

CELEBRATING

PHILANTHROPY

The mission of the Community Foundation for Monterey County (CFMC) is "To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County." The annual Celebration of Philanthropy, held October 5th at The Club at Pasadera in Monterey, thanked the CFMC's many donors and nonprofit partners for their support.

Each year the CFMC Board of Directors presents the Distinguished Trustee Award to an individual or couple who demonstrate philanthropic leadership in our region. Board Chair Teri Belli presented the 2022 award to Bruce and Linda Taylor.

“ Bruce and Linda don't seek accolades.
They give because it is who they are.
Wherever there is a need, there they are. ”

— Teri Belli, 2022 CFMC Board Chair

The Taylors truly "Give Where They Live." They (and the Taylor Farms company) consistently support hundreds of nonprofits with a focus on health and wellness, youth development and education. They helped transform Salinas by constructing the Taylor Farms headquarters in Salinas City Center.

At the Celebration, CFMC President/CEO Dan Baldwin recounted the Foundation's critical work, including a record \$36.6 million granted during 2021. Teri Belli recognized and thanked retiring



Celebration of Philanthropy 2022 (l to r) Dan Baldwin, Teri Belli, Linda Taylor, Bruce Taylor, Angela Diaz, Christine Dawson

board members Betsey Pearson, Fred Meurer and Nolan Kennedy for their service.

Bruce Taylor spoke about the need to continue giving in Salinas to improve the well-being of communities in Monterey County. As award recipients, the Taylors designated two \$5,000 grants from the CFMC to the nonprofits of their choice, choosing Digital Nest and First Tee Monterey County.

The evening's program also included remarks from Taylor Farms scholarship recipient Angela Diaz. The Taylor Farms Scholarship Program at the CFMC has awarded \$3.1 million to children of full-time company employees since 2008.

To view photos of the event and a video of the full program, please visit cfmco.org/COP2022.

Community Impact Investment

The Community Impact Investment (CII) program is one of the many tools the CFMC employs to propel its vision of "Healthy, Safe, Vibrant Communities."

The CFMC allocates a small percentage of its investment portfolio to make local placements that will create local impact. In its first phase, this took the form of loans to Community Development Finance Institutions (CDFIs) who then reloan the funds to small businesses that would have trouble obtaining traditional financing. California FarmLink, Accion Opportunity Fund, and the Mission Economic Development Agency (MEDA) on behalf of the El Pajaro Community Development Corporation all received loan capital from the CFMC that they then



A CFMC CII loan supported the United Way Community Impact Center campaign

continued on page 7



President/CEO Dan Baldwin at the Southern Monterey County Foundation reception

President's Message Meeting Changing Needs

One of the most satisfying aspects of being part of the CFMC is seeing how we respond to changing circumstances. The best-known example

is our disaster response work. In my 12 years we've had to establish four fire funds, with the 2020 fund including three sub-funds to allow donors to provide direct support to any of the three fires that were burning simultaneously in Monterey County. When Pfeiffer Canyon Bridge in Big Sur was closed (and rebuilt) we created a fund to support hospitality workers left without jobs.

The COVID-19 Relief Fund was started even before shelter-in-place orders were issued. Thanks to a tremendous outpouring of generosity, that fund granted more than \$4 million. But a lesser known offshoot was the COVID-19 Small Business Relief Fund, created and implemented in partnership with the Monterey Peninsula Chamber of Commerce. While it made smaller grants, they came at a critical time for businesses.

The COVID-19 Collaborative created a multi-sector table where folks from hospitality, philanthropy, health care, education, agriculture, nonprofits and education could problem solve collaboratively. A subset of this work is the VIDA program (funded by the County of Monterey), in which community health workers successfully worked with some of our most vulnerable populations.

Changing circumstances involves more than disaster response. The CFMC's Community Impact Investment program (highlighted in this issue) is a good example. Started five years ago, it uses a small percentage of the CFMC's investment portfolio to make placements that will have a direct impact on Monterey County. Initially, this took the form of loans to Community Development Finance Institutions, who then re-loaned the capital to start-up businesses and growers, creating and retaining jobs.

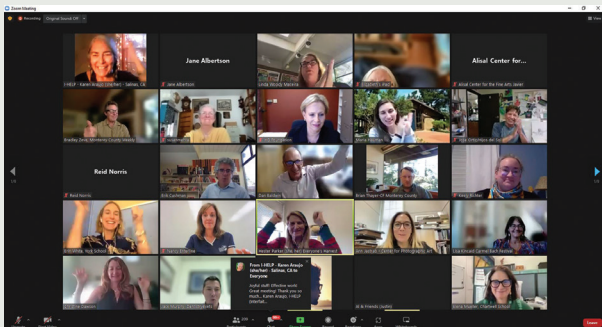
“The CFMC is a continually evolving entity. It's exciting to wonder what will come next.” — Dan Baldwin, CFMC President/CEO

Loans have also been made to CHISPA in support of an affordable housing project in South County, and most recently a loan to the United Way to help purchase a building in Old Town Salinas. This building now serves as their headquarters, but also a place for nonprofits to gather and work. It is appropriately called the Impact Center.

The Community Impact Investment program is meeting a new set of needs with creative new solutions. It also brings market rate returns to our investment portfolio, the source of \$37 million in grants in 2021 and more than \$26 million so far in 2022.

The CFMC is a continually evolving entity. It's exciting to wonder what will come next.

MC GIVES! Monterey County Gives! Supports 200+ Nonprofits



Nonprofits meet to plan a successful MC Gives! campaign

The Monterey County Gives! campaign provides participating nonprofits a platform to share their big ideas and leverage end-of-year giving thanks to donors to the matching fund. Gifts made between November 10th and December 31st through MontereyCountyGives.com support more than 200 nonprofits with a partial match. Two CFMC funds are participating this year: the Siembra Latinos Fund and the Fund for Homeless Women.

“Gives! has become an enormous initiative. Lots of donors look to it as the portal they are going to use for year-end giving, whether they are supporting a single or multiple nonprofits,” said Dan Baldwin, CFMC President/CEO.

Donors can make one gift to benefit several nonprofits. Gifts of stock or IRA Qualified Charitable Distributions are accepted. Since launching in 2009, more than \$45 million has been raised and granted to hundreds of Monterey County nonprofits. Please call 831.375.9712 or visit montereycountygives.com for more information.



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

Siembra Latinos Fund Celebrates 5th Anniversary



Siembra Latinos Fund Advisory Board members and CFMC staff at the 5th Anniversary Celebration

The Siembra Latinos Fund recently celebrated five years of inspiring giving by and for Latinos. The fund has granted more than \$80,000 to nonprofit organizations and causes to uplift the Latino community. Gifts to the fund help create meaningful opportunities now and in the future.

Supporters gathered on August 27th at Rustique Winery in Salinas to learn about Siembra's impact. KION's Veronica Macias emceed the program, which included current Board Chair Ida Lopez Chan, Community Impact Officer Joel Hernandez Laguna, Palenke Arts Executive Director Juan Sanchez and founding board member Blanca Zarazúa.

“The Latino community is very generous. Siembra is an opportunity to build on a culture of generosity.”

— Ida Lopez Chan, Siembra Advisory Board Chair

PG&E's Teresa Alvarado announced a grant of \$10,000 to support Siembra grantmaking, and Union Bank provided \$5,000 as a challenge gift for the Monterey County Gives! campaign. Donations through montereycountygives.com/Siembra from November 10-December 31, 2022 will receive a partial match.

View photos or learn more at: cfmco.org/Siembra.

Thank you to our generous event sponsors:

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AMIGO SPONSORS:

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Thank you to our food and beverage donors: La Plaza Bakery, El Rancho Market, Las Cazuelas, Lepe Cellars, Sling | Stone, El Tequila de Don Pilar, Suerte Tequila, Tequila Alquimia, Driscoll's, JAS Family Farms, JSM Organics and decor sponsors Coastal Callas and Regalos Happy Face

VIDA Program Expands Focus



VIDA continues to be an important focus of the CFMC. Community Health Workers (CHWs) help bridge the health equity gap by bringing critical resources and information to the communities that need them. As the pandemic has shifted, so has VIDA. Breaking the chain of infection remains VIDA's most prominent task, but it has branched out to other areas significantly impacting the community.

VIDA recently partnered with United Way and VNA (Visiting Nurses Association) to bring Covid-19 vaccine clinics throughout Monterey County. They visit places that have had few clinics and provide incentives for families to vaccinate their children. VIDA CHWs can also provide Narcan to community members to help combat the opioid epidemic. Anyone who has friends or family suffering from substance use disorder should keep this life-saving tool on hand.

California recently expanded

Medi-Cal to all

eligible adults 50 years of age and older regardless of immigration status. VIDA CHWs are trained to assist community members with Medi-Cal applications and answer common questions.

VIDA continues to operate under the belief that, "My family is not healthy unless yours is." The pandemic has continued to reinforce how connected we truly are. The VIDA program has been a community effort, with funding from Monterey County, the CFMC and other entities. Monterey County has helped VIDA grow and develop into a community support infrastructure that has saved lives. Learn more: cfmco.org/VIDA.



VIDA Community Health Workers help staff mobile vaccine clinics

Reconnecting – Event Round Up

The CFMC has been busy reconnecting in person with donors and friends at gatherings throughout Monterey County. Thank you to the generous individuals, families and businesses who make these events possible so our communities have the philanthropic resources they need to improve lives.

Affiliate Fund Events

CFMC affiliate fund events help donors give back to regions and causes that are important to them. Affiliate funds are governed by local advisory boards consisting of knowledgeable community members who provide oversight, raise funds, define grantmaking priorities and award grants. The CFMC provides administrative, investment and grantmaking expertise.

Southern Monterey County Foundation

The Southern Monterey County Foundation (SMCF) event took place on August 13th at the historic San Bartolome Ranch in Bradley. The SMCF Advisory Board shared the impact the fund has made to organizations improving the quality of life in South County. Special thanks to Stan and Barbara Clark for hosting.

Community Fund for Carmel Valley

The Community Fund for Carmel Valley (CFCV) held its Strengthening & Celebrating Carmel Valley event at Stonepine Estate on July 27th. Guests heard from grantees and CFCV Advisory Board Chair Alan Crockett and mingled with other supporters. Thank you to Stonepine Estate for hosting the reception and to Joyce Wine Company for providing wines.

Northern Monterey County Foundation

The Northern Monterey County Foundation (NMCF) gathering was held on May 5th at Driscoll's in Aromas. Guests enjoyed greenhouse tours, learning about the NMCF, and meeting with other community members. Thank you to Driscoll's for hosting the greenhouse tours and reception at O.O. Eaton House and to Ricky, Cece and Lucky Cabrera for providing food and drinks.



Northern Monterey County Foundation Advisory board members and CFMC staff

Community Fund for Carmel Valley reception



Southern Monterey County Foundation event



Above: Creating Your Legacy luncheon; Right: Fund for Homeless Women 10th Anniversary celebration

In addition to receptions for affiliate funds, additional events included the Siembra Latinos Fund 5th Anniversary (see page 3), a professional advisor luncheon and the events below.

Fund for Homeless Women

Friends both old and new gathered at Monterey Peninsula Country Club on August 11th to celebrate the 10th anniversary of the Fund for Homeless Women. Founders Michael Reid, Marion Penn and Kathy Whilden were honored, and Karin Strasser Kauffman received the first Three Amigos award. Thank you to the many donors for helping unsheltered women on the Monterey Peninsula.

Women's Fund

The CFMC Women's Fund presented "Women & Finances" at our Monterey office on July 19th. Attendees learned steps women can take to enhance their financial security, such as building a trusted team to help reach financial and charitable goals. Special thanks to Carle Mowell for sponsoring the program and to panelists Jennifer Walker Esq. of Leach & Walker, Jan Vanderbilt of Vanderbilt CPAs P.C. and Allison Barrientos, CFP, Integris Wealth Management, LLC.

Creating Your Legacy

The goal of gift planning is to create peace of mind for you and lasting benefit for your community. Dan Baldwin and Christine Dawson shared how to create a philanthropic legacy at a May 17th "Creating Your Legacy" luncheon at Corral de Tierra for CFMC fund holders. Our new Guide to Gift Planning is available at cfmco.org/GiftPlanning.

A Grand Finale

S.T.A.R. Foundation Closes with \$500,000 Grant to Sol Treasures, Endowed Arts Scholarships

Reg Huston has received many awards in his 50+ years as a professional musician and philanthropist. He and Erica Horn, of the S.T.A.R. (Support the Arts Regionally) Foundation, exemplify what it means to give.

Reg, who had been involved in theater and the performing arts in California since 1973, started the S.T.A.R. Foundation in 2008, approaching the CFMC in 2010 to create a fund for giving back.



Reg Huston presents \$500,000 grant to Jeff Hinderscheid and Jamie Jones of Sol Treasures

Since then, the S.T.A.R. Foundation granted nearly \$1.2 million to more than 80 local nonprofits supporting the performing arts. The Foundation also provided \$200,000 in scholarships to students pursuing the performing arts after high school.

“If you don’t have the arts in your life, what’s the point of living?” – Reg Huston

“We want students not necessarily to become professional performing artists, but we want them to be sensitive adults,” said Reg.

After nearly 15 years of giving, Reg made the decision to dissolve the foundation in 2022, granting the majority of the remaining funds – \$500,000 – to one single organization: Sol Treasures in King City. “The investment in Sol Treasures will impact hundreds of kids,” explained Reg.

“When we announced the gift, it inspired a standing ovation and tears – it was so meaningful to the community,” said Erica. Added Reg, “This grant will solidify Sol Treasures in South County, and we hope it will inspire further giving.”

The S.T.A.R. Foundation also created the Reg Huston/ S.T.A.R. Scholarship for the Performing Arts, an endowed scholarship fund of the CFMC. “We had a strong desire for people to continue participating in the performing arts into adulthood,” said Erica.

Concluded Reg, “You’re better adults if you’re in the performing arts as a youth. We hope that the scholarships fund will continue to grow for as many students as possible.” To learn more, please visit cfmco.org/STAR.

New Funds Created*

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

Agency Endowment Funds

Carmel Youth Center Endowment Fund
Rancho Dos Arroyos Facilities and Maintenance Endowment Fund

Agency Stewardship Funds

Carmel Youth Center Fund
Community Kitchen Fund
COPA Catalyst Fund
Equine Healing Collaborative Stewardship Fund
Friends of the Pacific Grove Public Library Youth Services Fund
Friends of the Pacific Grove Public Library Fund
Health Projects Center Stewardship Fund
Helen Johnson Endowment Fund
IOC/Joining Hands Benefit Shop Stewardship Fund
Monterey College of Law Fund
Pacific Grove Museum of Natural History Operating Reserve Fund
Rancho Dos Arroyos Facilities and Maintenance Endowment Fund

Donor Advised Funds

#liveforross: A Fund for Safety Awareness and Vocational Education
Willa and Sienna Aylaian Higher Education Fund
Housing for Kids
Kathy Kever Charitable Fund
Men’s Golf Association (MGA) at Quail Lodge Community Impact Fund
Gary and Diane Nelson Foundation Fund
Ridgewalker Fund
Shing Taylor Fund

Scholarship and Award Funds

Ausonio Family Scholarship Fund
Bert P. Cutino Professional Chef Scholarship Fund
E.G. Young Computer Science and Information Systems Scholarship Fund
Reg Huston/ S.T.A.R. Scholarship for the Performing Arts
Libby Olver Scholarship Fund
The Traven Tapson Foundation Fund

Special Purpose Fund

Del Rey Oaks Basketball Court Fund
The County of Monterey COVID-19 Memorial

*Since March 2022



The #liveforross fund was created in memory of Ross Tarp-Braasch

The Legacy Society Welcomes New Members

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

Jean Duff
Sandra Forman

Beverly D. Holloway
John and Tama Olver

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

CFMC Awards \$2.1 Million in Community Impact Grants

The CFMC's strategic plan embraces a countywide vision of "Healthy, Safe, Vibrant Communities." Community Impact (CI) Grants address critical issues and opportunities in five program areas that advance this vision. The CFMC awarded \$2.1 million this year to 92 nonprofits through this program. Grants are made in the areas of Children & Youth Development; Health & Human Services; Community Development; Arts, Culture & Historic Preservation; and Environment & Animal Welfare. Unrestricted and field of interest donations (primarily from estate gifts) to the CFMC's Fund for Monterey County fuel these grants each year in perpetuity.

Hijos del Sol, a small community-based arts organization serving youth in East Salinas, received \$10,000 for its Migrant Education Program. The funds will support its year-round after-school and school break workshops for 300 children, which offer free arts instruction, materials and studio space at the Migrant Education Center on the campus of Sherwood Elementary School in East Salinas. Ten young adults will also have the opportunity to apprentice and assist with exhibits and murals.



Students artists from Hijos del Sol

"The heart of our activities lies within East Salinas neighborhoods, where studio space and other supports for young artists are inaccessible or non-existent," said a representative of Hijos del Sol. "Art instruction allows student artists to gain employable skills while learning to heal harmful experiences, communicate and collaborate effectively."

Students involved in the program also have the opportunity to contribute to Día de Muertos, an important community celebration with a collective altar and exhibit presented annually by Hijos del Sol that commemorates and keeps alive the cultural heritage of indigenous peoples.

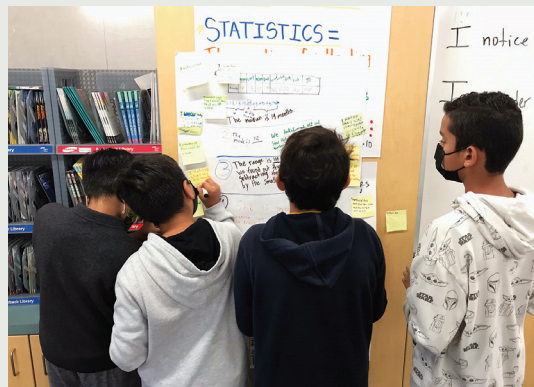
View all grantees at cfmco.org/RecentGrants or visit cfmco.org/FundforMontereyCounty to learn about supporting local grantmaking.

Expanded Learning Grants

The San Diego Foundation granted millions in spring 2022 for school programs to expand learning opportunities for children in California. The San Diego Foundation selected the CFMC to be one of eight participating community foundations to regrant the money.

The CFMC granted \$665,420 to 14 organizations through a competitive grant program for before and after-school or summer enrichment programs. The goal is to increase equity in education and address the learning loss, isolation and social-emotional impacts of the COVID-19 pandemic.

"These investments are geared towards students experiencing the greatest gaps in learning and little to



Silicon Valley Education Program Elevate Match program in Monterey

“We were pleased to award grants quickly to help fill gaps made worse due to the pandemic.”

— Laurel Lee-Alexander
CFMC VP of Community Impact

no access to this type of programming,” explained Laurel Lee-Alexander, CFMC VP of Community Impact. “We were pleased to award grants quickly to help fill gaps made worse due to the pandemic.”

The CFMC awarded grants to: City of Greenfield (Greenfield Community Science Workshop); Community Partnership for Youth; Foundation for Monterey County Free Libraries; Girls Inc of the Central Coast; Harmony at Home; Hope, Horses & Kids; International School of Monterey; Pacific Grove Museum of Natural History; Rancho Cielo; Read to Me project; Silicon Valley Education Foundation; Ventana Wildlife Society and Youth Arts Collective.

Community Impact Investment, *continued from page 1*



CII FarmLink loan recipient Cecilia Rojas Gonzalez of Rojas Tepetitla Organic in Salinas

lent to start-up farmers, women entrepreneurs, family businesses in Pajaro and much more. All of the loans went through vigorous underwriting. The CFMC separately contracts with Community Capital Advisors, who provides twice yearly reports on the health and status of the loans, and also tracks impact such as jobs created and/or retained. Interest on the loans flows 100% back into the CFMC investment portfolio.

CII is overseen by a board committee, chaired by Nolan Kennedy. From the outset the committee investigated ways the program can impact affordable housing, a chronic problem in Monterey County. A loan to CHISPA, Monterey County's largest nonprofit affordable housing developer, is supporting the construction of affordable housing units in King City.

Most recently, the CFMC loaned United Way for Monterey County \$1 million to support the purchase of their Community Impact Center in downtown Salinas. The building purchase provides a centralized, single location for community benefit. The Center also offers rentable, income generating office space for other nonprofit or governmental organizations.

"The CFMC's belief in the vision of a Community Impact Center and loan support not only helped us with initial financing, but demonstrated a commitment that inspired other funders," said Katy Castagna, President and CEO of United Way Monterey County.

Outcomes and partnerships like these illustrate just how effective Community Impact Investment can be. Learn more: cfmco.org/ImpactInvestment.

“The Community Foundation was the first funder to step up and invest in this project.”

— Katy Castagna, President and CEO of United Way Monterey County



CNE 10 Years Strong: Focus on Leadership



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

The Center for Nonprofit Excellence (CNE) is celebrating ten years of strengthening nonprofits serving Monterey County. CNE works with local nonprofits to be stronger, more resilient and equitable. It helps staff, boards and volunteers make meaningful connections to resources and one another.

While the CFMC has provided leadership and organizational development support to local nonprofits for more than twenty years, these programs officially became the "Center for Nonprofit Excellence" in 2012 to reflect a growing focus on capacity building methods proven to be most effective in the field.

On average, CNE works with more than 160 nonprofits each year, offering learning opportunities, toolkits, grant funding, consulting and more. CNE has awarded more than \$500,000 in Organizational Development grants in the past ten years to boost local nonprofits' effectiveness and resilience.

A key focus for 2022 is investing in leadership through Executive Director Roundtables, a Guide to Leadership Transitions and the LEAD (Leadership, Education and Development) Institute. For more information, visit cfmco.org/CNE.



Local nonprofit executive directors gather to connect and recharge at a recent Breakfast Roundtable

“The CNE has been my and YAC's greatest ally in both support and leadership education.”

— Marcia Perry, ED of Youth Arts Collective (YAC)



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Here for Good
**Community
Foundation**
for Monterey County

Monterey Office
2354 Garden Road
Monterey, CA 93940
831.375.9712

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

cfmco.org
info@cfmco.org

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HEALTHY, SAFE, VIBRANT Communities



Dan Baldwin shares the CFMC's impact at the Celebration of Philanthropy (see page 1)

County of Monterey Creates Fund for COVID-19 Community Memorial

The County of Monterey recently partnered with the CFMC to create the COVID-19 Community Memorial Fund. The Countywide COVID-19 Community Memorial is an opportunity to collectively honor the tremendous loss we experienced since the start of the pandemic and its prolonged impacts.

The Memorial, centrally located at the Government Center's pedestrian plaza at 168 West Alisal Street in Salinas, will provide a space for quiet contemplation for families and loved ones directly impacted by loss, for the community overall to reflect, and to instill hope for the future.

To donate or learn more:
cfmco.org/COVID19Memorial.



CFMC VP Community Impact, Laurel Lee-Alexander (r) serves as Secretary of the Community Foundation National Standards Board

Community Foundation Reaccredited by National Standards Board

The Community Foundation for Monterey County works hard to be "Here for Good" throughout Monterey County. Our 2022 reaccreditation with National Standards for U.S. Community Foundations™ is your assurance that the CFMC meets or exceeds the highest standards for philanthropic excellence and accountability.

National Standards signifies that the CFMC has sound policies and procedures in place for governance, grantmaking and operations, meeting rigorous standards for local philanthropy to meet the unique, changing needs of Monterey County.

To earn our accreditation, the CFMC met strict benchmarks for quality in operations. Experts from a panel of community foundation leaders reviewed documentation for 26 standards in financial stewardship, donor relations and other key areas. Learn more at cfstandards.org.

