CONNECTING for Good

Here for Good

Community Foundation for Monterey County
Table of Contents

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

 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
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.
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.

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
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.

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.

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.

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.

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.
**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 County 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.

---

**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.

---

**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.
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 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 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
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.

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

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
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

永利@) Rudolfo Tapia, Jose Olivares and Julio Martinez, King City Boxing Club
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 Snavely, 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.

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

---

**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

---

**FAST FACTS**

- **2018**
  - Year founded
- **$37,500**
  - Granted in 2021
- **8**
  - Organizations supported
- **$81,297**
  - Total granted since inception
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.

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.”

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
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 to learn more.
Inspiring Philanthropy

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.”

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.”

WE LIKE GIVING HERE. WE LIKE THAT IT STAYS LOCAL.
– John and Annette Romans
Mission Ranches Fund
John and Annette Romans Family Fund
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

“

Javier Zamora
JSM Organics, FarmLink client

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 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.

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.

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 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.
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

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

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.”
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
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


*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. We would be honored to assist you.
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.

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.
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
Foundations 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 # 2085 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
Nellie Irons Orr Scholarship Fund
Pacific Repertory Theatre Endowment Fund
Orchestra in the Schools Endowment Fund
Rancho Cielo Endowment Fund
Salinas Rodeo Rotary Club Foundation Agency Stewardship Fund
Salinas Valley Fund
San Francisco Opera Endowment Fund
San Luis Obispo County Fund
Santa Cruz Museum of Art Endowment Fund
Saratoga Community Foundation Endowment Fund
Serra University Endowment Fund
Sphinx Theatre Company Endowment Fund
St. Mary’s College California Endowment Fund
Sunset Theater Endowment Fund
Teri Belli, Mel and Regina Mason, Dan Baldwin

“THE MASONS ARE A TRUE FORCE FOR GOOD. THEY ARE COMMITTED TO DOING WHAT IS RIGHT.”
– Teri Belli
CFMC Board Chair
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 Stewardship Fund
Monterey County Pops Stewardship Fund
Monterey Peninsula Stewardship Fund
Nepenthe/Phoenix Corporation Fund
Northern Monterey County Stewardship Fund
Ocean County Stewardship Fund
Over 50 Stewardship Fund
Peace of Mind Dog Rescue Stewardship Fund
Paradise Park Foundation Stewardship Fund
Parks and Recreation Stewardship Fund
Paul and Virginia Friedman Fund
Peace of Mind Dog Rescue 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 Fund

Communities for Sustainable Monterey County Teacher Pathway Fund: CSUMB
Charles Auguste de Guigné Charitable Foundation
Frances Elgan & Werner Kunkel Fund

Josephine V. Kernes Adaptive Aquatics Stewardship Fund

Equity Music Monterey Stewardship 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. Ingrim Fund
Bob Jones Boy Scout Camping Fund
The William Kiepura Fund
Jack and Patricia Kilmartin Fund

Esther H. Lindsey Youth Fund**

Sandy Loiacono Scholarship Fund
John H. Marble Endowment Fund

MBD Fund

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**
The 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**
Donors advise funds from their fund to support nonprofit organizations and benefit from CFMC staff expertise and support to enhance their philanthropy.

22. Love Fund
23. Zekai and Carolyn Akcan Fund
24. Amy Anderson and George Somero Fund
25. Anonymous Donor Temporary Fund
26. Antle Family Fund
27. Rick and Tonya Antle Fund
28. Armstrong Family Fund*
29. Joey & Dewitt Astin Memorial Fund
30. Ausonio Family Fund
31. Dan Baldwin and Anne Ylvisaker Fund
32. Bareuther Family Foundation
33. Peggy Downes Baskin Fund for Women’s Reentry
34. Lino and Teri Belli Family Fund
35. The Benjamin Family Foundation
36. Marta L. Bennett Fund
37. Mads and Susan Bjerre Charitable Fund
38. Sarah and Robert Bouchier Fund
39. Howard Franklin Bowker Numismatic Projects Fund
40. Bright Futures Fund
41. The Brown Family Fund
42. Buccafumi-Lawrence Fund
43. Buchalter/Adler Family Fund
44. The Buffett Fund
45. Josephine Bunn Fund
46. Dale and Margaret Byrne Family Fund*
47. California Rodeo Salinas Fund
48. Carmel Gives Fund
49. Chappellet, Youth, Arts, and Ecology Fund
50. Chris's Fund
51. Colleagues of the Arts Endowment Fund
52. Collins Family Fund*
53. Julie Conrad Donor Advised Fund*
54. Cormoran Fund
55. Scott Corwon Fund
56. John and Nessie M. Cuda Family Fund*
57. Cynthia Snorf Fund
58. Andrew & Phyllis D’Arrigo Fund
59. D’Arrigo-Martin Fund
60. Stephen V. Davies Family Fund
61. Ila Davis Fund
62. Donald McEnery Davis Charitable Fund
63. Eric and Ila Davis Fund
64. Dekker Davidson Foundation
65. DeLay-Magnuson Foundation Fund*
66. Marcia F. DeVoe Fund
67. Dewey Foundation Fund
68. Devitt Fund
69. Marti and Steve Diamond Charitable Foundation Fund
70. Martin and Nancy Dodd Fund
71. Helen R. Doe Fund
72. Dooling Family Fund
73. Doolittle Fund
74. Jean and Jim Duff Fund
75. Engstrom and West Fund*
76. Davis Factor, Jr. and Christine B. Factor Fund
77. Davis Factor, Jr. Fund #2
78. Farrell/Allen Carmel Rotary Fund
79. Farrell/Allen/LaSalle Carmel Rotary Fund
80. Doris Parker Fee Fund
81. Doris Parker Fee Fund #2
82. Love Our Central Coast Feed the Homeless Fund
83. Ted Fehring Family/Carmel Host Lions Club Fund
84. Ted Fehring Family/Carmel Host Lions Club Fund #2
85. Jose F. Fernandez Fund
86. Monterey Firemen's Charitable Association Fund
87. Anne R. Fitzpatrick Foundation Fund
88. Lori and Lou Flagg Memorial Youth Fund
89. Frances Memorial Fund
90. Renee Franken Giving Fund
91. Franklin Legacy Fund
92. Friends of Community Animal Services Fund
93. Friends of Sunset Donor Advised Fund
94. Fuhs Family Foundation Fund
95. Fund for the Salinas Valley
96. Fuqua Family Foundation Fund
97. John and Laura Gamble Family Fund*
98. The Joel and Dena Gambord Fund
99. Gaver Family Fund*
100. Gerosin Fund
101. Jim and Barb Gianelli Family Fund
102. Tracy Gibbons Charitable Fund*
103. Bradley K. Gjerding Fund*
104. Global Student Leadership Fund
105. Gloria Fund
106. Jessica Govea-Thorbourne Memorial Fund
107. Tom Granger Memorial Fund
108. Harlan and Barbara Hall Fund
109. Richard Hamilton and Debra Schadeck Charitable Fund
110. The Peter and Jackie Henning Fund
111. Herman-Mellon Family Fund*
112. Joseph and Elizabeth Heston Family Foundation
113. Hicks Fund for the Arts
114. Carol and Don Hiburn Fund
115. The Ann Mayer Hiller Memorial Fund
116. Elmer G. and William G. Hitchcock Fund
117. Mary and Peter Hobley Memorial Fund
118. Hodges Family Fund
119. Jeanne Smith-Holmquist Fund
120. Chip Hooper Foundation
121. Tom Hopkins Wilderness Fund
122. David G. Huey and Carla S. Hudson Family Fund
123. Hughes-Rivera Family Fund
124. Huth Family Fund
125. Ann and Brian Jacobson Charitable Fund
126. Janzen Family Fund
127. Jett Fighter Fund*
128. Birt and Kathleen Johnson, Jr. Fund
129. Victor and Lynda Johnson Fund*
130. Colburn and Alana Jones Foundation
131. Karen Judkins and Steven Wade Fund
132. Leslie B. Kadis, MD & Ruth McClendon Foundation Fund
133. Kadushin Robinson Fund
134. F.B. and B.H. Keith Fund
135. Carol and Chuck Keller Family Fund
136. Karen M. and Brendan P. Kelly Fund
137. Robert & Angela Kent Fund*
138. Steven D. Kesselering and Jean M. Forrest Fund
139. Frank and Michelle Knight Family Fund
140. Kobrinsky Evans Family Fund
141. The Kohn Family Theatre and Arts Fund
142. Phyllis Geer Krystal Fund
143. Barbara Paul and Tom LaFaille Fund
144. The Landreth Family Fund
145. James and Susan Lansbury Fund
146. Jefferson and Frances Larkey Memorial Fund
147. Lee-Alexander Family Fund
148. Lehman Family Fund
149. William R. and Duncan B. Lewis Family Foundation Fund
150. Phyllis and Herbert Lister Fund
151. Live and Give Fund
152. Valera Whitford Lyles Fund
153. MacGowan Pathwaynder Fund
154. John and Kristina Magill Fund
155. Mahoney/Peterson Family Fund
156. The Marcus Family Fund
157. The Marcus Family Fund #2
158. Cambrel B. Marshall Fund
159. Cappy Martin/Vernon Hurd Monterey Rotary Club Fund
160. McHenry Family Fund
161. Kim and Steve McIntyre Fund
162. McMahan Family Fund
163. Catherine L. and Robert O. McMahan Fund
164. Marjorie McNeely Fund for the Blind or Illiterate
165. Richard and Grace Merrill Fund
166. Lenore and Dale Meyer Fund
167. Lenore and Dale Meyer Fund #2
168. Malcolm and Joanne Millard Fund
169. Perry and Barbara Miller Family Foundation Fund**
170. Clint and Karen Miller Charitable Fund
171. Mills Family Fund

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

– Amjad Noorani

Noorani 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
Valentin Fund
Vanderbilt Charitable Fund
Joe Rock and Robin Venuti Family Fund*
Gabrielle Andrea Walters Fund*
The Jackie and Mark Wendland Fund
Maja, Eva and Cody West Family Fund
Ben and Mary Ann Whitten Fund
Wiegand Family Foundation
Willemsen Family Fund
Bill and Kathi Wojtkowski Fund
Wold Family Foundation
Martin R. Wolf Family Fund
Yoga For All Movement Fund
Zalan Family Fund
Marsha McMahen Zelius Fund
Zeva 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 Tod 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 Fair 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
Gunn 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 Tart 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 provide 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
Cislin 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 Roo 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 Hormozzi Anable Scholarship Fund for Women in Math & Science*

\[ (l to r) Rick and Martha Kennerk, Pam and Giff Lehman at the Celebration of Philanthropy \]
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
Casilda Paul Memorial 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 Elkmor 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 Fund
Girls’ Health in Girls’ Hands Scholarship Fund

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

Howard and Gretchen Leach Scholarship Fund
#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. Myszk 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 Palastrini 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 Fund
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

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**

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
Monterey County 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 Foden Park Playground Fund
Rudolph E. Futer Restricted Purpose Fund

*New Fund created in 2021
** New Fund created as of May 31, 2022

CFMC Staff greet guests at the Celebration of Philanthropy

Hope, Horses & Kids
## 2021 Financials

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

### Additions

<table>
<thead>
<tr>
<th>Contribution</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions*</td>
<td>34,880,610</td>
</tr>
<tr>
<td>Other income</td>
<td>613,046</td>
</tr>
</tbody>
</table>

**Total revenues and support**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment gain</td>
<td>35,044,500</td>
</tr>
</tbody>
</table>

### Grants and expenses

<table>
<thead>
<tr>
<th>Expense</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants*</td>
<td>34,792,196</td>
</tr>
<tr>
<td>Other operating expenses</td>
<td>4,464,851</td>
</tr>
</tbody>
</table>

**Total grants and expenses**

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>39,257,047</td>
</tr>
</tbody>
</table>

### Net assets

<table>
<thead>
<tr>
<th>Beginning of year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$271,929,112</td>
<td></td>
</tr>
</tbody>
</table>

**End of Year**

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$303,210,221</td>
</tr>
</tbody>
</table>

*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

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

**Total assets**

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$385,630,163</td>
</tr>
</tbody>
</table>

#### Liabilities and net assets

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants payable</td>
<td>2,038,614</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>214,508</td>
</tr>
<tr>
<td>Liabilities under split-interest agreements and charitable remainder trusts</td>
<td>15,345,401</td>
</tr>
<tr>
<td>Funds held for others</td>
<td>64,821,419</td>
</tr>
</tbody>
</table>

**Total liabilities**

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$82,419,942</td>
</tr>
</tbody>
</table>

**Total net assets**

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$303,210,221</td>
</tr>
</tbody>
</table>

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: 45
- Big Sur Area: 39
- South of King City: 29
- Castroville and North County: 59

**TOTAL** $36,608,378

2,192 grants

**Grants by Region**

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

**TOTAL** $36,608,378

2,192 grants

**Grants by Type**

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

**TOTAL** $36,608,378

2,192 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

2,192 grants
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
  Integris 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
Betsey 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!
2021 Board Committees

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

Audit
Loren Stock (Chair), Teri Belli, Elsa Mendoza Jimenez, Judy Guzman Krueger, Jan Vanderbil

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 Stock, 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 Vanderbil (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 Stock, Jan Vanderbil

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 Stock, Lorraine Yglesias-Rice

Community Fund for Carmel Valley
Alan Crockett (Chair), John Aliotti, Tess Arthur, Anthony Belluci, 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 Austin, Lance Batistich, Ricky Cabrera, Don Chapin, Anne Herendeen, Karen Miller, Manuel Osorio, John Phillips, Abby Taylor-Silva

Scholarships

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

Siemba Latinos Fund Advisory Board
Ida Lopez Chan (Chair), Chris Barrera, Patricia K. Cruz, Daniel Rodriguez, 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-Martín, Susan Galvin, Jeri Gattis, Krista Hanni, Felicia Perez Kausin, Judy Guzman Kruger, Kate Daniels Kurz, Julieanne Leavy, Jana Nason, Kim Negri, Barry Peterson, Judee Profeta, Diane Danvers Simmons, Traci Townsend-Gieg, Jeannette Tuitele-Lewis

In Memoriam

Mary Clapper
Legacy Society Member
Scholarship Fund Holder

Barbara Miller
Legacy Society Member

Gladys Olvis
Scholarship Fund Holder

Robert Danziger
Legacy Society Member

Dr. Allen Fuhs
Fund Holder

Basil Mills
Former CFMC Board Chair
Fund Holder

Alfred Diaz-Infante
Former CFMC Board Member

Susie Franklin
Fund Holder

Perry Miller
Legacy Society Member

Dr. John Phillips
Legacy Society Member

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

Joseph Rock
Legacy Society Member

In Memoriam
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 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.
Healthy, Safe, Vibrant Communities

Thanks to many generous donors, the CFMC granted $36 million in 2021 to hundreds of nonprofits. Shown here: Youth Arts Collective.