

CFMC Grants More Than \$1 Million for Storm Relief

The 2023 winter storms and Pajaro levee breach caused widespread destruction and hardship for many Monterey County residents and their families. People were in immediate need of food, housing and financial assistance.

“The grant allowed us to provide immediate financial aid for basic needs such as emergency rental and utilities assistance, baby supplies, food and other necessities to farm working families.” – Angela Di Novella, Executive Director, Catholic Charities Diocese of Monterey

The Community Foundation for Monterey County (CFMC) created the Monterey County Storm Relief Fund in early January as communities began to suffer from high winds and water. The fund was seeded by the CFMC and a commitment from the Monterey Peninsula Foundation.

Even though floodwaters have receded, Pajaro residents (many of whom lost income and jobs) still need support for basic needs, as well as cleanup, repairs and longer-term recovery.

The CFMC has granted more than \$1 million to provide emergency assistance and relief for needs including food, emergency shelter, financial assistance to those evacuated and support for first responders. 100% of donations to the Monterey County Storm Relief Fund go to local nonprofits for relief, recovery and repair.

The impact of the flood on the Pajaro community will be felt for months and years to come. *(continued on page 8)*



Hundreds of people were evacuated after the Pajaro levee breach

Monterey County Gives! Raises Record \$11.2 Million



Monterey County Gives! had yet another record year. Thanks to 7,698 donors, the 2022 campaign raised \$11.2 million to support 201 area nonprofits, surpassing last year's record by \$1.5 million. The end-of-year giving campaign is structured to provide participating nonprofits a platform to share their missions and leverage year-end giving. Organizations receive a pro rata match provided by donors to the matching fund.

“Monterey County Gives! has become an indelible part of the philanthropic landscape. It's just become so impactful,” said Dan Baldwin, CFMC President/CEO.

Since launching in 2009, MC Gives! has raised and granted more than \$56 million to hundreds of Monterey County area nonprofits. Learn more at mcgives.com.

MC GIVES!

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.

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MONTEREY COUNTY
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President's Message

Neighbor Helping Neighbor

We're already flying into 2023. We started the year with historic storms that damaged buildings and infrastructure, flooded homes and farmland, closed roads and put many temporarily out of work. The CFMC quickly started the Monterey County Storm Relief Fund, and as always seems to happen, our community responded generously – neighbor helping neighbor. The fund also received support from foundations and corporations. The CFMC has granted more than \$1,100,000 to assist those in need.

“We work every day to live up to the promise of being your community foundation.” – Dan Baldwin, CFMC President/CEO

Even as the rain was falling, wind blowing, and thousands sat in the dark, people kept giving to Monterey County Gives!. MC Gives! has set records each of the past four years. When it reached \$5.4 million in 2019, we thought it could go no higher. COVID descended in 2020 and the campaign leapt to \$7.8 million. That had to be the limit! Gives! 2021 reached \$9.7 million. And 2022 brought in an astounding \$11.2 million. I'm going to again declare there is no chance it will keep growing, as that seems to be the formula for even more generosity. Gives! has become Monterey County's highest profile annual giving campaign. The partnership between the CFMC, Monterey

County Weekly and the Monterey Peninsula Foundation has been a tremendous boon to local nonprofits and the populations they serve. The first three words of the CFMC's mission statement are “To inspire philanthropy...”. Gives! is a great example of our mission at work.

The CFMC is very proud to have received the COVID Business Survival Award (in the nonprofit category) from the Monterey County Business Council. We were recognized for establishing the COVID-19 Relief Fund (that granted \$4.4 million), organizing and facilitating the COVID-19 Collaborative and providing oversight to the county-funded VIDA (Virus Integrated Distribution of Aid) program that works with several nonprofits to train and deploy community health workers. Again, neighbor helping neighbor.

These, and other, accomplishments are only possible because of a very dedicated staff and board of directors. At our January board retreat that focused on Diversity, Equity and Inclusion, one of the trainers complimented the CFMC on the breadth of our work, and said, “You're my Community Foundation.” I felt honored by that statement, but also humbled by the responsibility that comes with it. We work every day to live up to the promise of being your community foundation.



Creating A Legacy

We are grateful to be connecting in person once more as the year begins. The Foundation hosted the “Create Your Legacy” luncheon at Corral de Tierra on February 16, 2023. More than 40 people attended and heard about thoughtful planned giving approaches.

Senior VP of Philanthropic Services Christine Dawson spoke about tools for charitable gift planning, income producing gifts and the benefits of legacy giving. Shary Farr of Partners for Transitions provided helpful and compassionate guidance about end-of-life planning and how to make caring estate plans.

“End of life planning is all about love,” said Shary. “Estate plans have emotional consequences. When you are making your plans,



(l to r) Shary Farr and Christine Dawson co-presented at the Create Your Legacy luncheon.

think of your loved ones: give everyone a job, don't keep secrets, have all of your information in one place, and leave love letters. Forgive people. Ultimately, every planning choice we make diminishes fear and allows us to live longer and happier lives.”

Other takeaways included practical advice for compiling and keeping your plans in one place, guidance for specific California regulations, and tools that the CFMC offers for leaving a lasting legacy to benefit the causes you care about now and in the future.

We would be honored to partner with you to fulfill your philanthropic vision. Contact

Christine Dawson or Cecilia Romero at 831.375.9712 to learn more or download a copy of our Guide to Planned Giving at cfmco.org/GiftPlanning.

CFMC Honored for COVID Relief Efforts

The Monterey County Business Council (MCBC) honored the CFMC on Friday, February 24, 2023 at its Silver Anniversary Gala/COVID-19 Survival Awards at the Inn at Spanish Bay.

“The CFMC is honored to accept the nonprofit award. Exceptional generosity from local donors and the spirit of collaboration from many partners made the work possible.” — Dan Baldwin, CFMC President/CEO

Monterey County faced an enormous challenge with the COVID-19 pandemic. The CFMC led the philanthropic response, granting \$4.4 million to local nonprofits through its COVID-19 Relief Fund. Grants helped meet basic needs for vulnerable populations; provided operating support, prevention and recovery programming; and addressed the mental health impacts of COVID-19.

The CFMC served as a community leader beyond grantmaking, acting as a regional activator, convener and catalyst. The Foundation led the COVID-19 Collaborative, a countywide, multi-sector group addressing pandemic response efforts. The CFMC and the COVID-19 Collaborative faced this enormous



President/CEO Dan Baldwin accepts nonprofit award from MCBC President & CEO Kimbley Craig

Photos Kelli Udall



CFMC Board members and guests enjoyed the MCBC COVID-19 Survival Awards

challenge with an equitable approach, allowing space for different voices. This strengthened the VIDA Community Health Worker (CHW) Program, a powerful initiative of community-based organizations with trusted messengers that genuinely understand their communities. The CFMC continues to manage the VIDA program in partnership with the Monterey County Health Department.

Memorandum of Charitable Intent – New!

Many donors are looking to simplify their planned giving. The CFMC recently developed a Memorandum of Charitable Intent (MOCI – pronounced “Moh-Chee”) to help make that process easier. You can meet with a Philanthropic Services team member to review your charitable wishes as part of an estate gift, or to plan the future purpose of an existing fund.

“It’s reassuring to know that my legacy gift will be secure and my wishes fulfilled properly and professionally. Working with the CFMC has been a true gift.” — Tonya Antle, Rick and Tonya Antle Fund, Legacy Society Member

Donors share instructions on how to allocate their gift, whether it’s involving family, creating a new type of fund, or making grants to specific organizations. This is a complimentary service of the CFMC, and the MOCI can be updated at any time at no cost as your wishes may change.

To learn more, please call 831.375.9712 or visit cfmco.org/MOCI.

Plan Your Legacy

Memorandum of Charitable Intent



Plan for Future Giving

When you name the Community Foundation for Monterey County (CFMC) as your charitable beneficiary, you create a lasting legacy. A Memorandum of Charitable Intent (MOCI – pronounced “Moh-chee”) is a simple document to help you create and direct gifts from your donor advised fund or estate, whether through your will, living trust or beneficiary designation. This simple, flexible process is a complimentary service designed to give you peace of mind in knowing your wishes will be fulfilled.

Easy

Your estate planning document names the Community Foundation for Monterey County as the beneficiary of your charitable gift. Your MOCI instructs us how to distribute the gift. Your successor trustee or executor only needs to write one check.

Flexible

Charitable interests often change over time. You can easily update your MOCI, so there is no need to change the original will or living trust documents.

Expert Guidance

We offer years of trusted community knowledge. We will work with you and your professional advisors to create the plan that best suits your charitable goals.

Stewardship

We check in with you periodically to ensure your MOCI continues to reflect your charitable interests.

Your Gift + Your Instructions = Peace of Mind

- 1 DECIDE** There are many options to make a gift through your estate or donor advised fund. Your gift can be a dollar amount, a specific asset, a % of your estate or its remainder. You can also name the CFMC as a full or partial beneficiary of your life insurance policy or retirement account.
- 2 NAME** Include the following bequest language in your will or living trust: “This gift will be made to Community Foundation for Monterey County (CFMC), EIN #04-1615807, a 501(c)(3) nonprofit organization, to be directed as described in my most recent Memorandum of Charitable Intent on file with the organization.” To name the CFMC as the beneficiary of your retirement plan or life insurance policy, the beneficiary name is: “Community Foundation for Monterey County, EIN #04-1615807, per MOCI.”
- 3 INSTRUCT** Work with us to determine what you want done with your gift. You get to decide the nonprofit(s), amount and timing.

HEALTHY, SAFE, VIBRANT Communities

Contact

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cfmco.org/MOCI

“It’s reassuring to know that my legacy gift will be secure and my wishes fulfilled properly and professionally. Working with the CFMC has been a true gift.”
— Tonya Antle, Rick and Tonya Antle Fund, Legacy Society Member

Affiliate Fund Spotlight

SMCF Grants More Than \$23,000 to Local Nonprofits



An SMCF grant to City of King Recreation Department provides free swimming lessons

In its most recent round of grantmaking, the Southern Monterey County Foundation (SMCF) granted \$23,815 to 14 organizations serving King City and points south. The SMCF, an affiliate fund of the CFMC, has granted \$192,000 since 2014 to projects and programs benefiting Southern Monterey County communities.

“I support the SMCF because I have always believed in the power of people helping people. It feels good to know that our grants are making a positive impact in our South County community.” — Oscar Avalos, 2023 SMCF Advisory Board Chair

The City of King Recreation Department received a \$2,000 grant to help fund their Swimming Lesson Program, which provides free swimming lessons to children.

“We are so grateful for the Southern Monterey County Foundation’s continued support of our Learn to Swim program,” said Andrea Wasson, City of King Recreation Manager. “This grant allows us to provide lessons to children who may not otherwise be able to afford them and teaches them a skill that can last a lifetime.”

The SMCF provides an opportunity for donors to pool philanthropic resources to strengthen communities in Southern Monterey County. To learn more or give, visit cfmco.org/SMCF.

CFCV Grants \$50,000 for Program Support and Storm Recovery



CFCV grants helped residents recover from storm damage

The Community Fund for Carmel Valley (CFCV) is a way for residents to come together to help their neighbors. In 2022, the fund granted \$22,500 to eight local nonprofits to support a variety of programs, from

“With the generosity of many people and local organizations, we were able to help,” added CFCV 2023 Advisory Board Chair Alondra Klemek.

The CFCV is an affiliate fund of the CFMC. Learn more or give at: cfmco.org/CFCV.

New Common Application and Deadline for Regional Grants: August 4, 2023

The CFMC is excited to announce that a new single application for select regional/ special purpose funds will open in July. The new deadline is 5 p.m. Friday, August 4 and grants will be awarded in October. The single application will simplify the process for nonprofits applying for grants from the Northern Monterey County Foundation, Southern Monterey County Foundation, Community Fund for Carmel Valley, Weston Call Fund for Big Sur and Siembra Latinos Fund.

For information, please visit cfmco.org/Grants.

youth camps to home delivered meals programs. More recently, they sprang into action as the January 2023 storms flooded Monterey County.

The Advisory Board of local community members activated its Carmel Valley Disaster Relief Fund on January 11th, granting \$15,000 to Carmel Valley Rotary Club Foundation to purchase gift cards for residents impacted by the storms.

“People really appreciated the gift cards, especially for lumber and general-purpose items,” said Joseph Hertlein of the CFCV Advisory Board. Another \$12,500 has since been granted to Carmel Valley nonprofits providing additional storm relief services.

Making a Difference

Gordon Schacher

Gordon Schacher was inspired to give by his late wife, Elke. "One day, Elke came home and said, 'I've just been at Target, and a man outside asked me for money. Instead, I asked him what he needed. He said a sleeping bag, so I went inside and bought him one.'" This single incident inspired decades of giving to the unhoused of Monterey.

Gordon visited local encampments in Monterey every week. "At first, I just started bringing people things. Whatever they needed – food, supplies. I'd sit and eat a meal with everyone."

"A few years after Elke passed, I thought, I'd like to do something for her. She started this whole thing." Thus was born the Elke Junger Making A Difference Fund of the CFMC. Gordon recommends grants to homeless service providers, including Gathering for Women and Dorothy's Place, for direct support for individuals. "What matters to me most is helping people with day-to-day living," said Gordon, who advises the fund along with his son.



Gordon Schacher created the Elke Junger Making a Difference Fund in honor of his late wife

“It's our responsibility to do something. And it's fun! People are always totally amazed to have help, to have needs filled. It makes me feel happy to give.” – Gordon Schacher

"What I care about is having the Make a Difference concept continue," he added. "I just want to see good things happen." Gordon described his experience working with the CFMC as a happy one. "It's just fantastic! I'm hoping this will last another 20 years. It's our responsibility to do something. And it's fun! People are always totally amazed to have help, to have needs filled. It makes me feel happy to give."

Read Gordon's story at: cfmco.org/Schacher.

New Funds Established*

The CFMC manages more than 700 funds established by individuals, families and businesses. For those who wish to establish or contribute to a CFMC fund, please contact Christine Dawson or Ceci Romero at 831.375.9712 to learn more or visit cfmco.org/WaystoGive.

Agency Stewardship

The Herman & Helen Kasavan Stewardship Fund
LandWatch Legacy Stewardship Fund
Pacific Grove Public Library Friends and Foundation Stewardship Fund
Allan & Dolores Rosoff Family Stewardship Fund
Sol Treasures Stewardship Fund
Saint John the Baptist Building Stewardship Fund

Donor Advised

Albert R. and Patricia K. Ceresa Fund
Haynes Charitable Foundation Fund
Elke Junger Making a Difference Fund
The Graham-Freed Family Foundation Fund
Housing for Kids
Howard & Gretchen Leach Fund
McChesney Fund



(l to r) Christine Dawson, Genevieve Armendariz (Limitless Scholarship Founder) Ceci Romero and Esther Figueroa

Monterey County Children's Fund
Peregrine Fund
Pollack Family Fund
Post Ranch Inn Big Sur Community Fund
Vince Sercia Humanitarian Fund
S.F.B. Morse Conservation Award
Simon Family Fund
David Soskin Memorial Fund

Field of Interest

Mary Ann Kane Fund for Education

Scholarship and Award

Steve and Marti Diamond Scholarship Fund
The Limitless Scholarship Fund

Special Purpose/Temporary Discretionary

Monterey County Storm Relief Fund
MPRPD Transportation Grant

The Legacy Society Welcomes New Members

Jim and Jill Sleeper

The Legacy Society is a group of visionary people who have included the CFMC in their estate plans.

Legacy Society members may also choose to remain anonymous. For more information about planned giving, please contact Cecilia Romero or Christine Dawson at 831.375.9712 or visit cfmco.org/Legacy.

*Since October 2022



center for
nonprofit excellence
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Investing in Leadership

The Center for Nonprofit Excellence (CNE) invests in developing leaders and sustaining the diverse and dynamic nonprofit organizations doing critical work in our community. The LEAD Institute launched its twelfth year-long cohort with 20 rising nonprofit leaders on February 10, 2023, in Salinas.

These LEADers took time to get to know one another, celebrate leadership strengths, and identify a shared vision for growth and connection. Throughout the year ahead, this group will engage with nonprofit management skill building and leadership learning to build thriving, inclusive teams and deepen the impact of their work.

Nonprofit organizations like Interim, Inc., which provides services and affordable housing in support of community members with mental illness, have tapped into this professional development resource for 11 of its staff over the years, strengthening its internal pipeline for growth. Youth Arts



LEAD Institute 2023 gathered in February at Harden Foundation

“The conversations and discussions we’ve had are meaningful and validating.”
—Hayley Mears, 2022 LEAD Institute alumna

Collective highlighted LEAD Institute as a resource for its leadership transition process.

Through programs like LEAD Institute, CNE is making long-term investments to serve our partners and clients and make their organizations more equitable and resilient. More than 180 LEADers from 120 nonprofits have completed LEAD since it began in 2009. Meet the leaders or learn more: cfmco.org/LEAD.

Organizational Development Grants Awarded

The CNE awarded over \$100,000 in Organizational Development (OD) grants to local nonprofits in 2022 with supplemental funding from the David and Lucile Packard Foundation. These flexible Packard Funds supported creative solutions to COVID-19 pandemic disruptions.

For example, as schools returned to in-person learning, Harmony at Home’s programs helped address the crucial need for social and emotional well-being facing our youth. With support from an OD grant to strengthen its internal processes and structure, the organization reconfigured program delivery in schools to meet students’ needs and support teachers to do their best work.

From innovative programming to impactful, trust-based grantmaking, CNE is here for the Monterey County nonprofit community in a time of strengthening and rebuilding to meet our missions and uplift our values.



SIEDI

SIEDI Begins Second Year

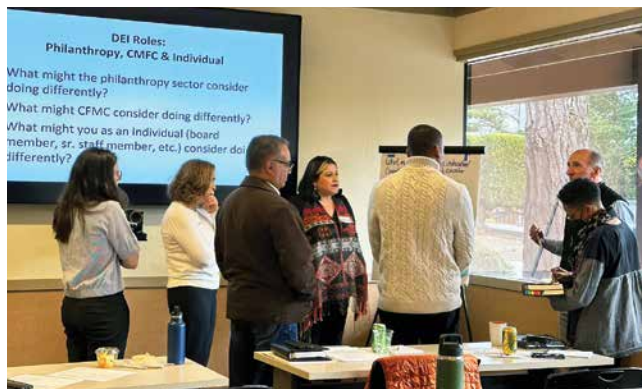
SIEDI (Salinas Inclusive Economic Development Initiative) is a collective journey by nine community-based organizations with a shared commitment to build a more inclusive and equitable economy for the families and communities of the Salinas Valley. Each organization receives continuous mentoring and operational support over three years.

SIEDI is funded by a \$3 million grant from The James Irvine Foundation in partnership with the CFMC. The grant supports inclusive recovery and economic development efforts, especially those related to the preservation and creation of quality, family-sustaining jobs in Salinas.

In 2022, each partner created individual action plans. In 2023, SIEDI will be focused on fostering new critical relationships within the business sector. Participant Jose Ortiz of Hijos del Sol sums it up this way, “We try to get people together on their similarities rather than differences. When we get together, magic happens.”

Board Focuses on Diversity, Equity & Inclusion

As part of the CFMC's commitment to diversity, equity and inclusion (DEI), the CFMC board of directors and senior staff held a full-day retreat in January focusing on these principles. Discussion topics included what the philanthropic sector could be doing differently, what the CFMC might consider doing differently, and what we as individuals could do differently to further DEI goals and principles. The retreat was facilitated by NCBI Monterey.



CFMC Board retreat explores diversity, equity and inclusion principles

If you are looking to grow personally or as a nonprofit organization, we invite you to explore resources at cfmco.org/DEI.

2023 BOARD OF DIRECTORS

Kirk Gaffill, *Chair*
Elsa Mendoza Jimenez, *Vice Chair*
Jesse Lopez, CPA, *Treasurer*
Loren Steck, *Secretary*

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Abby Taylor-Silva
Jan Vanderbilt
Jennifer Walker
Tyler Williamson

Daniel R. Baldwin
President/CEO



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CFMC Welcomes New Board Members

The Community Foundation for Monterey County is pleased to announce the addition of **Deneen Guss**, **Kathleen Lee**, **Colby Pereira** and **Julie Roth** to its Board of Directors.



Dr. Deneen Guss has been the Monterey County Superintendent of Schools since 2019. Dr. Guss is a 35-year veteran educator with a doctorate degree in Educational Leadership. She

has received numerous awards for her service, including the 2021 Ruth Vreeland Memorial Public Official of the Year award. With a lens on community and equity, Dr. Guss is focused on strengthening community engagement and improving educational outcomes for youth.



Kathleen Lee is the Executive Director of the Point Lobos Foundation. Since 2011, she has served on the Monterey Peninsula Regional Park District and worked in public policy,

including as the District Director for Rep. Jimmy Panetta. She enjoys working on issues involving open space management, fiscal stability, equity, and health benefits of nature. She holds a B.A. in Political Science and an Executive Master's degree in Public Administration.



Colby Pereira is from Soledad, California, also home of Braga Fresh Family Farms, where she is the Chief Operating Officer. Colby holds a B.S. in agricultural business with a minor in crop

science from Cal Poly, San Luis Obispo. Colby served as president to the Salinas Valley Chapter of California Women for Agriculture. She is the board president of the Monterey County Farm Bureau and serves on many other agencies.



Julie Roth, a Wealth Manager at Monterey Private Wealth (MPW), serves as Treasurer for both the Naval Postgraduate School Foundation and the Rotary Club of Pacific Grove. Julie

holds an M.S. in Financial Planning from the University of Georgia, an M.A. from the George Washington University, an M.S. from the University of Northern Colorado, and a B.S. from the University of Arizona. Julie served 20 years in the U.S. Air Force and retired as a lieutenant colonel in 2013.

Inside

Storm Relief Fund Grants More than \$1 Million
Record Monterey County Gives!
CNE Invests in Leadership
New Funds Created



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HEALTHY, SAFE, VIBRANT Communities



CFMC Philanthropic Services Officer Alisa Smith with fund holders Rosemary and Brad Tarp

Monterey County Storm Relief, continued from page 1

Hundreds of Pajaro residents have been sheltering in the evacuation center at the Santa Cruz County Fairgrounds since the levee breach March 11, when they left their homes with the clothes on their backs and few belongings. Many of Pajaro's residents are farmworkers whose household incomes have been disrupted as waters also flooded nearby agricultural fields where they worked. Small business owners, the heartbeat of the commercial economy in Pajaro, have also suffered.

Floods are unlike other disasters in that the damage to structures isn't always evident from the outside. After residents were allowed to return to their homes on March 23 to assess and begin cleaning, curbs were piled high with clothes, mattresses, furniture, appliances, discarded food, and other belongings.

“Disasters are moments when we can support one another, knowing it is making our communities stronger.”

— Dan Baldwin, CFMC President/CEO

Partner organizations with deep roots in the community are on the ground directly helping families. Community Bridges, Casa de la Cultura Center, Catholic Charities of the Diocese of Monterey and other Storm Relief Fund grantees are helping with equitable distribution of support.



Sister Rosa Dolores (l), ED of Casa de la Cultura Center, and team meet with Laurel Lee-Alexander (r)

Michael Castro and VIDA Community Health Workers at Local Assistance Center



Thanks to the VIDA (Virus Integrated Distribution of Aid) program (overseen by the CFMC in partnership with Monterey County Health Department), dozens of trusted Community Health Workers have been at evacuation centers assisting with referrals and translation.

We thank the many donors to the Monterey County Storm Relief Fund and the hardworking nonprofit staff at the community-based organizations providing relief to our neighbors. The need will continue. You can learn more, see a list of grantees or give at cfmco.org/StormRelief.

Thank you to All Within My Hands Foundation, California Wellness Foundation, Conrad N. Hilton Foundation, Driscoll's, Granite Construction, Heising-Simons Foundation, Monterey Peninsula Foundation, David and Lucile Packard Foundation, Sunlight Giving, Taylor Farms, TriCal, Inc., Vistra and all the many individuals and businesses for their support of the Monterey County Storm Relief Fund.