supported

**\$217,242**

Total granted  
since inception



## Weston Call Fund for Big Sur

The Weston Call Fund for Big Sur was established in 2018 in memory of Weston Call to improve, protect and preserve the special character of the Big Sur community. The fund granted \$37,500 in 2021 to nonprofits that focus on projects and programs that benefit Big Sur residents from Mal Paso Creek to the Monterey County line. The fund previously granted \$43,797 for fire relief for the Dolan Fire through its Big Sur Disaster Relief Fund.

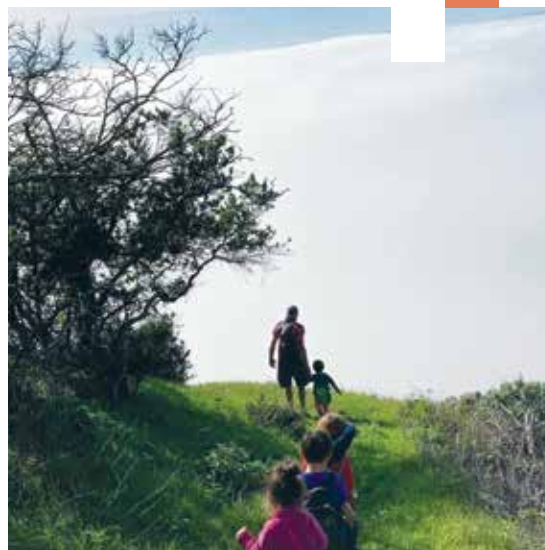
Big Sur Park School received a grant to help make nature-based preschool available to all children. "The school cultivates respect and connection for our vast natural and human resources in its youngest members of our community through their lived experiences and contact with all the elements of the earth," said Sofia Naomi Snavelly, Director of Big Sur Park School. "As children get deeper in the dirt, their personal responsibility for this land roots into their connection to it and is grown from play, care and curiosity."

The fund makes grants in the following priority areas: Health, Safety, Education, Arts, Culture, Community Stewardship and Disaster Relief. The Weston Call Fund for Big Sur, a special purpose fund of the CFMC, granted \$81,297 since inception.

“ “

**WE'RE EXCITED TO SUPPORT NONPROFITS  
SERVING BIG SUR RESIDENTS.  
OUR GOAL IS TO BUILD THE FUND TO PROVIDE  
NEEDED GRANTS INTO THE FUTURE.**

– Brian Call  
Advisory Board Chair



### 2021 Grantees

- **Arts Council for Monterey County** to partner with Captain Cooper School to provide a two-week Summer Arts camp and year-long arts education
- **Big Sur Byway Organization** for administrative support to implement Big Sur Coast Highway Management Plan
- **Big Sur Fiddle Camp** to produce a CD and theater show with Fiddle Camp students, faculty, and local actors
- **Big Sur Land Trust** to support the Land Stewardship Program at Glen Deven Ranch in Big Sur
- **Big Sur Park School** to provide scholarships to preschoolers to receive an outdoor education experience
- **CERV of the Monterey Peninsula** to purchase needed equipment for the Big Sur Community Emergency Response Team
- **New Camaldoli Hermitage** for upgrades and repairs to trails, benches and meditation points serving their 20,000 annual visitors
- **Ventana Wilderness Alliance** to create and print a Pine Ridge Trail visitor guide to teach responsible recreation in Big Sur

## FAST FACTS

**2018**

Year  
founded

**\$37,500**

Granted  
in 2021

**8**

Organizations  
supported

**\$81,297**

Total granted  
since inception

# Lifting up the Latino Community



Reflecting on SLF's impact, Alexis Garcia-Arrazola, Advisory Board member, stated, "You cannot hope to build a better world without helping those around you. Siembra uplifts voices and ensures that through a collaborative effort, we can do our part in making our communities stronger than ever."

## Siembra Latinos Fund

A group of local Latino leaders created the Siembra Latinos Fund (SLF) in 2017 to improve the quality of life for Latino residents of Monterey County. "Siembra" means "to sow" and the fund seeks to grow opportunity and expand programs and services that help build stronger communities. It is a field of interest fund of the CFMC.

The SLF lifts up the Latino community by investing in mental health, economic development and education. The Fund awarded \$23,000 to six nonprofit organizations in 2021 for projects and programs serving Latino residents throughout Monterey County.

Grantee Digital NEST works to connect youth living in agricultural areas of Salinas and North Monterey County to skill-building opportunities, transforming participants into professionals who can create successful careers, innovative solutions and prosperous communities.

"As our youth master new knowledge and gain skills, they build the confidence to thrive in the workforce and lead their communities to a prosperous future," said Jacob Martinez, Digital NEST Founder/CEO.

## 2021 Grantees

- **Digital NEST** for a computer literacy and skills program for youth in Salinas and Watsonville
- **First Night Monterey** for the Greenfield Cultural Arts Program
- **King City Boxing Club** for positive activities for youth in King City
- **Salinas Community Science Workshop** for its Saturday School Science Workshop
- **Santa Cruz Community Ventures** for an economic recovery of rural Monterey County Latinos
- **YWCA Monterey County** for youth education and advocacy

“

**SIEMBRA UPLIFTS VOICES AND ENSURES THAT THROUGH A COLLABORATIVE EFFORT, WE CAN DO OUR PART IN MAKING OUR COMMUNITIES STRONGER THAN EVER.**

– Alexis Garcia-Arrazola  
SLF Advisory Board member

## FAST FACTS

**2017**

Year  
founded

**\$23,000**

Granted in 2021

**6**

Organizations  
supported

**\$132,000**

Raised since  
inception



# Connecting Students with Opportunity

## Scholarships

Jay Zavala-Albor is a freshman at Cal Poly San Luis Obispo studying Environmental Engineering. A recipient of two CFMC scholarships, Jay (who goes by gender neutral pronouns they/them) is interested in studying methods of reducing damaging pollutants in our oceans.

“Oh my gosh,” Jay said about the Monica Abbott and College Futures scholarships she received, “These scholarships have made a HUGE difference for me. They have lifted such a weight [off my shoulders], so I can just focus on my studies.”

Jay’s studies are ambitious. They are primarily interested in remediation – cleaning up after disaster zones, pollution – and specifically, researching eliminating harmful microplastics from the oceans and water waste management.

“The environment is super, super important,” Jay told us. “The ocean is one of the world’s most important ecosystems, since most of the world is ocean, so taking care of the oceans helps take care of us.”

Jay’s broad perspective leads to a deep interest in small details, especially the mathematics involved in their major. “I’m finding at this point that my math classes are hugely relevant to real-world changes – for example, I can use this type of math to determine the amount of water that will fit in a tank. I really enjoy all of my classes.”

Jay also shared that, in their free time, they spend most of their energy with Cal Poly’s Society of Environmental Engineers, who meet twice a month making connections

within the professional field. Jay said it helps them to have a better understanding of the possible careers they could have in the future.

“Knowing that I don’t have to worry about paying for books, and can be involved in activities like this in my spare time, is so amazing,” said Jay. “It’s definitely been a blessing. I feel scared when I think about the future, but knowing that I can make a difference is comforting. Whatever work I end up doing will be passed on to the next generation.”

The CFMC is proud to support Jay and students like them. The CFMC manages 65 named funds established by individuals, families and businesses who recognize the value of education and want to create opportunity for local students.



“

**KNOWING THAT I DON’T HAVE TO WORRY ABOUT PAYING FOR BOOKS, AND CAN BE INVOLVED IN ACTIVITIES LIKE THIS IN MY SPARE TIME, IS SO AMAZING. IT’S DEFINITELY BEEN A BLESSING.**

– Jay Zavala-Albor

## FAST FACTS

**\$1,580,017**

Total amount  
awarded

**390**

Total number  
of scholarships

**65**

Total number  
of scholarship funds

# Inspiring Philanthropy



Some key questions to consider are: What do I want my giving to accomplish? What am I passionate about? What are my key values? How does my giving reflect the legacy I wish to leave?

Everyone has a unique motivation for giving. Debbie Harlan wanted to memorialize her grandson, Jett, who lost his battle to brain cancer at age five. She came to the CFMC on the advice of her professional advisor, Cris Cabanillas of Monterey Private Wealth.

Debbie worked with Christine Dawson to help create a donor advised fund in Jett's honor. The Jett Fighter Fund helped refurbish a playground and will help children in similar situations by supporting nonprofits providing pediatric care, especially for cancer.

"I had a dream for a fund in Jett's name. I created the fund with the goal of supporting cancer research and nonprofits that help families. I like to think that Jett inspired me. It's comforting to know that something good could come of something so bad," said Debbie.

The CFMC's new "Create Your Legacy" Guide to Gift Planning helps simplify your giving. It reviews the benefits of different ways to give, including donor advised funds, charitable remainder trusts or charitable gift annuities, IRA qualified charitable distributions and bequests.

Creating a giving plan can help you achieve meaningful impact with your philanthropy. Please contact us at 831.375.9712 or [legacy@cfmco.org](mailto:legacy@cfmco.org) to learn more.

## Philanthropic Services

A key part of the Community Foundation for Monterey County's mission is to inspire philanthropy. One way the Philanthropic Services team helps donors meet their philanthropic goals is by creating customized giving plans. CFMC staff provides strategic guidance and can research areas of interest and identify grantmaking opportunities.

"We can help you enhance your philanthropy and develop your unique philanthropic vision," said Christine Dawson, Senior Vice President of Philanthropic Services.

The CFMC can guide you through the process of exploring the values that inform your giving, share new and emerging giving opportunities and deepen your understanding of the issues, nonprofits and communities you care most about. The Philanthropic Services team also works with families to involve multiple generations in philanthropic planning.



**WE CAN HELP YOU ENHANCE YOUR PHILANTHROPY AND  
DEVELOP YOUR UNIQUE PHILANTHROPIC VISION.**

– Christine Dawson

Senior Vice President of Philanthropic Services



# Giving Local

## John and Annette Romans

We recently met John and Annette Romans on a warm afternoon in Greenfield at Annette's childhood home where her mother still lives. John and Annette were both born and raised in Monterey County, attending Greenfield Elementary School and King City High School.

Married 47 years, Annette was a school nurse in Greenfield and John farmed with others, including his father, before farming on his own. John was a longtime partner of King City-based Mission Ranches, which partnered with the owners of Earthbound Farms in 2008 to bring more organic produce to retail.

John and Annette often contributed their time, talent and in-kind donations when they were younger. After the success of Mission Ranches, they were looking to expand their generosity and give back financially. John was referred to the Community Foundation for Monterey County by a business partner. They created the Mission Ranches Fund of the CFMC in 2016 and have made grants to local nonprofits including Tatum's Garden Foundation, Salinas Valley Fair, Central Coast VNA and Hospice, and First Tee of Monterey County.

In 2020, he and Annette established the John and Annette Romans Family Fund to simplify their personal giving. "I like working with the CFMC. The investments are strong and the money grows," noted John. "I can just call and a check goes out (to the nonprofit)," he continued. Although they have also made grants in nearby communities, their priority is supporting organizations within Monterey County. "We like giving here," said Annette. "We like that it stays local."

The Romans appreciate history and contributed to the Campaign for the Preservation of Mission San Antonio. They support education, including Palma High, where their two boys attended, and Sacred Heart Schools, where two of their five grandchildren go to school. John, a Hartnell College Foundation board member, was recently honored for his ongoing support of Hartnell College. "We wanted to give where people of all ages can go get an education," he said. They also make grants to organizations making a difference for youth such as Girls Inc. and Rancho Cielo.

The couple utilized both their family donor advised fund and Mission Ranches Fund at the CFMC to support the COVID-19 Relief Fund in 2020, which made grants to organizations addressing community needs during the pandemic. The Romans also give back through the Southern Monterey County Foundation of the CFMC to support organizations serving King City south to the Monterey County line.

Of their giving, Annette says, "We're on the same page. We're glad we can do it and it's nice to know that every gift matters."



^ John and Annette Romans  
give where they live

“

**WE LIKE GIVING  
HERE. WE LIKE  
THAT IT  
STAYS LOCAL.**

– John and Annette Romans  
Mission Ranches Fund  
John and Annette Romans  
Family Fund



^ Javier Zamora  
JSM Organics, FarmLink client

# Expanding Impact

## Community Impact Investment

The CFMC continually looks for ways to deepen its community impact. The Community Impact Investment (CII) program is a way to utilize the assets of the foundation beyond grantmaking for the good of the community.

The CII initiative was created in 2018 to strengthen communities through investments. Impact investments are not grants. They are placements of capital intended to bring market or near-market returns. An allocation for CII is included in our Investment Policy Statement as part of the fixed income asset class. “While a fairly small allocation, it means CFMC investment dollars are being placed locally, addressing local issues, and still bringing a competitive return to the portfolio,” explained Dan Baldwin, CFMC President/CEO. “If CFMC assets can assist in building stronger communities, help people achieve their economic goals and receive a return, everyone wins.”

Initially the CFMC used Community Development Financial Institutions (CDFIs) as intermediaries, rather than making direct loans. The CFMC committed \$750,000 to California FarmLink and \$1,000,000 to Accion Opportunity Fund for low cost loans to small businesses. The CFMC investment portfolio will receive a guaranteed rate of return from these organizations.

FarmLink, which connects the next generation of sustainable farmers and ranchers with land and financing, reports that the CFMC loan allowed them the flexibility to respond to the evolving economic impact of COVID-19. During the first half of 2021, this investment supported 20 loans to primarily Latina and Latino farm businesses in Monterey County, providing necessary relief to weather the ongoing economic shock from the pandemic.

Accion Opportunity Fund provides flexibly structured financing to small business owners in underserved communities operating in Monterey County who would otherwise have difficulty securing financing. They made 34 loans in 2020 and two loans in 2021 and anticipate increased demand. They serve lower-income minority business owners and entrepreneurs.

In 2021, the CII committee authorized a \$500,000 loan for Mission Economic Development Agency (MEDA) for El Pajaro CDC Fondo Adelante to provide financing to underserved businesses in Monterey County. In 2021, the committee approved a \$250,000 loan to Community Housing Improvement Systems & Planning Association (CHISPA) for predevelopment costs for an affordable housing project in King City. CFMC will continue to work with CHISPA to identify potential opportunities for funding collaboration on other housing development projects.

Most recently, the CFMC approved a loan of \$1,000,000 to the United Way of Monterey County towards the purchase of the Community Impact Center in Salinas. The CFMC will continue to look for ways to broaden and deepen its impact through the CII program.

“

**THANKS TO THE CFMC'S INVESTMENTS, SMALL FARMERS LIKE ME RECEIVE SUPPORT AND CAPITAL TO ESTABLISH OUR OWN BUSINESSES. OUR FARMS' SUCCESS MAKES LOCAL COMMUNITIES STRONGER.**

— Javier Zamora

Owner, JSM Organics, FarmLink client, Member USDA National Organic Standards Board



# Community Leadership

## Inspiring Philanthropy. Strengthening Communities.

The four pillars of the CFMC's strategic plan are Community Impact, Philanthropic Leadership, Community Leadership and Organizational Excellence.

Community impact is achieved by creating more healthy, safe, vibrant communities across Monterey County, primarily through grantmaking. To achieve philanthropic leadership, the CFMC inspires and facilitates philanthropy. The foundation strives for organizational excellence by optimizing performance and stewardship to maximize impact.

Although the CFMC served in leadership roles throughout its history in a variety of ways, the board added Community Leadership to the 2015 Strategic Plan to codify the foundation's role in recognizing and acting upon opportunities to facilitate solutions to community issues.

A prime example of the CFMC's unique role in the community began in late 2020 when the CFMC was asked to lead the COVID-19 Collaborative (see page 10). This gathering of professionals across sectors was the first time that representatives from government, education, tourism, agriculture and medical entities coalesced to address the common goal of reducing the impact of COVID-19 throughout the community.

The Monterey County Board of Supervisors recognized the CFMC for its COVID-19 Relief Fund, which granted \$4.1 million, its leadership of the COVID-19 collaborative, its partnership in the VIDA Community Health Worker Program to mobilize community health workers and its Community Impact Investment program to help small businesses not eligible for PPP and other CARES act benefits.



The CFMC also brings together government and nonprofit leaders and stakeholders around the area of homelessness and continues to be involved by serving on the Leadership Council, the governing body of Monterey and San Benito Counties' Continuum of Care.

CFMC staff serve on boards at the local, state and national levels. For example, Laurel Lee-Alexander is Secretary of the Community Foundation National Standards Board and Christine Dawson is a board member of the Association of Fundraising Professionals (AFP) Monterey Bay. Dan Baldwin serves on the League of Californian Community Foundations Public Policy committee and the National Steering Committee for the Community Foundation Awareness Initiative. The CFMC is exploring ways to advocate effectively to further strengthen communities throughout Monterey County.

The CFMC board is committed to the principles of diversity, equity and inclusion. They formed a board/staff DEI work group to examine how these principles can be expressed throughout the organization and plan related board training for 2022. To further these goals, the Center for Nonprofit Excellence offers programming and resources to build the effectiveness of nonprofits and groups working to advance racial and economic equity.



**THE CFMC IS HERE TO GRANT, GROW AND  
LEAD. WE EMBRACE THIS LEADERSHIP ROLE  
IN PARTNERING WITH OTHERS TO SOLVE  
COMMUNITY PROBLEMS.**

— Dan Baldwin  
CFMC President/CEO



# Building Economic Vibrancy

## Partnering with The James Irvine Foundation

The James Irvine Foundation (JIF) chose to partner with the CFMC to invest more than \$5 million in programs supporting the Salinas community. The first initiative granted \$1.25 million in 2018 to ten Salinas-based organizations over three years. The groups met

for training and peer learning and worked with assigned mentors to strengthen their organizations' community engagement, leadership and economic vitality.

The second initiative granted \$1 million in 2020 to El Pájaro Community Development Corporation and California Coastal Rural Development Corporation (Cal Coastal) to provide revolving microloan and entrepreneurship programs benefiting low-income residents of color in Salinas interested in becoming entrepreneurs and/or growing their small businesses.

The newest initiative, CFMC's Salinas Inclusive Economic Development Initiative (SIEDI), allocated \$3 million over two years to nine nonprofits collaborating on inclusive recovery and economic development efforts. The SIEDI cohort began meeting in December 2021.

Participants include ALBA (Agriculture and Land-Based Training Association), Building Healthy Communities, CCA (Center for Community Advocacy), Centro Binacional Para El Desarrollo Indígena Oaxaqueño (CBDIO), Hijos del Sol, Loaves, Fishes & Computers (LFC), Monterey Bay Central Labor Council, Mujeres en Acción, and Rancho Cielo.

SIEDI offers an opportunity for community organizations to think differently about how the Salinas economy can support people who live here. At an April 2022 meeting, representatives from each community organization, mentors, CFMC staff, project managers, partner UC Santa Cruz and SIEDI advisory cohort members gathered to discuss and workshop visionary ideas for reinventing the Salinas economy.

Maria Rodriguez, of Mujeres en Acción, stated that the gatherings feel "inclusive – they are helping me to develop my leadership skills." Chris Brown of ALBA noted the diversity of the program. "I think we're often all stuck in our own worlds [in the work we do]," he said. "This is an opportunity to get different perspectives and think bigger." Jose Garcia of CCA noted the good that can come of bringing people together under one roof: "These conversations really bring us all together."

“ “

**THIS IS AN OPPORTUNITY TO  
GET DIFFERENT PERSPECTIVES  
AND THINK BIGGER.**

– Chris Brown  
Executive Director, ALBA

^ Leaders from ten organizations  
celebrate the impact of the first JIF initiative

## FAST FACTS

**\$1.25  
MILLION**  
to 10 nonprofits  
for community engagement  
and economic vitality

**\$1  
MILLION**  
to two  
microloan programs

**\$3  
MILLION**  
to nine community  
organizations  
for inclusive economic  
development





# Power of Partnership

## Center for Nonprofit Excellence

The Center for Nonprofit Excellence (CNE) believes in the power of partnership. By investing in the development of local leaders and dynamic organizations, the CNE helps build connections in Monterey County.

“When we think of the climate emergency unfolding all around us,” said Nancy Faulstich, Executive Director of Regeneración, “what is more important than building trusting relationships?” In 2021, Nancy and her team of committed climate activists in Pajaro Valley decided the time was right to allocate critical time and resources to improve the budgeting, financial tracking and funding capacity of their growing grassroots organization. Regeneración connected with CNE’s “Resilient Nonprofit Finances in Uncertain Times” to invest in organizational capacity and develop financial management tools through interactive learning and one-to-one coaching with nonprofit experts.

CNE empowered local activists and change-makers to build connections in other ways as well. Seasoned executives and new leaders found refuge and fellowship in the “Tune in to Your Leadership Voice” series.

Nonprofit staff and board members came together to create action plans to realize greater equity and inclusion in organizational structures, programs and practices at Diversity, Equity and Inclusion Trainings hosted by CNE.

Organizational Development grants provided essential funding to invest in mission impact and sustainability for nonprofits doing inspiring work in communities throughout Monterey County.

For Regeneración, committing to financial sustainability and strategic development is about “reclaiming power,” said Faulstich. “It’s an ongoing process of empowering our organization and the people touched by our mission. We’re building trust by showing that we can bring in funds and execute projects for the community.” Faulstich founded Regeneración to envision a more sustainable planet for her children and the environmental legacy they will inherit. Likewise, the Center for Nonprofit Excellence hopes to strengthen communities and inspire philanthropy for generations to come.



**WHEN WE THINK OF THE CLIMATE EMERGENCY UNFOLDING ALL AROUND US, WHAT IS MORE IMPORTANT THAN BUILDING TRUSTING RELATIONSHIPS?**

— Nancy Faulstich  
Executive Director, Regeneración



^ 2021 Diversity, Equity and Inclusion training participants

## FAST FACTS

**154**

workshop participants

**1**

**NEW POSITION  
ADDED**

Leadership Development Specialist

**143**

organizations  
served

**100%**

virtual programming

**6**

**NONPROFITS  
CONNECTED**

with in depth coaching from  
national experts in nonprofit finance

# Leaving a Legacy

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

## Legacy Society Members

Anonymous (6)	Wallace F. and Lucille Davis*	Holly and Jeff Haynes Peter* and Jacqueline Henning	Laurel Lee-Alexander Pam and Gifford Lehman	Charles Olvis and Miranda Morris	Elizabeth Stacey and Wayne Peter Marien
Mrs. Wilber K. Amonette*	Christine Dawson	Joseph and Elizabeth Heston	Jennifer Levey	Mike and Mary Orradre	Jean Stallings
Tonya and Rick* Antle	John and Gail Delorey	Carol and Don Hilburn	Jack and Angeleke Levy	Richard Ruh and Wendy Palmer	Loren Steck and Annette Yee Steck
Yvonne A. Ascher and Leonard Laub	Martin Dodd*	Peter Hiller and Celeste Williams	David S. and Norma Lewis	Nicholas M. Pasculli	Richard Hobley and Deborah Steel
Nancy Ausonio	Meg Donat	Jeffrey and Amanda Holder	Esther H. Lindsey*	Ken Petersen	Tom Sweeney
Tony Ayres	Natasha M. Doner	Jeanne S. Holmquist*	Robert H. Lindsey	John Phillips and June Dunbar Phillips	Lawrence A. Tartaglino
Daniel R. Baldwin and Anne Ylvisaker	Dr. William Donovan	Tom Hopkins	Janette Loomis	Gregory A. and Winoma Plaskett	Robert and Leslie Taylor
Robert P. Balles	William and Nancy Doolittle	Robert and Millie House	Todd Lueders	Judy Sulsona and Bill Rawson	Fredrick W. Terman and Nan Borreson
Nancy L. Bartell	Julie Drezner	Chris and Tola Hubbard	Valera W. Lyles	Rex* and Joan Reade	Shirley Thackara*
Peggy Downes Baskin	Stephen Eimer and Kevin Ann Cartwright	Kip and Jay Hudson	Tom and Kathy Macdonald	Donna Hart Reid	Michael and Cindy Lee Thatcher
Lisa Bennett and Robin White	Frances H. Elgan*	Vince Huth	John and Ann Mahoney	Eugene and Maya Rizzo	Brian Thayer
John B. Bergin*	Bertie Bialek Elliott	Gloria and Michael Ipson	Jan and Tannie Mandel*	Michael Reid and Bill Robnett	Peter and Anne* Thorp
Paul P. Bianchi	Norma Esselstyn	Dee Irvine	Roger and Carolann Manley	Paul Rochester*	Vincent and Evelyn Torras*
Nancy Beltzer	Catherine Kobrinsky	Jack Jewett	Michael and Tobi Marcus	Lee and Shirley Rosen	William H. and Susanne S. Tyler, III
James W. Bogart	Evans	Craig and Christine Johnson	Joseph A. and Sheila Mark	Jean Rudolph* trustee, The Lauralie Irvine Foundation	Patricia Tynan-Chapman
Thomas Bohnen	Lowel I. Figen*	Mark and Susan Johnson	Dr. William McAfee*	James C. Sanders*	William Umeki
Stephen and Barbara Brooks	Cyrus and Jean Fitton*	Joanne Taylor Johnson	Jan McAlister	John C. Sanders	James R. Valentine*
Jay and Ann Brown	Anne R. Fitzpatrick	Colburn and Alana Jones	Sherrie McCullough	Kenneth C. Schley	Jan Vanderbilt
Joseph and Betty Chaffers*	Sandra Forman	Joanne K. Juarez	Terry A. McHenry and Joan Smith McHenry	Steven Paul Schmidt	Robin Venuti and Joseph Rock*
Mishka Chudilowsky and Henry Azama	Crawford E. and Linda P. Foy	Karen Judkins and Steven Wade	Thomas D. Melville	Maria Salazar Segovia	Arlene Wall
Mary J. Clapper*	Susie* and Charly Franklin	Deborah Juran	Lenore Meyer*	Carol Shade*	Daphne and Stuart Wells
Jim and Marie Colbert	Joan M. Franz	William and Cheryl Kampe	Malcolm* and Joanne Millard	JeriAnn Shapiro	Jacqueline Wendland
Arthur Connell*	Allen Fuhs*	Karen D. Kadushin	James and Barbara Miller*	Connie Shelstad	Benjamin and Mary Ann Whitten
Julie Conrad	John and Laura Gamble	William and Cheryl Kampe	Robert B. Sheppard*	Robert B. Sheppard*	Nels P. and Jill Wiegand
Joyce Blevins and Katherine M. Coopman	Joel S. and Dena Gambord	Mary Ann Kane	Mimi Sheridan	Janet L. Shing	Martin R. Wolf
Julie A. Cason and Lisa K. Crawley	James and Jeri Gattis	Rick and Martha Kennifer	Janet L. Shing	Laura Sinks	Kenneth and Mary Wright
Leland and Gloria Dake*	Donald* and Frances Gaver	Capt. Steven D. Kesseling and Jean M. Forrest	Mary Skipwith	Mary Skipwith	Richard Zahm*
Robert N. Danzinger and Martha Drexler	Kevin Gilman	Alice V. Kinsler	Sidney Sue Slade	Sidney Sue Slade	
Lynn	Lupe Gomez*	Mary Koch	Madison Smith*	Madison Smith*	
Margaret D'Arrigo-Martin	Rodney Guilfoil*	Paul Lawrence* and Marion Buccafurni	Pamela D. Smith*	Pamela D. Smith*	
Larry Davidson and Beverly Dekker-Davidson	Terry Haber*	Douglas C. Lee	Charles* and Leslie Snorf	Charles* and Leslie Snorf	
	Bernard E. Hanly		George Somero and Amy Anderson	George Somero and Amy Anderson	
	Ruth Hartmann		David and Maryanne Spradling	David and Maryanne Spradling	
	Peter C. Hatton				
	Virginia O. Hawes				
	Dick Hawkinson*				
	Thomas Hawley				

\*In Memoriam

✓ 2020 Legacy Society Luncheon



# Fund for Monterey County

## Responding to Changing Needs

The Fund for Monterey County responds to the changing needs of our community. It is a collection of permanent, endowed funds 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 address a broad range of current and future needs.

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 via a competitive process to nonprofit organizations through the Community Impact grants program.

Grants support a wide variety of nonprofit organizations working in these main areas: Children & Youth Development; Health & Human Services; Community Development; Arts, Culture & Historic Preservation; the Environment; and Animal Welfare.

Unrestricted gifts provide the most flexible philanthropic resources to meet challenges now and in the future. Thanks to donors to the Fund for Monterey County, the CFMC was able to provide both pandemic and fire relief. Building the fund will ensure the CFMC can respond to emerging needs.

Donors can invest directly in the Fund for Monterey County by giving now 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 provide the grantmaking power to make sure the CFMC will always be "Here for Good."



## Become a Legacy Society Member

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

## Ways to Leave a Legacy

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



## Guide to Gift Planning

The new Guide to Gift Planning helps simplify your giving. To learn more please contact Christine Dawson at 831.375.9712 or [legacy@cfmco.org](mailto:legacy@cfmco.org). We would be honored to assist you.

“

**THE FUND SERVES AS A  
'COMMUNITY CHEST,' GIVING THE  
CFMC THE FLEXIBILITY TO ADDRESS  
A BROAD RANGE OF CURRENT AND  
FUTURE NEEDS.**



## Caste Action Alliance Scholarship Fund

Two professional women with different perspectives, one Black and one white, found common ground to form a forward-thinking action group committed to rising up for social and restorative justice. Bry'Andi Brandon and Carie Broecker met during an online class on the Underground Railroad. They then discovered the book "Caste," by Isabel Wilkerson, which describes a long-held caste system that oppresses Black people in America, determines status and respect and who gets access to resources.

"We decided we needed to do something, a global effort, because everyone needs to be a part of this," said Brandon, a retired nurse and wellness facilitator. Together with Broecker, co-founder and executive director of Peace of Mind Dog Rescue, they formed the Caste Action Alliance to address the wide educational disparities experienced by Black youth in America. They created the Caste Action Scholarship Fund at the CFMC to award high school, college and vocational scholarships to people ages 18-30 of African American descent. "It's our hope that we can inspire others to join us." Learn more at [cfmco.org/CAAScholarship](https://cfmco.org/CAAScholarship).

## The Noorani Family Fund

The late Amjad Noorani chose to partner with the CFMC in his charitable gift planning. He donated a piece of commercial real estate to the CFMC, which sold the property, and created the Noorani Family Fund, a donor advised fund, with the proceeds. "We chose the CFMC over larger foundations in Silicon Valley or other national commercial charitable funds because we wanted to give back to programs in the Salinas-Monterey area, which was our home community for many years. We have tried to support local programs and institutions that do good work in the community," said Amjad.

The family made grants to local organizations including Community Human Services and Natividad Medical Foundation. Additional grants have gone to The Citizens Foundation in Pakistan, the Nooranis' country of origin, to support education of underprivileged children and education reforms, as well as to movements for gun control and minority education in the U.S. Of making grants through the fund, Amjad said, "We hope we have given more than we have received."

## The Martin and Nancy Dodd Fund

Behind every person in recovery is a family. Martin and Nancy Dodd married in 1952 and started their family. Martin's personal struggles with alcohol started him on a path to sober up the world, one man at a time. Sheryl Merrill, Martin and Nancy's daughter, told us, "My mother always said be careful what you pray for. She wanted him to get sober, but she had no idea what was going to happen next!"

In 1968, they turned a labor camp in Salinas into the first Sun Street Center, a recovery center for men on the streets. In the 70s, Nancy started an Al-Anon group and other programs for families, while also working on the idea of transitional housing to keep families in recovery together. In 1998, Sun Street, in collaboration with county agencies and nonprofits, established Pueblo Del Mar Family Recovery Community. A year after Nancy's death, her vision was realized in the creation of the Nancy Dodd Community Center at Pueblo del Mar. In 2005, the Dodd family created the Nancy Wheelis Dodd Fund at the CFMC in Nancy's honor to aid recipients on their road to independence. Renamed the Martin and Nancy Dodd Fund after Martin's passing in 2016, the fund continues the Dodds' legacy.



^ Scholarship Co-founders Bry'Andi Brandon and Carie Broecker



^ Grant recipient Community Human Services

✓ Pueblo del Mar residents and Sheryl Merrill (r)



# Our Family of Funds

The CFMC holds nearly 700 funds created by individuals, families and businesses. The CFMC is a steward of both the charitable resources entrusted to us and each donor's philanthropic vision.

## Affiliate Funds

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

Community Fund for Carmel Valley  
Northern Monterey County Foundation  
Southern Monterey County Foundation

## Agency Endowment Funds

*A permanent philanthropic resource for nonprofit agencies, these funds are invested for the long term, producing a steady stream of income each year.*

39 Craftsmen Fund for Monterey County  
Youth Museum  
All Saints' Day School  
All Saints' Day School Endowment Fund  
The Gloria S. Daly Endowment Fund for  
All Saints' Episcopal Day School  
Hester Hyde Griffin Fund for All Saints'  
Episcopal Day School  
Laurie Boone Hogen Appreciation Fund  
for Excellence in Elementary Education  
Bishop Kip Fund for All Saints' Episcopal  
Day School

Alliance on Aging Endowment Fund  
Alzheimer's Association of Monterey  
County  
David Allen Bernahl II, Local Heroes Fund  
for CASA

Big Sur Health Center Endowment Fund  
The Big Sur Land Trust Conservation Fund  
Blind and Visually Impaired Center Fund  
Boys & Girls Clubs of Monterey County  
Carl Cherry Center for the Arts Fund  
Carmel Music Society Endowment Fund  
Carmel Public Library Foundation Fund  
Carmel Public Library Foundation -  
Children's Fund

Carmel Woman's Club Fund  
Carmel Woman's Club Scholarship  
Endowment Fund  
Casa Amesti Foundation Building  
Endowment Fund

## Casa Amesti House and Garden Endowment\*

Center for Photographic Art Fund  
Chamber Music Monterey Bay Fund  
Chartwell School Scholarship Endowment  
Fund  
Children's Services International Fund  
Community Homeless Solutions  
Endowment Fund  
Community Partnership for Youth Fund  
Elkhorn Slough Foundation, Inc. Fund  
Fenton Founders' Fund for Youth Music  
Monterey  
Food Bank for Monterey County  
Endowment Fund  
Foundation for Monterey County Free  
Libraries - General Endowment Fund

Foundation for Monterey County Free Libraries -  
Dallas Shaffer Book Fund  
Friends of the Salvation Army Monterey  
Peninsula Fund  
Friends of the Carmel Valley Library Fund  
**Gateway Center of Monterey County\***  
Girl Scouts of California's Central Coast  
Endowment Fund  
Goodwill Industries of Santa Cruz, Monterey  
and San Luis Obispo Counties Fund  
Mayor Joe Gunter Memorial Fund for the  
Veterans Day Parade  
Health Projects Center Fund  
Interim, Inc. Mental Illness Endowment Fund  
Kinship Center Fund  
Legal Services for Seniors Endowment Fund  
LULAC Council # 2055 Fund  
Lyceum Founders' Fund in Memory of Vera  
Hering and Claire Kennedy  
**Max's Helping Paws Endowment Fund\***  
Meals on Wheels of Salinas, Inc. Fund  
Meals on Wheels of the Monterey Peninsula  
Fund  
Eve Mills Memorial Fund for Meals on Wheels  
Salinas Valley  
Monterey County Free Libraries - Staff  
Development Fund  
Monterey County Historical Society Fund  
Monterey History and Art Association  
Endowment Fund  
Monterey Museum of Art Fund  
Monterey Public Library Fund  
MPC Women Supporting Women Endowment  
Fund  
Museum Foundation of Pacific Grove Fund  
Natividad Medical Foundation Fund  
Danny Nugent Memorial Campership Fund  
Ombudsman for Long-Term Care Fund  
Jack O'Neill and Harry Hind Endowment Fund  
Operating Endowment Fund  
Orchestra in the Schools Endowment Fund  
Nellie Irons Orr Scholarship Fund  
Pacific Repertory Theatre Endowment  
Project Helping Hand Fund  
Rancho Cielo Endowment Fund  
Salinas Rodeo Rotary Club Foundation Agency  
Endowment Fund 2  
Sylvia W. Schwarz Endowment for Reading  
Improvement at Tularcitos School  
SPCA of Monterey County Fund

St. Timothy Foundation, Inc. Fund  
Sunset Theater Endowment Fund  
Robinson Jeffers Tor House Fund  
Tularcitos Parent Teacher Organization Fund  
Director Emeritus Richard Tyler Scholarship Award  
United Way of Monterey County Fund  
Valley of the Moon Legacy Endowment Fund  
Ventana Trails Forever Fund  
Ventana Wilderness Alliance Fund  
Ventana Wildlife Society Fund  
The Western Stage Endowment Fund  
York School Fund  
Youth in Wilderness Fund

## Agency Stewardship Funds

*Agencies benefit from participation in the CFMC's investment portfolios and maintain access to the fund's principal.*

1984 Fund

## AMJ Stewardship Fund\*

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

## Carmel Cares Fund\*

Carmel Heritage Society Stewardship Fund  
Carmel Valley Angel Project Stewardship Fund  
Carmel Valley Kiwanis Foundation Stewardship  
Fund  
Carmel Valley Manor Foundation Stewardship  
Fund  
Carmel Woman's Club Stewardship Fund  
CASA of Monterey County Stewardship Fund  
Central Coast VNA and Hospice, Inc.  
Stewardship Fund



^ (l to r) Teri Belli, Mel and Regina Mason, Dan Baldwin



^ Carmel Woman's Club presents scholarship check



**THE MASONS ARE A  
TRUE FORCE FOR GOOD.  
THEY ARE COMMITTED  
TO DOING WHAT IS RIGHT.**

– Teri Belli  
CFMC Board Chair



Visiting Nurses Association and Hospice  
 Stewardship Fund II  
 CCVNA Stewardship Fund III - Long Term  
 Restricted Investment Fund  
 Stewardship Fund for the Center for  
 Photographic Arts  
 Central Coast Center for Independent Living  
 Stewardship Fund  
 Central Coast Veterans Cemetery Foundation  
 Stewardship Fund  
 Chamber Music Monterey Bay Stewardship  
 Fund  
 CHISPA Stewardship Fund  
 Church in the Forest Fund for the Future  
 Community Homeless Solutions Stewardship  
 Fund  
 Community Human Services Stewardship Fund  
 Conservancy for the Range of the Condor  
 Stewardship Fund  
 Del Monte Forest Conservancy Fund  
 Early Childhood Equity Stewardship Fund  
**The Equine Healing Collaborative  
 Stewardship Fund\*\***  
**First Baptist Church of Salinas Stewardship  
 Fund\***  
 Friends of the Andy Ausonio Library  
 Stewardship Fund  
 Friends of Carmel Forest Stewardship Fund  
 Friends of the Carmel Valley Library  
 Stewardship Fund  
 Friends of the Marina Library Stewardship Fund  
**Friends of the Pacific Grove Public Library  
 Fund\*\***

**Friends of the Pacific Grove Public Library  
 Youth Services Fund\*\***  
**Gateway Center Mary Lou Cortright  
 Memorial Legacy Fund\***  
 Girls Inc. Stewardship Fund  
 Harmony at Home Ending Violence & Building  
 Families Stewardship Fund  
 Hartnell College Foundation Student Success  
 Fund  
**Health Projects Center Stewardship Fund\*\***  
 International School of Monterey Foundation  
 Stewardship Fund  
**IOC/Joining Hands Benefit Shop  
 Stewardship Fund\*\***  
 Jacob's Heart Children's Cancer Support  
 Services Stewardship Fund  
 Japanese American Citizens League of  
 Monterey Peninsula Stewardship Fund  
 Kernes Adaptive Aquatics Stewardship Fund  
 Kinship Center Stewardship Fund  
**Laguna Seca Raceway Foundation  
 Stewardship Fund\***  
 LandWatch Monterey County Stewardship  
 Fund  
 Sun Street Centers' Anne C. Leach Scholarship  
 Fund  
 Learning Opportunities Endowment Fund for  
 Scottish Fiddlers of California  
 Legal Services for Seniors Stewardship Fund  
 Meals on Wheels of the Salinas Valley  
 Stewardship Fund  
 Methodist Foundation of Pacific Grove  
 Stewardship Fund  
 Monterey County Pops Stewardship Fund  
 Monterey County Rape Crisis Center  
 Stewardship Fund  
**Monterey Sober Living for Women Home  
 Purchase Fund\***  
 Museum Foundation of Pacific Grove  
 Stewardship Fund  
 Pacific Grove Public Library Foundation Fund  
 Pacific Grove Public Library Fund for the Future  
 Park It! Stewardship Fund  
 Peace of Mind Dog Rescue Stewardship Fund  
 Rancho Cielo Youth Stewardship Fund  
 Maury Richmond Scholarship Stewardship Fund  
 Sarah Spencer Seed Money Fund for the  
 Center for Photographic Art  
 Sun Street Centers Stewardship Fund  
 Friends of Sunset Foundation Stewardship Fund  
 Salinas Valley Memorial Hospital Foundation  
 Stewardship Fund

Temple Beth El Stewardship Fund  
 United Way Monterey County Stewardship  
 Fund  
 United Way Monterey County Stewardship  
 Fund II  
 United Way Monterey County Stewardship  
 Fund III  
 Central Coast Young Men's Christian Association  
 Stewardship Fund  
 Youth Music Monterey Stewardship Fund  
**Company Funds**  
*Businesses simplify their giving and receive tax  
 advantages and customized support to maximize  
 their community philanthropy.*  
 Belli Architectural Group Scholarship Fund  
 The Carmel Realty Foundation  
 Church Brothers-True Leaf Farms Scholarship  
 Fund  
 The Club at Pasadera Employee Emergency  
 Assistance/Relief Fund  
 The Club at Pasadera Scholarship Fund  
 Corral de Tierra Country Club Employee  
 Emergency Assistance/Relief Fund  
 Mission Ranches Fund  
 Monterey Pacific Company Fund  
 Nepenthe/Phoenix Corporation Fund  
 Sea Haven Fund  
 Sharon Heights Golf and Country Club  
 Employee Scholarship Fund  
 Taylor Farms Scholarship Fund

**Designated Funds**  
*Donors can support a designated agency or agencies  
 over time with a permanent, protected stream of  
 operating income.*  
 Pauline and John Anderson Fund  
 William S. and Janice R. Anderson Fund  
 Animal Legal Defense Fund  
 Arts Council for Monterey County Endowment  
 Fund  
 Tony P. and Marjorie Ayres Fund  
 Nancy Parker Benham Endowment Fund  
 Central Coast Lighthouse Keepers Fund  
**Joseph and Betty Chaffers Fund\***  
 Cislini Fund  
 Howard and Lynn Classen Endowment  
 Communities for Sustainable Monterey County  
 Teacher Pathway Fund: CSUMB  
 Charles Auguste de Guigné Charitable  
 Foundation  
 Frances Elgan & Werner Kunkel Fund  
 Howard W. and Elva M. Elliott Trust Fund  
**Equal Access Monterey Bay Fund\***  
 The Herman Fletcher Fund  
 A Fork in the Road-A Fund Providing a Path to a  
 Science Career  
 John Gill ALS Patient Support Fund  
 Rodney & Betty Guilfoil Fund  
 The Edgar H. Haber and Terry Jones Haber Fund  
 Jack and Donna Hardy Fund  
 Teacher Pathway Fund: Hartnell College  
 The Hudson Fund  
 Ward D. and Mary T. Ingram Fund  
 Bob Jones Boy Scout Camping Fund  
 The William Kiepora Fund  
 Jack and Patricia Kilmartin Fund  
**Esther H. Lindsey Youth Fund\*\***  
 Sandy Loiacono Scholarship Fund  
 John H. Marble Endowment Fund  
 MBD Fund



^ Michael Castro and  
 Laurel Lee-Alexander at the SIEDI convening  
 v Taylor Farms Scholarship Recipients



^ caption here



Jane P. McKay Endowment Fund for the Big Sur Land Trust Fellowship Program  
Jane P. McKay Endowment Fund for Door to Hope  
Jane P. McKay Endowment Fund for the Hartnell College Foundation Counselors' Grants Program

**Perry D. and Barbara R. Miller Charitable Fund\***

Montage Health Support Fund at the Community Foundation for Monterey County  
Monterey County Symphony Association Fund  
Joyce Morris Fund

Margaret L. Musser Restricted Fund

**Susan A. Nerney Budding Performer Fund\***

F. Robert Nunes Family Fund  
Perry-Downer House Fund

**St. James Buildings Renovation Fund\***

Anne Thorp Memorial Fund  
Dr. James Valentine Fund  
Maud Porter Work Rose Garden Fund  
Carl Young Memorial Earth Science Endowment Fund  
YWCA Endowment Fund

**Donor Advised Funds**

*Donors recommend grants from their fund to support nonprofit organizations and benefit from CFMC staff expertise and support to enhance their philanthropy.*

22 Love Fund

Zekai and Carolyn Akcan Fund

Amy Anderson and George Somero Fund

Anonymous Donor Temporary Fund

Antle Family Fund

Rick and Tonya Antle Fund

**Armstrong Family Fund\***

Joey & Dewitt Astin Memorial Fund

Ausonio Family Fund

Dan Baldwin and Anne Ylvisaker Fund

Bareuther Family Foundation

Peggy Downes Baskin Fund for Women's Reentry

Lino and Teri Belli Family Fund

The Benjamin Family Foundation

Marta L. Bennett Fund

Mads and Susan Bjerre Charitable Fund

Sarah and Robert Bouchier Fund

Howard Franklin Bowker Numismatic Projects Endowment Fund

Bright Futures Fund

The Brown Family Fund

Buccafurni-Lawrence Fund

Buchalter/Adler Family Fund

The Buffett Fund

Josephine Bunn Fund

**Dale and Margaret Byrne Family Fund\***

California Rodeo Salinas Fund

Carmel Gives Fund

Chappellet Youth, Arts, and Ecology Fund

Chris's Fund

Colleagues of the Arts Endowment Fund

**Collins Family Fund\***

**Julie Conrad Donor Advised Fund\***

Cormorant Fund

Scott Corwon Fund

**John and Nessie M. Cuda Family Fund\***

Cynthia Snorf Fund

Andrew & Phyllis D'Arrigo Fund

D'Arrigo-Martin Fund

Stephen V. Davies Family Fund

Ila Davis Fund

Donald McEnry Davis Charitable Fund

Eric and Ila Davis Fund

Dekker Davidson Foundation

**DeLay-Magnuson Foundation Fund\***

Marcia F. DeVoe Fund

Dewey Foundation Fund

DeWitt Fund

Marti and Steve Diamond Charitable Foundation Fund

Martin and Nancy Dodd Fund

Helen R. Doe Fund

Dooling Family Fund

Doolittle Fund

Jean and Jim Duff Fund

**Engstrom and West Fund\***

Davis Factor, Jr. and Christine B. Factor Fund

Davis Factor, Jr. Fund #2

Farrell/Allen Carmel Rotary Fund

Farrell/Allen/LaSalle Carmel Rotary Fund

Doris Parker Fee Fund

Doris Parker Fee Fund #2

Love Our Central Coast Feed the Homeless Fund

Ted Fehring Family/Carmel Host Lions Club Fund

Ted Fehring Family/Carmel Host Lions Club Fund #2

Jose F. Fernandez Fund

Monterey Firemen's Charitable Association Fund

Anne R. Fitzpatrick Foundation Fund

Lori and Lou Flagg Memorial Youth Fund

Frances Memorial Fund

Renee Franken Giving Fund

Franklin Legacy Fund

Friends of Community Animal Services Fund

Friends of Sunset Donor Advised Fund

Fuhs Family Foundation Fund

Fund for the Salinas Valley

Fuqua Family Foundation Fund

**John and Laura Gamble Family Fund\***

The Joel and Dena Gambord Fund

**Gaver Family Fund\***

Gerosin Fund

Jim and Barb Gianelli Fund

**Tracy Gibbons Charitable Fund\***

**Bradley K. Gjerding Fund\***

Global Student Leadership Fund

Gloria Fund

Jessica Govea-Thorbourne Memorial Fund

Tom Grainger Memorial Fund

Harlan and Barbara Hall Fund

Richard Hamilton and Debra Schadeck Charitable Fund

The Peter and Jackie Henning Fund

**Herman-Mellon Family Fund\***

Joseph and Elizabeth Heston Family Foundation

Hicks Fund for the Arts

Carol and Don Hilburn Fund

The Ann Mayer Hiller Memorial Fund

Elmer G. and William G. Hitchcock Fund

Mary and Peter Hobley Memorial Fund

Hodges Family Fund

Jeanne Smith-Holmquist Fund

Chip Hooper Foundation

Tom Hopkins Wilderness Fund

David G. Huey and Carla S. Hudson Family Fund

Hughes-Rivera Family Fund

Huth Family Fund

Ann and Brian Jacobson Charitable Fund

Janzen Family Fund

**Jett Fighter Fund\***

Birt and Kathleen Johnson, Jr. Fund

**Victor and Lynda Johnson Fund\***

Colburn and Alana Jones Foundation

Karen Judkins and Steven Wade Fund

Leslie B. Kadis, MD & Ruth McClendon Foundation Fund

Kadushin Robinson Fund

F.B. and B.H. Keith Fund

Carol and Chuck Keller Family Fund

Karen M. and Brendan P. Kelly Fund

**Robert & Angela Kent Fund\***

Steven D. Kesseling and Jean M. Forrest Fund

Frank and Michelle Knight Family Fund

Kobrinisky Evans Family Fund

The Kohn Family Theatre and Arts Fund

Phyllis Geer Krystal Fund

Barbara Paul and Tom LaFaille Fund

The Landreth Family Fund

James and Susan Lansbury Fund

Jefferson and Frances Larkey Memorial Fund

Lee-Alexander Family Fund

Lehman Family Fund

William R. and Duncan B. Lewis Family Foundation Fund

Phyllis and Herbert Lister Fund

Live and Give Fund

Valera Whitford Lyles Fund

MacGowan Pathwanderer Fund

John and Kristina Magill Fund

Mahoney/Peterson Family Fund

The Marcus Family Fund

The Marcus Family Fund #2

Cambrel B. Marshall Fund

Cappy Martin/Vernon Hurd Monterey Rotary Club Fund

McHenry Family Fund

Kim and Steve McIntyre Fund

McMahan Family Fund

Catherine L. and Robert O. McMahan Fund

Marjorie McNeely Fund for the Blind or Illiterate

Richard and Grace Merrill Fund

Lenore and Dale Meyer Fund

Lenore and Dale Meyer Fund 2

Malcolm and Joanne Millard Fund

**Perry and Barbara Miller Family Foundation Fund\*\***

Clint and Karen Miller Charitable Fund

Mills Family Fund



**WE HOPE WE HAVE  
GIVEN MORE  
THAN WE HAVE RECEIVED.**

– Amjad Noorani  
Noorani Family Fund

Tim and Cindy Minor Charitable Giving Fund  
 William and Patricia Monahan Fund  
 Monterey Peninsula Sunrise Rotary Club Fund  
 Barbara D. Moore Charitable Giving Fund  
 Lawrence and Carleton Mowell Fund  
 Anthony and Lary Lynn Muller Fund  
 Joan Ann Nattress - Movement, Exercise,  
 Longevity Fund  
 Martin Needler and Jan Black Fund  
 Neidel Family Fund  
 Gilbert M. Neill Math Fund  
 Neumeier Taylor Foundation Fund  
 Nonella Family Fund  
 Noorani Family Fund  
 Don Nucci Fund for the Salinas Valley  
 Oak Hill Charitable Fund  
**O'Brien Family Fund\***  
 Mike and Mary Orradre Fund  
 Overett Family Fund  
 Packer Family Foundation  
 Pagnillo Family Fund  
**Painter Family Fund\***  
 Nicholas M. Pasculli Fund  
 Bill and Rita Patterson Foundation Fund  
 Pfeiffer Ridge Fund  
 Reed Family Fund  
 Reese Family Fund  
**Michael E. Reid and William E. Robnett  
 Family Fund\***  
 John and Annette Romans Family Fund  
**Lee and Shirley Rosen Fund\***  
 Rotary Club of Monterey, Cannery Row Fund  
 The Fred Rowden Memorial Fund  
 RSH Fund  
**Ryan Family Fund\***  
 Salinas Rodeo Rotary Club Fund  
 Salinas Rotary Club Fund  
 The James M. Shade Memorial Fund  
 Shelley Family Fund  
 Ramsey Shirk Fund  
 Richard and Cindy Zoller Silver Family Legacy  
 Fund  
 Matthew Simis and Michael Gray Fund  
 Laura Sinks Fund  
 Smith Family Alliance Fund  
 Andy and Steffanie Smith Fund  
 Dr. Catherine L. Smith Charitable Fund  
**Steve and Gail Snodgrass Charitable Fund\***  
 The Snorf Fund  
 Steck Family Fund  
 Salinas Steinbeck Rotary Club Fund  
 Struve Family Fund

James W. Sullivan and Catherine Brennan  
 Family Fund  
 Robert and Leslie Taylor Fund  
 Gary and Emma Taylor Fund  
**Terman and Borreson Family Fund\***  
 The Fred Terman and Nan Borreson Fund  
 Thau Family Fund  
 Peter and Anne Thorp Fund  
 Trinidad and Lupe Gomez Family Fund  
 Jim and Linda Tunney Fund  
 Tyler Visiting Fellowship in Residence Fund  
 William H. and Susanne S. Tyler Pathway Fund  
 Vallentin Fund  
 Vanderbilt Charitable Fund  
**Joe Rock and Robin Venuti Family Fund\***  
**Gabrielle Andrea Walters Fund\***  
 The Jackie and Mark Wendland Fund  
 Maija, Eva and Cody West Family Fund  
 Ben and Mary Ann Whitten Fund  
 Wiegand Family Foundation  
 Willemssen Family Fund  
 Bill and Kathi Wojtkowski Fund  
 Wold Family Foundation  
 Martin R. Wolf Family Fund  
 Yoga For All Movement Fund  
 Zalan Family Fund  
 Marsha McMahan Zelus Fund  
 Zeve Fund  
**Field of Interest Funds**  
*Donors specify a charitable area of interest and the  
 CFMC awards grants to local nonprofit organizations.*  
 Ruth L. and Wilbur K. Amonette Fund  
 The Todd Lueders Fund for the Arts  
**Nancy Jane Bletzer Fund for Animal Welfare\***  
 Paul Block, Jr. Fund  
 Patricia J. Boles Fund  
 Maureen Bradford Fund  
 Stephen and Madeleine Conran Fund  
 The John & Mary Dawson Learning Fund  
 Thomas Doud, Sr. and Anita M. Doud Fund I  
 Ken and Gundy DuVall Fund  
 Fund for the Environment  
 Fred Farr Environmental Stewardship Fund  
 Cyrus F. Fitton Fund  
 Jean P. Fitton Fund  
 Rudy E. Futer Fund for Human & Humane Needs  
 Good Neighbor Basic Human Needs Fund  
 Gumm Fund for the Performing Arts  
 Elmer Mills Harris Fund  
 Terry Layne Fund for Beach Protection  
 Douglas Madsen Fund for HIV/AIDS Housing in  
 Monterey County  
 Kathleen and Howard Marks Fund  
 The McKay Fund  
 Monterey County Tolerance and Acceptance  
 Fund  
 MPUSD Fund for the Arts  
 Leslie Mulford Fund  
 Engracia Irene Murray Field of Interest Fund  
 Margaret L. Musser Field of Interest Fund  
 Andrew D. and Marjorie S. Orrick Fund  
 Out Reach - A Fund for LGBTQ+ Life in  
 Monterey County  
 June P. Sheppard Fund for the Performing Arts  
 Siembra Latinos Fund - Endowed  
 Frank Pye Smith M.D. Medical Facilities Fund  
 Robert and Virginia Stanton Endowment Fund  
 Irving R. and Helen G. Stuart Fund  
 The James M. and Marjorie E. Sturgeon Fund  
 Shirley I. Thackara Fund

The Fund for Homeless Women Non-Endowed  
 Fund  
 The Fund for Homeless Women  
 Evelyn and Spencer Thompson Fund to Help  
 Feed the Hungry  
 Dr. George and Sam-Kih Thorngate Family Fund  
 Tri-Counties Blood Bank Fund  
 Anita Tarr Turk Fund for Breast Cancer Research  
 Women's Fund Endowment  
 Youth Fund  
 Florence Haspel Zeve Award Fund  
 Fund for the 21st Century  
**Fund for Monterey County**  
*This collection of funds provides field of interest and  
 unrestricted philanthropic resources for community  
 grantmaking.*  
 Kathleen and Austin Barrows Fund  
 Wendy (Millard) Benjamin Fund  
**Nancy Jane Bletzer Fund\***  
 CFMC Trustees Fund  
 Cislini Fund  
 Leland Edmund Dake and Gloria Urban Dake  
 Fund  
 Mary Jane Drummond Fund  
 Lewis and Gloria Fenton Fund  
 The Fund for Monterey County  
 General Endowment-NGP Grants  
 Marilyn & Philo Holland Fund  
 Lauralie and J. Irvine Fund  
 George P. and Betty Kendall Memorial Fund  
 Leo Lanini Fund  
 The Barbara and Joseph Lee Fund  
**Esther H. Lindsey Fund\*\***  
 The John and Nancy Love Fund  
 Jan and Tannie Mandel Fund  
 John R. Marron Fund  
 General Endowment - Opportunity Fund  
 Paul Edward and Gay Delores Rochester Fund  
 The Donna Roop Endowment Fund  
 The Scott Fund  
 Renita K. Seibel Fund  
 Clyn & Pamela Smith Fund  
 Evelyn Torras Fund  
**Private Foundation Funds**  
*These funds offer a customized blend of  
 administrative support plus tax advantages,  
 increased flexibility and personalized philanthropic  
 services.*  
 College Futures Foundation Fund  
 The James Irvine Foundation Micro-Loan Fund  
**James Irvine Foundation Salinas Inclusive  
 Economic Development Initiative\***  
 The James Irvine Foundation Salinas Leadership  
 Fund  
 The Morse Foundation Scholarship Fund  
 The Morse Foundation Stewardship Fund  
 The David and Lucile Packard Foundation Fund  
 S.T.A.R. Foundation of Monterey County  
 Stewardship Fund  
 Robert and Florence Slinger Fund  
 The Alexander F. Victor Foundation  
**The Weidner Foundation Fund\***  
**Scholarship & Award Funds**  
*Donors invest in the future of local students.*  
 Monica Abbott Scholarship Fund  
 AGB Scholarship Fund  
 American Culinary Federation Monterey Bay  
 Chapter, Marc H. Vedrines Scholarship Fund  
**Shahin Hormozi Anable Scholarship Fund  
 for Women in Math & Science\***



^ (l to r) Rick and Martha Kennifer,  
 Pam and Giff Lehman at the  
 Celebration of Philanthropy

**Ausonio Family Scholarship Fund\*\***

Dr. William D. Barr Scholarship Fund for Excellence in Educational Leadership  
 Dr. Roger and Kate Bartels Memorial Scholarship Fund  
 The Bissell Fund  
 James Bliss & Annette Sward Forestry & Nursing Scholarship Fund  
 Margaret and Seba Bronson Scholarship Fund  
 Carol C. W. Butterfield Bacon Scholarship Fund

**California Rodeo Salinas Scholarship Fund\***

The Larry Horan-Jim Langley Cal Alumni Memorial Scholarship Fund  
 California Polytechnic State University Agriculture Business Department Endowment Fund  
 Carmel High School Class of 1952 Fund  
 Carmel Valley Women's Club Foundation Scholarship Fund  
 CASA of Monterey County Scholarship Fund

**Caste Action Alliance Scholarship Fund\***

CHISPA Scholarship Fund  
 Bill Clapper Memorial Music Scholarship Fund  
 College Futures Monterey County Fund  
 Raymond H. Costa Family Scholarship Fund

**Bert P. Cutino Professional Chef Scholarship Fund\*\***

Drezner Family Scholarship Fund  
 The Elkhorn Slough Foundation's James Rote & Les Strnad Scholarship Fund  
 David L. Ferguson Scholarship Fund  
 Matthew Paul Finnigan Memorial Scholarship Fund

**Flagg Scholarship Holding Fund Nancy Fowler Memorial Music Scholarship Fund\***

**FW Family Scholarship Fund\***  
 Gabilan Hope Scholarship Fund  
 Joel and Dena Gambord Nursing Scholarship  
 Girls' Health in Girls' Hands Scholarship Fund

**Richard Gourley Memorial Scholarship Fund\***

The Allen S. Griffin Fund  
 Geraldyn R. Griffith Memorial Scholarship Fund  
 Whitney Elisabeth Grummon Memorial Scholarship Fund  
 R. J. Harper Memorial Scholarship Fund  
 Jess Harrison Family Scholarship Fund  
 Hausdorf Family Scholarship Fund  
 Henry Hibino Memorial Scholarship Fund  
 Scholarship Fund for Homeless Women  
 Bonnie Hutcheon Scholarship Fund  
 Ipsen-Tully Cal Memorial Scholarship Fund  
 Elke Junger Making a Difference Fund  
 Kier Memorial Scholarship Fund  
 George V. Kriste Scholarship Fund

**Howard and Gretchen Leach Scholarship Fund #liveforross: A Fund for Safety Awareness and Vocational Education\*\***

Rotary Club of Monterey Martin/Hurd Scholarship Fund  
 Men's Golf Association (MGA) at Quail Lodge Scholarship Fund  
 John S. Myszak Scholarship for Future Teachers  
 Robert Hattori Nakamura Memorial Scholarship Fund  
 Anthony Nicholas Narigi Memorial Baseball Scholarship Fund  
 Libby Olver Scholarship Fund  
 Dr. Gladys M. Olvis Scholarship Fund  
 Kristopher Pallastrini Fund  
 Richard Scott Reynolds Science and Technology Education Scholarship Fund  
 San Ardo Foundation for Education  
 Theodore R. Sarbin Research and Scholarship Award Fund  
 The Harles R. Sarment College Endowment  
 Steven Paul Schmidt Scholarship Fund  
 Alan and Rita Shugart Scholarship Fund  
 Smith Family Scholarship Fund  
 Robert Stanton Award Fund  
 Wilbur H. and Maxine D. Stevens Scholarship Fund

**Traven Tapson Foundation\*\***

The Nan Borreson and Fred Terman Scholarship Fund  
 Hugo and Dolores Tottino Family Scholarship Fund  
 Emerging Leaders Society of United Way Monterey County Scholarship Fund  
 Jack Van Zander Cal Alumni Memorial Scholarship Fund  
 Vista Verde Labor Scholarship Fund  
 Charles Joseph Watts Scholarship Fund  
 Shelley Ann Watts Scholarship Fund

**Daphne and Stuart Wells Public Service Scholarship Fund\*\***

Horace H. Wilson Scholarship Fund  
 World Affairs Council of the Monterey Bay Area Scholarship Fund

**Zalan Family Scholarship Fund\*****Special Purpose Funds**

*These funds are established for specific projects, initiatives or urgent needs.*

Big Sur Disaster Relief Fund  
 COVID-19 Relief Fund  
 COVID-19 Public Health Institute

**Natural Disaster Support Scholarship Fund\*\***

Monterey County Fire Relief Fund  
 Soberanes Fire Fund  
 Alert Monterey County Fund  
 Weston Call Fund for Big Sur  
 Old Capital Club Garden and House Operating Fund

Casa de Noche Buena Special Purpose Fund  
 Census 2020 - VCCF & State of CA  
 Census 2020 Fund - Pooled Fund

**Center for Nonprofit Excellence #7\*****COVID-19 Collaborative Community Health Workers\*****COVID-19 Collaborative - Packard Funding\***

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

**Gonzales Community Center Capital Campaign\*****Community Health Literacy Program\***

Fund for Homeless Women Administrative Fund  
 Monterey County Gives!

Monterey Peninsula Small Business Relief Fund  
 Pathways to Safety  
 Rudy Futer Pony Trust

**San Diego Foundation Expanded Learning Program Grant\*\***

**\*New Fund created in 2021**

**\*\* New Fund created as of May 31, 2022**



^ Hope, Horses & Kids



^ CFMC Staff greet guests at the Celebration of Philanthropy



# 2021 Financials

## COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2021

### Additions

Contributions*	34,880,610
Other income	613,046

### Total revenues and support **35,493,656**

Investment gain	35,044,500
-----------------	------------

### Grants and expenses

Grants*	34,792,196
Other operating expenses	4,464,851

### Total grants and expenses **39,257,047**

Increase in net assets	31,281,109
------------------------	------------

### Net assets

Beginning of year	271,929,112
-------------------	-------------

### End of Year **303,210,221**

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

## CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2021

### Assets

Cash and equivalents	\$21,182,285
Contributions receivable	444,672
Other assets	10,324
Property and equipment, net	1,839,300
Investments, carried at market value: Mutual funds and equities	325,599,852
Cash and money market funds	8,886,106
Charitable gift annuities	4,590,276
Beneficial interest in remainder trusts administered by other trustees	
889,929 Investments held in charitable remainder trusts	978,035

### Total assets **385,630,163**

### Liabilities and net assets

Grants payable	2,038,614
Accounts payable and accrued expenses	214,508
Liabilities under split-interest agreements and charitable remainder trusts	15,345,401
Funds held for others	64,821,419

### Total liabilities **82,419,942**

### Total net assets **\$303,210,221**

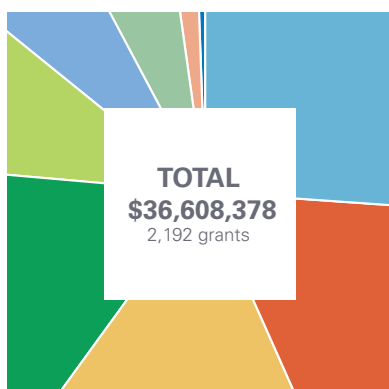
*The condensed financial information was prepared based upon audited financial statements prepared by Hutchinson and Bloodgood, LLP.*

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



# Grant Details - \$36 Million Granted

## Grants by Program Area

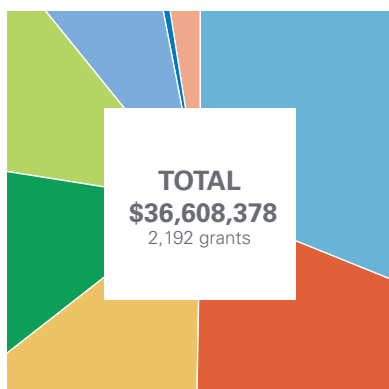


Human Services	513
Education	685
Health	232
Public/Community Benefit	190
Arts and Culture	260
Environment	172
Animal Welfare	62
Religion Related	60
International & Foreign Affairs	18

Human Services	\$9,640,978
Education	6,297,881
Health	6,055,452
Public/Community Benefit	5,985,141
Arts and Culture	3,503,961
Environment	2,344,596
Animal Welfare	2,034,543
Religion related	634,679
International & Foreign Affairs	111,149

**TOTAL** **\$36,608,378**

## Grants by Region

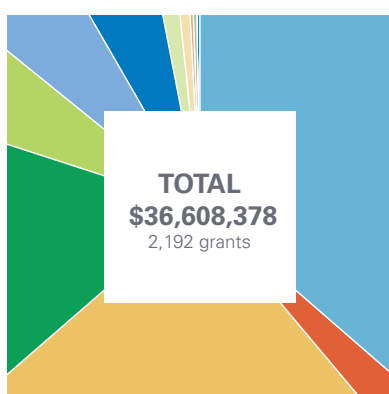


Countywide	595
Monterey Peninsula	506
Salinas/Salinas Valley	252
Outside Monterey County	667
Multiple Areas	45
Big Sur	39
South of King City	29
Castroville and North County	59

Countywide	\$11,124,499
Monterey Peninsula	6,812,397
Salinas/Salinas Valley	4,968,195
Outside Monterey County	4,660,311
Multiple Areas	4,146,273
Big Sur Area	2,807,853
South of King City	1,207,269
Castroville and North County	881,581

**TOTAL** **\$36,608,378**

## Grants by Type



Donor Advised	Scholarships & Awards
MC Gives Campaign	Field of Interest
Special Project	Pass Thru/Temporary
Restricted Fund	Affiliate Fund
Community Impact	Organizational Development
Discretionary	Opportunity
	Neighborhood Grants

Donor Advised	\$10,817,300
MC Gives Campaign	7,670,926
Special Project	7,382,156
Restricted Fund	4,835,931
Community Impact	1,769,542
Discretionary	1,688,575
Scholarships & Awards	1,548,487
Field of Interest	475,414
Pass Thru/Temporary	172,825
Affiliate Fund	161,542
Organizational Development	50,180
Opportunity	30,000
Neighborhood Grants	5,500

**TOTAL** **\$36,608,378**

# Board



## 2022 Board of Directors

### Teri Belli (Chair)

Belli Architectural Group

### Kirk Gafill (Vice Chair)

President/CFO

Nepenthe/Phoenix Corporation

### Jan Vanderbilt (Treasurer)

CPA/President

Vanderbilt Certified Public Accountants

### Loren Steck (Secretary)

Entertainment Industry Consultant

### Romero Jalomo

Vice President of Student Affairs  
Hartnell Community College

### Elsa Mendoza Jimenez

Director of Health Services  
Monterey County Health Department

### Nolan Kennedy

Attorney at Law  
Kennedy, Archer & Giffen

### Judy Guzman Krueger

President  
Tulipán LLC

### Giff Lehman

Founder  
Integrus Wealth Management  
(Retired)

### Jesse Lopez

Managing Partner of Bianchi,  
Kasavan & Pope, LLP

### Adriana Melgoza

Director of Organizing and  
Education  
Center for Community Advocacy

### René Mendez

City Manager  
City of Gonzales

### Fred Meurer

Owner  
Meurer Municipal Consulting

### Larry Oda

Community Volunteer  
Former JACL National President

### Betsy Pearson

Nonprofit Consultant  
United Way (Retired)

### Joe Pezzini

Senior Director of Agricultural  
Operations  
Taylor Farms

### Francine Rodd

Executive Director  
First 5 Monterey County

### Abby Taylor-Silva

Executive Vice President  
California Agricultural Leadership  
Foundation

### Jennifer L. Walker

Attorney/Shareholder  
Leach & Walker

### Tyller Williamson

Monterey City Councilmember

*We thank those board members,  
whose terms ended in 2021, for  
their years of dedicated service.*

**Betsy Buchalter Adler**

**Birt Johnson, Jr.**

**Bill Sharpe**

**Maija West**



# Staff



## CFMC Staff

### Jane Albertson

Communications Officer

### Jessica Alcantar-Tinajero

Grants and Office Coordinator

### Dan Baldwin

President/CEO

### Chalet Booker

Administrative Specialist

### Michael Castro

Community Initiatives Manager

### Clarisa Chisum

Administrative Coordinator

### Christine Dawson

Senior Vice President,  
Philanthropic Services

### Kim Drabner

Vice President of Finance and  
Human Resources

### Sarah Elias

Accounting Associate

### Daniel Faith

Director of Finance

### Esther Figueroa

Scholarships and Community  
Impact Officer

### Karina Gutierrez-Barboza

Grants and Data Specialist

### Maria Hauman

Director of Operations

### Joel Hernandez Laguna

Community Impact Officer

### Amanda Holder

Director of Communications

### Laurel Lee-Alexander

Vice President of Community  
Impact

### Jasmine Menor

Philanthropic Services Coordinator

### Reid Norris

Center for Nonprofit Excellence  
Leadership Development Specialist

### Susie Polnaszek

Director of Center for Nonprofit  
Excellence

### Andrea Scott

Director of Gift Planning

### Janet Shing

Director of Grantmaking

### Alisa Smith

Philanthropic Services Officer

### Brian Thayer

Senior Philanthropic Services  
Officer

### Gianna Yim

Accountant

### Retired in 2021:

**Julie Conrad, Diane Nonella**

*Thank you for your dedication to  
the CFMC!*

^ (l to r) seated: Kim Drabner, Laurel Lee-Alexander, Christine Dawson, Maria Hauman, Janet Shing; standing: Dan Baldwin, Esther Figueroa, Susie Polnaszek, Jasmine Menor, Sarah Elias, Andrea Scott, Jessica Alcantar-Tinajero, Clarisa Chisum, Gianna Yim, Karina Gutierrez-Barboza, Amanda Holder; back row: Reid Norris, Jane Albertson, Joel Hernandez Laguna, Alisa Smith, Chalet Booker, Daniel Faith, Brian Thayer, Michael Castro

# Gratitude

## 2021 Board Committees

### Executive Committee

Teri Belli (Chair), Betsy Buchalter Adler (Vice Chair), Kirk Gafill (Secretary), Jan Vanderbilt (Treasurer), Birt Johnson, Jr., Nolan Kennedy, Giff Lehman, Betsey Pearson, Maija West

### Audit

Loren Steck (Chair), Teri Belli, Elsa Mendoza Jimenez, Judy Guzman Krueger, Jan Vanderbilt

### Community Impact

Betsy Buchalter Adler (Chair), Teri Belli, Romero Jalomo, Judy Guzman Krueger, Adriana Melgoza, Francine Rodd

### Community Impact Investment

Nolan Kennedy (Chair), Rich Aiello, Teri Belli, Kirk Gafill, Giff Lehman, Fred Meurer, Loren Steck, Bill Tebbe

### Diversity Equity Inclusion Work Group

Teri Belli, Betsy Buchalter Adler, Romero Jalomo, Birt Johnson, Jr., Adriana Melgoza, Joe Pezzini, Francine Rodd, Abby Taylor-Silva (Staff), Cristina Dirksen, Kim Drabner, Sarah Elias, Laurel Lee-Alexander, Mackenzie Little, Susie Polnaszek, Andrea Scott

### Endowment Stewardship

Betsey Pearson (Chair), Betsy Buchalter Adler, Teri Belli, Greg Chilton, Elsa Mendoza Jimenez, Bill Sharpe

### Finance

Jan Vanderbilt (Chair), Teri Belli, Kirk Gafill, Birt Johnson, Jr., Fred Meurer, Joe Pezzini, Abby Taylor-Silva, David Warner

### Governance

Birt Johnson, Jr. (Chair), Teri Belli, Judy Guzman Krueger, Elsa Mendoza Jimenez, Fred Meurer, Maija West

### Investment

Giff Lehman (Chair), Teri Belli, David Benjamin, Steve Dart, Bill Doolittle, Birt Johnson, Jr., Craig Johnson, Nolan Kennedy, Steve McGowan, Ken Petersen, Bill Sharpe, Loren Steck, Jan Vanderbilt

### Philanthropic Resources

Betsey Pearson (Chair), Teri Belli, Birt Johnson, Jr., Judy Guzman Krueger, Erica Padilla-Chavez, Hanson Reed, Francine Rodd, Abby Taylor-Silva, Maija West

## 2021 Advisory Committees

### Community Impact

Betsy Buchalter Adler (Chair), Francine Rodd (Chair), Kathie Cain, Meg Clovis, Oscar Flores, Laura Gamble, Sandy Hale, Romero Jalomo, Ida Lopez Chan, Judy MacClelland, Adriana Melgoza, Betsey Pearson, John Scourkes, Bill Sharpe, Loren Steck, Lorraine Yglesias-Rice

### Community Fund for Carmel Valley

Alan Crockett (Chair), John Aliotti, Tess Arthur, Anthony Belleci, Michelle Bevard, Nick Craft, Joseph Hertlein, Jessica Kent, Alondra Klemek, Peter Meckel, Michelle Slade, Judith Sulsona

### Northern Monterey County Foundation Advisory Board

Chuck Allen (Chair), Glen Alameda, Nancy Ausonio, Lance Batistich, Ricky Cabrera, Don Chapin, Anne Herendeen, Karen Miller, Manuel Osorio, John Phillips, Abby Taylor-Silva

### Scholarships

Betsy Buchalter Adler, Javier Andrade, Celia Barberena, Linae Ishii Devine, Susan Galvin, Daniel Gonzalez, Krista Hanni, Bibiana Hernandez-Alcala, Peter H. Hiller, Berniz House, Felicia Perez Kausin, Di Lam, Julianne Leavy, Angeleke Levy, Rudy Medina, Teresa Nieves, Nettie Porter, Monica Rico

### Southern Monterey County Foundation Advisory Board

Jamie Jones (Chair), Oscar Avalos, Linda Benway, Grace Borzini, Ryan Casey, Robert Cullen, Michel Hardoy, Erin King, Mikel Ann Miller, Brett Saunders, Tom Shepherd, Abby Taylor-Silva, Teri Umbarger

### Siembra Latinos Fund Advisory Board

Ida López Chan (Chair), Chris Barrera, Patricia K. Cruz, Daniel Rodríguez, Elsa Mendoza Jimenez, Lorraine Yglesias-Rice, Blanca E. Zarazua, Esq., Lluvia del Rio

### Weston Call Fund for Big Sur

Brian Call (Chair), Galen Call, Sharen Carey, David Fink, Kirk Gafill, Matt Glazer, Jennifer Haydu, Butch Kronlund, Frank Pinney

### Robert and Virginia Stanton Endowment Committee

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

### Women's Leadership Advisory Council

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

## In Memoriam



**Mary Clapper**  
Legacy Society  
Member  
Scholarship Fund  
Holder



**Susie Franklin**  
Fund Holder  
Legacy Society  
Member



**Perry Miller**  
Legacy Society  
Member



**Dr. John Phillips**  
Legacy Society  
Member



**Robert Danziger**  
Legacy Society  
Member



**Dr. Allen Fuhs**  
Fund Holder



**Basil Mills**  
Former CFMC  
Board Chair  
Fund Holder



**Joseph Rock**  
Legacy Society  
Member



**Alfred Diaz-Infante**  
Former CFMC  
Board Member



**Barbara Miller**  
Legacy Society  
Member



**Gladys Olvis**  
Scholarship  
Fund Holder

Not pictured:  
**Richard Harris**  
**Esther Lindsey**  
**Dr. William McAfee**  
**John Neidel**

# Connect With Us

## PARTNER WITH US

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

## START A FUND - It's simple:

### 1 CREATE

Our team works with you to create a fund that reflects your charitable vision. Establish a fund in your name, your family's or your company's name or in honor of a loved one. Your fund can also be anonymous. Donor advised funds can be established with a gift of \$5,000 or more.

### 2 CHOOSE

You choose the assets to make a gift to create the fund. The CFMC accepts a wide variety of assets including cash, publicly traded securities, closely held stocks, real estate and tangible personal properties. You can also direct a gift from your will or trust.

### 3 GIVE

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

# Thank You!

Our accomplishments are only made possible through your support.



#### Monterey Office

2354 Garden Road, Monterey  
CA 93940  
831.375.9712

#### Salinas Office

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



[info@cfmco.org](mailto:info@cfmco.org)



## OUR VALUES

We **advance positive change** through grantmaking, community engagement and collaboration.

We **build a legacy for future generations** through responsible stewardship of the resources entrusted to us.

We **operate with the highest standards** of integrity, ethics and accountability.

We **embrace diversity, equity and inclusion**.

We **commit to fairness and respect** for the dignity of all people.

We **are open and honest** with our philanthropic partners, grantees and the community.

We **strive for excellence** in all that we do.



## Healthy, Safe, Vibrant Communities

