

A large, stylized green tree logo is centered in the background. The canopy of the tree is composed of many small, teardrop-shaped leaves. The trunk of the tree is formed by the silhouettes of three human figures standing side-by-side, with their arms raised as if holding up the canopy.

# INSPIRING PHILANTHROPY STRENGTHENING COMMUNITIES



*Here for Good*

**Community Foundation**  
for Monterey County

## TABLE OF CONTENTS

1	Message to the Community	
2-3	Strengthening Communities - Grantmaking	
4-5	Grantee Stories	
6	Creating Opportunity - Scholarships	
7	Inspiring Philanthropy - Monterey County Gives!	
8-9	Giving Local	
10	Fund for Homeless Women	
11	Culture of Generosity - Siembra Latinos Fund	
12	Philanthropic Services	
13	Making the World Better - Daphne and Stuart Wells	
14	Diversity, Equity, Inclusion	
15	Collaborating for Community Health/VIDA	
16	Community Leadership	
17	Community Impact Investment	
18	Inclusive Economic Development	
19	Center for Nonprofit Excellence	
20	Giving Options	
21	New Funds Created	
22-23	Stories of Giving	
24-25	Celebrating Philanthropy	
26	Leaving a Legacy	
27	Fund for Monterey County	
28-29	Financials and Grant Details	
30-31	Leadership - Board and Staff	
32	Gratitude - Committees and In Memoriam	
33	Partner with Us	

### 2022 FAST FACTS

**\$11.2  
MILLION**

Raised by 201 nonprofits through  
Monterey County Gives!

**\$332.8  
MILLION**  
Total Assets

**\$44.8  
MILLION**  
Gifts Received

**\$31.2  
MILLION**  
Granted

**2,277**  
Grants Awarded

**\$1.7  
MILLION**  
Awarded to  
431 Students

**50**  
New Funds  
Established

# MESSAGE TO THE COMMUNITY

Annual reports are hard to contain. They're meant to describe a specific block of time, but our work carries on in a continuum. So as 2022 swam into 2023, the theme of *Inspiring Philanthropy; Strengthening Communities* became even more relevant. Winter storms brought tremendous wind, rain and flooding, all this before the levee breached in Pajaro, Monterey County's northernmost and perhaps most economically fragile community. We're now so used to the outpouring of support in the wake of fires, the pandemic and floods, we hope we never take it for granted. Inspired philanthropy at times does more than strengthen communities; *it can help save them*.

2022 saw the Community Foundation for Monterey County continue its dynamic role of Inspiring Philanthropy and Strengthening Communities. We granted more than \$31 million across Monterey County, supporting work in education, health care, youth, the environment, human services, arts and culture. More important, these grants elevated the lives of thousands of residents.

As you'll see in this annual report, the CFMC's impact goes well beyond grantmaking. Monterey County Gives! inspired \$11.2 million in gifts that become grants. Our work with the Salinas Inclusive Economic Development Initiative (SIEDI) is equipping a cohort of community-based organizations to better advocate for themselves and their constituents in the economy. The VIDA program has trained and deployed community health workers in some of our most vulnerable communities. The COVID-19 Collaborative is now the Community Wellness Collaborative, pivoting to support community mental health. The Center for Nonprofit Excellence provides leadership training, capacity building and best practice programming to Monterey County nonprofits. Our Community Impact Investment program utilizes portfolio assets to make loans to organizations that bring financial and mission-driven returns. And there is much more.

None of our work is possible without partnerships with individuals, families and foundations. Estate planning attorneys, wealth managers, CPAs and other professional advisors recognize when the CFMC can provide philanthropic services to clients. We often work in collaboration with county and local governments.

If the Community Foundation for Monterey County is to be effective, if it is truly *Inspiring Philanthropy; Strengthening Communities*, it is because we're a reflection of a powerful philanthropic landscape that stretches from Big Sur to Castroville, Salinas to San Ardo, and all points in between.

**It is truly an honor to be your community foundation.**



Teri Belli  
2022 Chair, Board of Directors



Daniel R. Baldwin  
President/CEO



“  
**IF THE COMMUNITY  
FOUNDATION FOR  
MONTEREY COUNTY IS TO  
BE EFFECTIVE, IF IT IS TRULY  
INSPIRING PHILANTHROPY;  
STRENGTHENING  
COMMUNITIES, IT IS BECAUSE  
WE'RE A REFLECTION OF A  
POWERFUL PHILANTHROPIC  
LANDSCAPE THAT  
STRETCHES FROM BIG SUR  
TO CASTROVILLE, SALINAS  
TO SAN ARDO, AND ALL  
POINTS IN BETWEEN. IT IS  
TRULY AN HONOR TO BE YOUR  
COMMUNITY FOUNDATION.**

—  
**Teri Belli**  
CFMC Board Chair  
and  
**Dan Baldwin**  
President/CEO  
—

”







# STRENGTHENING COMMUNITIES - \$31 Million Granted

The CFMC plays an important role in strengthening communities through grantmaking. In 2022, the CFMC awarded more than \$31 million through 2,277 grants in Monterey County and beyond. The 2021 Monterey County Gives! campaign funded \$9.6 million of these grants and CFMC donor advisors directed more than \$7 million. (See grant details page 29). CFMC discretionary grants were allocated through diverse grantmaking programs, each addressing different community needs.

The CFMC awards 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.

The principles of diversity, equity and inclusion (DEI) continue to be a part of the CFMC's values and grantmaking criteria. This includes the Community Impact (CI) grantmaking program – its guidelines are continuously updated to reinforce an emphasis on racial equity. In an effort to increase access and reduce barriers, the CFMC continues to focus on increasing unrestricted operating support grants, expanding multi-year grants and continuing the Small CI grantmaking program.

Community Impact grants respond to a variety of local needs. Thanks to generous donors who supported the Fund for Monterey County (see page 27), nonprofit organizations can request grants each year for operating and programmatic support, new efforts or capacity building improvements. The Fund for Monterey County grants more than \$2 million each year.

The CFMC also carries out the wishes of donors who established field of interest funds to support a specific charitable cause or purpose. Examples include the Kathleen and Howard Marks Fund, which makes grants supporting seniors in need and animals, and the Ruth L. and Wilbur K. Amonette Fund, which supports the performing arts and education.

We are grateful to our donors, partners and nonprofit groups for their support through their commitment and ingenuity. This scale of impact is only made possible by the many people who have partnered with the CFMC over the years to help strengthen our communities.



*Partnership for Children*



*Sol Treasures*



*Regeneración*

“

THIS SCALE OF IMPACT IS ONLY MADE  
POSSIBLE BY THE MANY PEOPLE WHO HAVE  
PARTNERED WITH THE CFMC  
OVER THE YEARS.

—

Laurel Lee-Alexander

Vice President of Community Impact

—

”



# COMMUNITY IMPACT

## Grantee Stories

The CFMC's Community Impact grant program awarded 92 grants totaling \$2,156,512 in 2022. Grants are supported by gifts to the Fund for Monterey County. These are just some of the stories of how these grants help strengthen local communities. The CFMC is grateful to support the important work of our nonprofit partners.

### *Asian Cultural Experience*

#### **Asian Cultural Experience**

Asian Cultural Experience's (ACE) mission is to preserve, promote and enrich the history and multicultural identity of Salinas' Chinatown, historically the home of the local Chinese, Japanese and Filipino communities. ACE is involved in a number of community educational programs and partnerships.

Prior to moving into its office at Moon Gate Plaza in 2019, ACE had no stable base of operations; it was difficult to store and catalog historic images and objects, enlarge their membership and volunteer base, maintain consistent outreach and expand educational programs. With a \$10,000 Community Impact grant, ACE hired two new part-time staff members to help address these issues.

The new programs manager is responsible for the development and implementation of educational programs, community partnerships, volunteer management and visitor interaction; while the content writer supports educational projects, exhibits and publications.

The organization's presence, knowledge of the neighborhood, historical/cultural programs and collaboration with nonprofit neighbor organizations all help to build a stronger, positive sense of community.

#### **The Epicenter**

Youth exiting systems of care, including the foster, mental health and probation systems, often struggle to become independent, successful adults.

The Epicenter operates a youth center near downtown Salinas. Its mission is to empower at-risk and systems-involved youth ages 16-24 to flourish by connecting them to community resources that provide opportunities for equity and hope. Programs are led by youth, the majority of whom are lesbian, gay, bisexual, transgender or queer (LGBTQ), in the foster or probation system, or experiencing housing insecurity.

The Epicenter is using a \$25,000 Community Impact grant to engage youth in creating opportunities to address their education, employment, housing and wellness needs. The Epicenter's unique youth engagement model empowers each youth, integrating resources and services and working with the entire community to address the barriers youth face as they transition or leave systems of care.

The Epicenter has also expanded its LGBTQ Youth Leadership body, Peer Mentorship opportunities and Friday Night Live Program to Gonzales and Soledad. Adult and peer coaches support youth to develop and implement goals for independent and productive lives.



*The Epicenter offers peer support for youth*

[cfmco.org/RecentGrants](https://cfmco.org/RecentGrants)





*El Pájaro CDC supports economic development*

## Grantee Stories

### El Pájaro Community Development Corporation

El Pájaro Community Development Corporation (El Pájaro CDC) sees the need in our communities for better economic opportunities that give people the chance to build a business of their own, create jobs for themselves and their community and spur economic activity. Its mission is to promote community and economic development for underrepresented and underserved minority small business owners and entrepreneurs.

A two-year, \$65,000 Community Impact grant is helping the organization establish a permanent office and training room in Salinas, and improve and increase outreach and service delivery to entrepreneurs throughout the Salinas Valley in three main sectors: home-based childcare businesses, food and farming entrepreneurs and small and micro-businesses in rural areas of the Pajaro and Salinas Valleys.

In the first year of the grant, El Pájaro CDC provided 350 Monterey County residents with business development training and assistance. Additionally, the organization has worked directly with 74 business owners to access capital funding for their business.

The grant also supports the organization's micro-lending program and economic development collaborations with the City of Salinas, including the East Alisal Vibrancy Program and the development of a community kitchen incubator supporting food-based entrepreneurs.

### Spay Neuter Imperative Project

The mission of Spay Neuter Imperative Project (SNIP) is to provide low-cost mobile spay, neuter, vaccination and microchipping services to end the senseless suffering and death of animals due to overpopulation and illness. It seeks to make low-cost spay/neuter, vaccination and microchipping services widely accessible to pet owners in Monterey County.

SNIP focuses on the areas with the greatest need and largest population of low-income residents, including: Salinas/E. Salinas, Castroville, Soledad, San Lucas, Greenfield, Prunedale, Gonzales and King City. SNIP attempts to serve, but is not limited to, veterans, people living with disabilities, seniors, people living without shelter and agricultural workers, many of whom have been significantly affected by COVID-19.

Even during the depths of the pandemic, the ongoing need to spay and neuter pets/animals in these areas did not stop. Unwanted litters of kittens and puppies present financial hardship for low-income families. Many people were unable to work, making the cost of veterinary services untenable.

The \$25,000 grant serves more than 250 families and helps them do the responsible thing for their pet and their community.





# CREATING OPPORTUNITY Scholarships

Scholarship recipient Brandon Le

Brandon Le, a freshman at UCLA born and raised in Seaside, has always been fascinated by how things

work. "I'm really interested in problem solving," he told us. "Ever since I was a kid, I integrated myself into technology. I grew up liking electronics, and I always wanted to know: what's behind all that?"

Brandon enrolled in challenging computer science and mathematics courses at UCLA - discrete mathematics, intro to computer organization, and Calculus III. He spoke to us about how the CFMC College Futures Scholarship has made an impact on his life as a student.

"I heard about the Community Foundation scholarships from my college counselor, Doreen Gray," Brandon said. "The process of applying was really easy - I liked how it was accessible for people who are actually in need." With his demanding and tightly scheduled academic life, Brandon says he is really grateful for the additional support.

"Receiving the scholarship has made everything so much easier. It saves me time from having to work - I'm free to focus on my studies. The CFMC helps elevate low-income students pursuing higher education."

Brandon's passion for education is palpable. He graduated from high school already in possession of an Associate Degree from Monterey Peninsula College, and now he's adjusting well to the rigors of UCLA. "I took 13 courses per semester in high school," he told us. "I had the workload mindset already. Taking college courses in high school has helped me time-manage in college and have a strong mentality in doing my work."

In addition to his courseload, Brandon is involved in computer science organizations, including Teach LA, which teaches computer science and expands opportunities for children. "We develop websites together, and interact with the kids to give everyone a chance to code." In his free time, he enjoys designing websites from scratch. When asked if he uses website builders like WordPress or Squarespace, he recoils, laughing. "NO! Absolutely not. I do it all from scratch, using HTML, CSS, JavaScript. I think of what I want to make, and then I put all that into what I see on the screen."

After university, Brandon aspires to found his own startup or take a position with a company doing front-end development. With his passion, intellect and talent, we are sure that he will continue to achieve great things!

The CFMC is proud to support Brandon and students like him. The CFMC manages 67 named scholarship funds that were established by individuals, families and businesses who recognize the value of education and want to create opportunities for local students.

## FAST FACTS

**\$1,729,717**  
Awarded

**67**  
Scholarship  
Funds

**431**  
Students

**"I'M FREE TO FOCUS ON MY STUDIES.  
THE CFMC HELPS ELEVATE  
LOW-INCOME STUDENTS  
PURSUING HIGHER EDUCATION.**

—  
Brandon Le  
—

**"**



# INSPIRING PHILANTHROPY

## Monterey County Gives!

Monterey County Gives! raised \$11.2 million in 2022 to support 201 area nonprofits, all thanks to 7,698 donors. The annual end-of-year campaign is a unique way to inspire giving from donors of all ages and backgrounds who can discover new causes while supporting their favorite nonprofits.

This remarkable outpouring of generosity continues a trend of growth year-over-year, surpassing last year's total by \$1.5 million. The amount raised and granted through MC Gives! since 2009 now totals more than \$56 million.

Nonprofits serving Monterey County are eligible to participate each year. The campaign provides them with a high-profile way to share their work in the community and raise money to grow their impact. Generous foundations, businesses and CFMC donor advisors contribute to a matching fund, providing a partial match for gifts.

"Monterey County Gives! has become an indelible part of the philanthropic landscape," said Dan Baldwin, CFMC President/CEO, at the February 2023 check presentation ceremony over Zoom, attended by representatives from this year's participating nonprofits.

Peace of Mind Dog Rescue received an additional \$1,000 award for most donors and Monterey Peninsula Pride received a \$1,000 award for most young donors (ages 18-35). The Florence Haspel Zeve Award of \$1,000 for leadership and ingenuity in the areas of women, families, education and the arts went to Youth Orchestra Salinas. The \$2,500 Ingenuity Award was presented to AI & Friends Sunday Breakfast.

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.

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



“

**GIVES! DEMONSTRATES  
THE PHILANTHROPIC  
SPIRIT OF OUR  
COMMUNITY.**

—  
**Dan Baldwin**

”

### FAST FACTS

**\$11,191,951**  
Total Donations

**201**  
Participating  
Nonprofits

**\$56  
MILLION**  
Raised Since Launch

**7,698**  
Donors

# GIVING LOCAL

## Northern Monterey County Foundation

The Northern Monterey County Foundation (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.

Founded in 2016, the NMCF is an affiliate fund of the CFMC. It is overseen by an advisory board of local leaders who review and recommend grants according to the greatest needs in the community. In 2022, the NMCF granted \$40,000 to 12 nonprofit organizations.

Jacob's Heart Children's Cancer Support Services, which supports children with cancer and their families in Northern Monterey County, received a grant "to ensure that 80 Northern Monterey family members impacted by pediatric cancer feel safe, supported and loved, remain safe in their homes, and never miss a medical appointment," said Heidi Boynton, Executive Director.

The NMCF has built a \$290,000 endowment to fund future grants.

**2016**  
Founded

**\$200,000**  
Granted Since 2016

[cfmco.org/NMCF](https://cfmco.org/NMCF)

## Southern Monterey County Foundation

The Southern Monterey County Foundation (SMCF) made a strong local impact in 2022. An affiliate fund of the CFMC since 2014, the SMCF makes annual grants to nonprofits benefitting communities from King City to points south in Monterey County.

In 2022, the SMCF granted \$23,815 to 14 organizations. Read to Me Project (RtMP) received a grant for their home-based early literacy and reading program, which provides literacy training for underserved children and their families in three elementary schools in King City.

"RtMP gives hope to every family we touch. Preschool-aged children learn concepts that prepare them to enter school ready to learn how to read," said Mary DeGroat, Director of Development and Marketing.

The SMCF inspires giving to strengthen communities in Southern Monterey County. It is directed by an advisory board of area residents who believe in neighbors helping neighbors. The fund has a \$233,000 endowment and a goal of \$2 million to sustain long-term support.

**2014**  
Founded

**\$192,000**  
Granted Since 2014

[cfmco.org/SMCF](https://cfmco.org/SMCF)

*Jacob's Heart supports children with cancer*



*Read to Me Project promotes childhood literacy*





# Community Fund for Carmel Valley

The Community Fund for Carmel Valley (CFCV), an affiliate fund of the Community Foundation for Monterey County, is a way for residents to help Carmel Valley thrive. Since 2020, the fund has granted more than \$217,000 to nonprofit projects and programs benefiting communities in the greater Carmel Valley area from Highway 1 to Cahoon Grade.

In 2022, the CFCV granted \$22,500 to eight nonprofit organizations in areas such as education, safety, meals for families, youth camps and other community-enhancing programs. Carmel Valley Community Youth Center received a grant to support their water safety instruction program in partnership with a summer camp run by another 2022 grantee, Friends of Cachagua Children's Center. "This grant allows us to continue to provide water safety instruction to underserved youth in Cachagua and Carmel Valley," said Pool Manager Kristen Rianda and President Teresa Goldberg.

The CFCV is led by an advisory board of area residents who have a deep understanding of community needs.

[cfmco.org/CFCV](https://cfmco.org/CFCV)

# Weston Call Fund for Big Sur

The Weston Call Fund for Big Sur (WCFBS) makes annual grants to nonprofits benefitting Big Sur residents from Mal Paso Creek to the Monterey County line. The Fund has granted \$83,455 since its founding in 2018.

This special interest fund of the CFMC was founded in memory of Weston Call. The WCFBS is guided by an advisory board of community leaders. "Support from our generous donors allows us to continue the work of Weston in supporting the Big Sur community in impactful and meaningful ways," said Brian Call, Advisory Board Chair.

In 2022, the WCFBS granted \$40,000 to 10 nonprofit organizations. The Big Sur Grange received a grant to support their community engagement program, which aims to bring crucial services such as CPR classes, mobile vets, eye and hearing testing, disaster training, yoga and other programs directly to local residents at low or no cost, as well as make the Grange Hall available to local groups. "Our goal is to offer educational, historical, cultural and artistic programs for the Big Sur community," said Sharon Petrosino, Big Sur Grange Secretary.

[cfmco.org/BigSur](https://cfmco.org/BigSur)



*Friends of Cachagua Children's Center camp at Carmel Valley Community Youth Center*

## FAST FACTS

**2020**  
Founded

**\$217,000**  
Granted  
Since 2020



*The Big Sur Grange engages the Big Sur Community*

**2018**  
Founded

**\$83,455**  
Granted  
Since 2018

# FIELD OF INTEREST

## FUNDS

### FAST FACTS

**\$1.8  
MILLION**  
Granted through  
2022

**\$177,000**  
Granted to  
4 Organizations  
in 2022

**\$19,750**  
Awarded through  
9 Scholarships  
for Unhoused  
Women on the  
Monterey  
Peninsula

## Fund For Homeless Women

Celebrating its tenth anniversary in 2022, The Fund for Homeless Women (FHW) supports programs and services for women living without shelter on the Monterey Peninsula. Focusing on a particular area of giving, it is one of several field of interest funds at the CFMC.

The FHW began as a conversation between co-founders Marian Penn, a social justice activist and retired attorney, Kathy Whilden, a retired social worker, and Michael Reid, then an Episcopal priest. Spurred by a letter that he received from a homeless woman, Michael, Marian and Kathy established the fund at the CFMC in 2012.

The FHW takes a dual approach of addressing immediate needs while also investing in long-term solutions, allocating funds to help ameliorate the debilitating effects of homelessness for the more than 500 women living without shelter on the Monterey Peninsula.

"They are retired elderly who can no longer afford to buy rent or food. They are salesclerks in department stores. They are mothers who are working and need to decide between rent, food and childcare. They are college students living in their car," said volunteer leader Donna Ferraro at the tenth Anniversary Fundraiser.

With the support of donors and community members, the FHW has made a profound impact, granting more than \$1.8 million for programming and services for women living without shelter, including providing emergency assistance, temporary lodging, transportation expenses and more. Over the last decade, the Fund for Homeless Women provided early funding to help seed and leverage support for new efforts, including Gathering for Women, One Starfish Safe Parking, Casa de Noche Buena and most recently, Shuman HeartHouse.

*Mosaic design by Carrie Vonderhaar*



Did you know there are more than  
500 unaccompanied homeless women  
on the Monterey Peninsula?

They are our neighbors, our mothers, our grandmothers.

They are a mosaic of all of us.



# CULTURE OF GENEROSITY



**Siembra Latinos Fund**  
OF THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY



William Tovar

*Siembra Latinos Fund celebrated its  
5th Anniversary in 2022*

The seeds planted five years ago by the Siembra Latinos Fund (SLF) founders are growing strong. “Siembra” means “to sow” and the fund seeks to grow opportunities for the Latino Community in Monterey County. The SLF, a field of interest fund of the CFMC, builds on a culture of generosity by inspiring philanthropy by Latinos for Latinos.

Led by an advisory board of local Latino leaders, the fund celebrated its fifth anniversary in 2022 and has granted more than \$80,000 in its first five years to nonprofit organizations working to improve the quality of life for Monterey County Latinos. The goal is to grow the endowment, creating a permanent, dedicated resource to meet the changing needs of local Latinos for generations to come.

In 2022, the SLF awarded \$20,000 to five nonprofit organizations for projects and programs focusing on education, mental health and economic development including the Salinas Community Science Workshop, which received a grant for its STEM Girls program at El Sausal Middle School in Salinas.

“Girls benefit from consistent engagement in science learning and tools training, empowering them to imagine and create projects of their own,” said Curtis Gabrielson, Director. “Discovering science can have a pivotal impact on their sense of belonging within science spaces, conversations and future career pathways.”

## FAST FACTS

**\$20,000**  
Granted  
in 2022

**\$80,000**  
Granted  
Since 2017

Celebrated  
**5th**  
Anniversary

“

THE SIEMBRA LATINOS FUND IS THE  
FOUNDATION FOR OUR COMMUNITY TO  
PROSPER, GROW AND THRIVE.

—  
**Ida Lopez Chan**  
Advisory Board Co-Chair  
—

”

# ENHANCING PHILANTHROPY

## Philanthropic Services

Whether you are looking to expand your giving now, or making plans for the future, the CFMC acts as a design studio for philanthropy, providing a customized approach to suit each individual, family or business. The CFMC Philanthropic Services team meets with each donor and discusses their giving interests.

One of the most helpful services the CFMC team can provide is comparing the benefits of different giving options. To simplify their giving, many donors choose to establish donor advised funds. Donors receive a tax deduction at the time the gift is made, and recommend grants over time to benefit their favorite causes.

With a life-income gift, such as a Charitable Gift Annuity (CGA) or Charitable Remainder Trust (CRT), donors can make a gift now and receive an immediate tax deduction and income for life for themselves or a loved one/beneficiary. The Guide to Planned Giving ([cfmco.org/PlannedGiving](http://cfmco.org/PlannedGiving)) is a great resource to get started.

CFMC staff has years of experience and community knowledge. The Philanthropic Services team can arrange site visits to local nonprofits, and meet with you to explore ways to include children and grandchildren in your philanthropy, if desired.



*Christine Dawson (r), helped Reg Huston and Erica Horn transition the S.T.A.R. Foundation into a performing arts scholarship fund*

Fund holders are invited to expand their knowledge and meet one another by taking part in donor education events such as the Create Your Legacy Luncheon, Women in Finance or panels on topics such as mental wellness, CFMC investments or scholarships.

The CFMC can also work with private or family foundations and businesses to take care of any administrative burden so donors can enjoy the benefits of giving and make sure their philanthropic goals are taken care of now and in the future.

From questions about types of charitable funds to IRA Qualified Charitable Distributions, the CFMC can help guide your giving to maximize benefit for you and impact on the community. Whatever your passions and charitable goals, the CFMC is here to help enhance your philanthropy.

## Plan Your Giving

### Memorandum of Charitable Intent

The new Memorandum of Charitable Intent (MOCI) is a flexible tool to plan your giving. For fundholders, the MOCI helps plan the future of your fund. For estate gifts, donors can direct a portion of their estate to the charitable purposes they desire.

One popular choice is the Fund for Monterey County, the CFMC's grantmaking endowment, to meet ever-changing community needs. (See page 27).

Because plans and interests may change over time, you can easily update your MOCI at any time with this complimentary service. Gifts will be directed according to the most recent copy on file, creating peace of mind that your wishes will be fulfilled.



# MAKING THE WORLD BETTER

## Daphne and Stuart Wells

"She's Brooklyn, I'm Bronx," says Stuart Wells of his wife Daphne. Meeting as youth, they were "both shot by cupid's arrow" at the same time and married after their first year of graduate school. They both deeply value education, having received free college tuition in New York state schools, and later became teachers themselves, each with a 36-year career.

Daphne studied education at Brooklyn College, received her Masters Degree in Education at NYU, and became a beloved preschool teacher at a SF Bay area school. Stuart was the first in his family to attend college. He graduated with a BA in engineering at CCNY, earned an MBA and PhD from Stanford and taught at the Lucas Graduate School of Business at San Jose State University, with many courses of his own creative design.

The couple resided in Boulder Creek for many years and had a second home in Monterey, moving here full time in 2020 after the CZU fires destroyed their home. Their appreciation for education inspired them to create the Daphne and Stuart Wells Scholarship Fund at the CFMC for Monterey County students interested in pursuing careers in public service. They are growing the fund with annual IRA Qualified Charitable Distributions and included the fund as part of their estate.

The Wells have generously supported many causes throughout the years and while updating their estate plans, Daphne asked, "Why wait until we're gone? Why not give now too?" Stuart agreed, saying, "It's easier to give money away than to spend it on yourself."



*Daphne and Stuart Wells enjoy the adventure of giving*

They have a personal interest in art and music of all kinds, as well as a lifelong enjoyment of the outdoors. "We have an absolute belief that if children are exposed to arts, music and nature, it will matter," explains Stuart.

"We want to make the world better. We get to give to things we really value," says Daphne.

The pair are creating a lasting legacy by including the CFMC in their estate plans, as well as leaving their home to the CFMC, to create endowed funds designated to the causes they care about.

Daphne sums it up by saying, "It gives us peace to know the funds will be well-managed over time to meet our wishes and support organizations we value."

“

“WE REALLY FEEL GOOD ABOUT  
GIVING NOW. IT’S TRULY BETTER TO  
GIVE THAN TO RECEIVE.”

—  
Daphne and Stuart Wells  
—

”

# DIVERSITY EQUITY INCLUSION

The CFMC is committed to values of diversity, equity and inclusion (DEI). Our ongoing efforts help expand the vision of what it means for our communities to be more “healthy, safe and vibrant.”

The CFMC DEI Work Group is composed of Board and staff members and was co-facilitated in 2022 by Laurel Lee-Alexander, Vice President of Community Impact, and Adriana Melgoza, Board Member. The purpose of the Work Group is to understand how DEI has been implemented in the CFMC’s work, to collaborate with the DEI staff committee on shared goals, and to lead Board education and policy development.

The DEI Work Group shared enriching resources and facilitated meaningful discussions at Board meetings, including “6 Steps Foundations Can Take to Advance Racial Equity” and “Barriers and Opportunities for DEI on Boards.” They helped plan a full day of DEI training for the entire CFMC board and senior staff, held in January 2023.

In grantmaking, the CFMC continued to implement DEI concepts in discretionary/competitive grantmaking criteria, including the Community Impact grantmaking program guidelines, which were revised to include an emphasis on racial equity concepts and phrasing.



*CFMC staff members take part in the DEI book club*

The CFMC’s Center for Nonprofit Excellence (CNE) partnered with AFP on a conference with keynote speaker Vu Le, plus a webinar with BoardSource to inspire local groups to engage more deeply in diversity, inclusion and equity work. In its programming, CNE highlighted how times of leadership transition can be opportunities to demonstrate a nonprofit’s values around DEI, engage with inclusive practices and contribute to a next generation of leadership for Monterey County nonprofits.

Composed of staff representing each department, the CFMC’s DEI staff committee meets monthly to review ongoing projects and initiatives designed to make the CFMC an ever more welcoming, diverse, equitable and inclusive space.

In 2022, the DEI staff committee conducted an annual staff survey to measure and reveal areas for improvement, arranged an all-staff training in “Mitigating Implicit Bias” from Right to Be (see [righttobe.org](https://righttobe.org)), and held quarterly DEI book club meetings featuring relevant titles to enhance our personal growth and understanding.

“

**WE ARE SO INSPIRED AND PROUD OF  
THE WAY OUR STAFF LEARNS TOGETHER  
AND ENCOURAGES ONE ANOTHER  
IN THE IMPORTANT WORK OF DEI.**

**Laurel Lee-Alexander and Susie Polnaszek**  
CFMC DEI Staff Committee Co-Chairs

”

# COLLABORATING FOR COMMUNITY HEALTH

## Covid-19 Collaborative and VIDA



The COVID-19 Collaborative was created in 2020 in response to the COVID-19 pandemic. The CFMC brought together leaders from different sectors throughout Monterey County to ensure that Monterey County's response was swift and equitable.

As the pandemic evolved, the COVID-19 Collaborative met with key community leaders in 2022 to discuss its future. It was clear that the infrastructure and network of the Collaborative should remain intact and could adjust to meet the community's needs. This next phase will be known as The Community Wellness Collaborative and the group will focus on mental health.

The CFMC has met with mental health service providers, indirect stakeholders, and other community leaders to discuss and plan this new phase. The initiative will have an equity focus and be built around the idea that we are stronger when we come together.

The CFMC continues to co-lead the VIDA (Virus Integrated Distribution of Aid) program in coordination with the Monterey County Health Department. VIDA is an example of how successful private and governmental partnerships can be. The program expanded networks and leveraged government financial support with philanthropic funding.

Over the course of the program, VIDA has interacted with over 600,000 individuals, assisted over 250,000 people with vaccination support and administered more than 34,000 Covid-19 antigen tests. VIDA has shifted along with the pandemic by taking on additional responsibilities such as Medi-Cal application assistance, Narcan distribution and disaster response.

VIDA's success is due to the care and love the Community Health Workers (CHWs) have for their neighbors. CHWs are responsive to changing needs and truly uplift local voices, helping to make their communities stronger and healthier.

*VIDA Community Health Workers were recognized by the Monterey County Board of Supervisors for their contributions to community health*

### FAST FACTS

**115,000**

Boxes of Food  
Distributed

**50+**

Community  
Health  
Workers

**72,000**

Rapid Tests  
Distributed

**1,900+**

Units of  
Narcan  
Distributed







*The CFMC hosted a meeting for members of the COVID-19 Collaborative to plan for the future*

# COMMUNITY LEADERSHIP

Community foundations play a crucial role in supporting and strengthening communities. The CFMC provides resources, expertise and leadership to address a wide range of social, economic and other issues. As a trusted partner with a unique vantage point on the challenges facing Monterey County, the CFMC uses its ability to convene stakeholders and facilitate collaboration among diverse groups. This creates additional impact beyond grantmaking.

The COVID-19 Collaborative is a prime example of creating this impact in 2022. The CFMC leads the group working with the Health Department, local organizations and other community leaders to address the lingering fallout from the pandemic. By listening to and connecting with participants and nonprofits, the CFMC led a process to determine the next steps, which will result in the shift in 2023 to the Community Wellness Collaborative, with a focus on mental health.

CFMC staff serve on boards at the local, state and national levels. Dan Baldwin serves on the League of California Community Foundations Public Policy committee and the National Steering Committee for the Community Foundation Awareness Initiative. Laurel Lee-Alexander, Vice President of Community Impact, is Secretary of the Community Foundation National

Standards Board and Christine Dawson, Senior Vice President of Philanthropic Services, is a board member of the Association of Fundraising Professionals (AFP) Monterey Bay.

The CFMC is committed to demonstrating by example the principles of diversity, equity and inclusion. In 2022, the board/staff DEI WorkGroup explored how to express these principles throughout the organization and planned a full day board training, held in 2023. The Center for Nonprofit Excellence offers programming and resources to build the effectiveness of nonprofits and groups working to advance racial and economic equity.

Through leadership, grantmaking, advocacy, and stewardship, the CFMC plays a vital role in addressing complex challenges facing Monterey County. By working together with local organizations and leaders, we help create lasting impact and build stronger, more resilient communities.



A \$1 million CII loan helped the United Way create their Community Impact Center

# COMMUNITY IMPACT INVESTMENT

## Beyond Grantmaking

### FAST FACTS

The Community Impact Investment (CII) initiative was created in 2018 to strengthen communities through strategic investments, beyond grantmaking, in local projects. The placements of capital are intended to benefit Monterey County while bringing market or near market returns to the CFMC's Investment Portfolio. An allocation for CII is included in the CFMC's Investment Policy Statement as part of the fixed income asset class and \$3.5 million has been committed since the start of the program.

The CFMC loaned \$1 million in 2022 to the United Way Monterey County and disbursed \$326,173 from previous loans to CHISPA (Community Housing Improvement Systems and Planning Association, Inc.) and MEDA (Mission Economic Development Agency). With this \$1 million CII loan, United Way Monterey County purchased a building in Salinas City Center to create a Community Impact Center. The Impact Center offers meeting spaces and lease options for local nonprofits, and community-based organizations have already benefited by holding trainings, workshops and gatherings.

The CFMC made a \$250,000 loan to CHISPA for the Mills Ranch Apartments project in King City in 2021. In 2022, the CFMC made the final distribution of \$176,183. CHISPA anticipates that the 66-unit complex will include 43 units dedicated to people working in agriculture.

A \$150,000 loan to MEDA, through Fondo Adelante and El Pájaro CDC, provided capital to make loans to six local businesses. El Pájaro CDC also provided pre- and post-loan technical assistance to the recipients. These businesses are all minority-owned, with five owned by low-income individuals and four owned by women.

Active CII recipients from prior years include California FarmLink (\$750,000) and Accion Opportunity Fund (AOF) (\$1 million). California FarmLink's purpose is to provide flexibly structured financing to underserved and new farmers. In 2022, they provided fourteen loans to ten businesses in Monterey County, nine of which are BIPOC-owned (black, indigenous and people of color). AOF's loans primarily benefit under-resourced entrepreneurs. With CFMC's investment, AOF made six loans in 2022 totaling \$128,172 to strengthen local businesses.

**\$1  
MILLION**  
Loaned to  
United Way  
Monterey County

**\$150,000**  
Loaned to  
MEDA (for Fondo  
Adelante and  
El Pájaro CDC)

**\$176,183**  
Loaned to  
CHISPA  
(\$250,000  
Total)

**\$3.5  
MILLION**  
Total Committed  
to Five Organizations

# INCLUSIVE ECONOMIC DEVELOPMENT



## SIEDI

SIEDI (Salinas Inclusive Economic Development Initiative) is a community initiative created by the CFMC in partnership with The James Irvine Foundation. The program 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. SIEDI envisions an economy that expands opportunities for more broadly-shared prosperity, especially for those facing the greatest barriers to advancing their well-being.

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

Together these groups explore our current economy (how it functions, who it benefits and how) and discover the individual organization's ability to influence how our economy serves the interests of the families they represent. SIEDI also explores ways these organizations can work together to act on behalf of a more inclusive economy and develop an effective plan of action for the next two years.

To support these efforts, the CFMC established and strengthened partnerships with The Institute for Social Transformation at UC Santa Cruz (UCSC) as well as The Everett Program for Global Information and Social Entrepreneurship and Dr. Chris Benner. The CFMC also created an Advisory Council of experienced organizations to share their work. Communities Organized for Relational Power in Action (COPA), First 5 Monterey County, Digital Nest, Community Housing Improvement Systems and Planning Association (CHISPA) and Hartnell Community College are helping SIEDI organizations grow and succeed.



*Rancho Cielo and other groups share their progress at the December quarterly convening*

## FAST FACTS

**\$3 MILLION**  
Grant from The James  
Irvine Foundation

**9**  
Participating  
Organizations

**2-YEAR**  
Program of Grantmaking  
and Mentoring Support

“

**SIEDI HAS BEEN AN EXCITING OPPORTUNITY  
THAT ALLOWS THE ORGANIZATIONS  
INVOLVED TO DREAM AND WORK TOGETHER  
FOR A BETTER ECONOMIC FUTURE.**

—  
**Natalie Herendeen**  
Executive Director/Attorney, CCA  
—

”



# LOCAL LEADERS

## EMBRACE GROWTH AND CHANGE



**center for  
nonprofit  
excellence**

The Center for Nonprofit Excellence (CNE) brings together passionate professionals focused on organizational mission success and their own growth and development. Nonprofit employers faced challenges in 2022 including the “Great Resignation,” staff turnover and fatigue and changes in the funding landscape.

CNE was there to offer impactful workshops on key topics, consulting and coaching resources, and peer gatherings. CNE programs helped nonprofits address fair compensation strategies, discover ways to stand out when recruiting new talent and invest in new leadership growth.

Over half of respondents to our Nonprofit Survey were experiencing or anticipating an executive transition, prompting CNE to create the Guide to Leadership Transitions. CNE’s Executive Director Breakfast Roundtable provided new and veteran leaders with a dynamic peer support network to celebrate and problem solve. At the conclusion of the five-part series, 100% of participants felt confident and supported to stay in their role for another year.

“Thank you so much for putting together the ED Breakfast Roundtables and for investing in us all as leaders,” said Heidi Boynton, Executive Director, Jacob’s Heart Children’s Cancer Support Services.

Our investment in rising nonprofit leaders continued as the LEAD Institute resumed in 2022. LEAD offered a vital space for leaders hungry for the rigor and immersion of in-person learning after the isolation and disruptions of the pandemic. The cohort bonded through interactive learning and conversations about leadership values and how to build a thriving, inclusive team.

The CNE will continue to be a responsive partner during these times of ongoing change and possibility.



*Executive Director Breakfast Roundtable series connects nonprofit leaders*

“

**IT’S IMPORTANT TO  
FIND A COMMUNITY  
OF PEOPLE FACING  
SIMILAR CHALLENGES  
WHO UNDERSTAND  
WHAT YOU’RE GOING  
THROUGH.**

–

Executive Director of an  
educational nonprofit  
in their first year of  
leadership

–

”

## FAST FACTS

Celebrated  
**10 YEARS**  
as Center for  
Nonprofit Excellence

**163**  
Organizations  
Served

Created Guide to  
**LEADERSHIP  
TRANSITIONS**

# GIVING OPTIONS

## Types of Funds

The CFMC holds more than 700 funds created by generous individuals, families and businesses. The CFMC is a steward of both the charitable resources entrusted to us and each donor's philanthropic vision. Donors can choose from many types of funds to plan their giving.

### Affiliate Funds

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

### 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.

### Agency Stewardship Funds

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

### Company Funds

Businesses simplify their giving and receive tax advantages and customized support to maximize their community philanthropy.

### Designated Funds

Donors can support a designated agency or agencies over time with a permanent, protected stream of operating income.



(l to r) Sandra DeLay and Carl Magnuson of the DeLay-Magnuson Foundation Fund with Philanthropic Services Officer Alisa Smith

### Donor Advised Funds

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

### Field of Interest Funds

Donors specify a charitable area of interest and the CFMC awards grants to local nonprofit organizations.

### Private Foundation Funds

These funds offer a customized blend of administrative support plus tax advantages, increased flexibility and personalized philanthropic services.

### Scholarship & Award Funds

Donors invest in the future of local students.

### Special Purpose Funds

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

(l to r) Ventana Wilderness Alliance, Hijos del Sol, Meals on Wheels of the Salinas Valley





# NEW FUNDS CREATED

We thank those who have partnered with us in establishing these funds\*.

## Agency Endowed

Carmel Youth Center Endowment Fund  
Rancho Dos Arroyos Facilities and Maintenance Endowment Fund  
Mexican American Opportunity Foundation Fund

## Agency Stewardship

Carmel Youth Center Fund  
Community Kitchen Fund  
COPA Catalyst Fund  
The Equine Healing Collaborative Stewardship Fund  
Friends of the Pacific Grove Public Library Fund  
Friends of the Pacific Grove Public Library Youth Services Fund  
Health Projects Center Stewardship Fund  
The Herman & Helen Kasavan Stewardship Fund  
IOC/Joining Hands Benefit Shop Stewardship Fund  
Helen Johnson Endowment Fund  
Nancy J. Jones Housing Insecurity Endowment Fund  
LandWatch Legacy Stewardship Fund  
Mexican American Opportunity Foundation Fund  
Monterey College of Law Fund  
Pacific Grove Museum of Natural History Operating Reserve Fund  
Pacific Grove Public Library Friends and Foundation Stewardship Fund

Allan & Dolores Rosoff Family Stewardship Fund  
Saint John the Baptist Building Stewardship Fund  
Sol Treasures Stewardship Fund

## Donor Advised

#liveforross: A Fund for Safety Awareness and Vocational Education  
Willia and Sienna Aylaian Higher Education Fund  
Albert R. and Patricia K. Ceresa Fund  
Flip a Life Fund  
The Graham-Freed Family Foundation Fund  
Haynes Charitable Foundation Fund  
Housing for Kids  
Michael and Wendy Franscioni Fund  
Elke Junger Making a Difference Fund  
Kathy Kever Charitable Fund  
Howard & Gretchen Leach Fund  
McChesney Fund  
Men's Golf Association (MGA) at Quail Lodge Community Impact Fund  
Perry and Barbara Miller Family Foundation Fund  
Monterey County Children's Fund  
Gary and Diane Nelson Foundation Fund  
Peregrine Fund  
Pollack Family Fund  
Post Ranch Inn Big Sur Community Fund

Ridgewalker Fund  
S.F.B. Morse Conservation Award  
Shing Taylor Fund  
Simon Family Fund  
David Soskin Memorial Fund  
Vince Sercia Humanitarian Fund

## Field of Interest

Mary Ann Kane Fund for Education  
**Scholarship**  
Ausonio Family Scholarship Fund  
Boewe Bui Scholarship Fund  
Stephanie A. Byrne Scholarship Fund  
Bert P. Cutino Professional Chef Scholarship Fund  
E.G. Young Computer Science and Information Systems Scholarship Fund  
Steve and Marti Diamond Scholarship Fund  
Reg Huston S.T.A.R. Scholarship for the Performing Arts  
The Limitless Scholarship Fund  
Libby Olver Scholarship Fund  
Traven Tapson Foundation  
Daphne and Stuart Wells Public Service Scholarship Fund

## Special Purpose

The County of Monterey COVID-19 Memorial Fund  
Del Rey Oaks Basketball Court Fund  
Natural Disaster Support Scholarship Fund  
MPRPD Transportation Grant  
**Temporary Discretionary**  
Monterey County Storm Relief Fund

(l to r) Watsonville Wetlands Watch, Arts Council For Monterey County, Palenke Arts

\*Funds created January 2022 through May 2023





# STORIES OF GIVING

Each donor has a unique inspiration and vision for their fund. Whether it's a donor advised fund or scholarship, a fund for company giving or to support a certain area of interest, the stories are as unique as the people that create them.

## Limitless Scholarship Fund

The Limitless Scholarship Fund was created to support the goals of women and girls in Monterey County who dream of pursuing a career in male-dominated industries but have limited access to resources due to a lack of financial support and career guidance.

Founded by Genevieve Armendariz, The Limitless Mentorship and Scholarship Program also provides mentorship workshops, career guidance and self-care products to young women and girls from low-income households.

Genevieve worked with the CFMC to create the scholarship fund. She was inspired by her grandmother, Jaycee Echeverria, who was a mechanic for the City of Salinas. Seeking to lessen the inequity where one part of the county's residents lack resources while the other part of the county is overly abundant in them, the fund seeks to lift up low-income women and empower them to pursue their dreams.

Genevieve states, "We believe there should be no barriers that limit people from achieving the greatness they are destined for."

[cfmco.org/limitless](https://cfmco.org/limitless)

## #liveforross:

A Fund for Safety Awareness and Vocational Education

Rosemary and Brad Tarp founded #liveforross: A Fund for Safety Awareness and Vocational Education in memory of their late grandson, Ross Tarp Braasch. The fund celebrates Ross's memory by supporting Welding and Ag Mechanics vocational education programs and messaging that promotes safety and good decisions.

Thanks to a grant from the #liveforross fund, Rosemary and her longtime friend Pat Heyne visited the Soledad Police Department in summer 2022 to donate motorcycle helmets for local youth. Explaining why they chose this particular safety gear, Pat noted, "Helmets can make all the difference in the world." Rosemary added: "I don't want other families to be impacted in such a painful way."

Deputy Chief Lombardi said that officers would be "looking out for families who do not have helmets or have outdated safety gear. As first responders, our goal is to make sure they don't get into an accident."

The fund also supports vocational education through safety awards to graduates of Welding and/or Ag Mechanics through Mission Fields Regional Occupational Program or Rancho Cielo Youth Campus for safety gear needed to enter the workforce in these fields.

[cfmco.org/liveforross](https://cfmco.org/liveforross)

Left: (l to r) Christine Dawson, Genevieve Armendariz, Esther Figueroa and Cecilia Romero celebrate new scholarship fund  
Right: Alisa Smith, Rosemary Tarp and Pat Heyne deliver helmets to Soledad Police Department for local youth



Giving through the CFMC is not limited to individuals and families. Local nonprofits can create endowed and stewardship funds and local businesses can partner with the CFMC to give back to their communities.

## Equine Healing Collaborative

The Equine Healing Collaborative (EHC) is making a profound impact on mental health services in Monterey County. With a belief that everyone should have access to mental health support regardless of socioeconomic status, EHC's mission is to provide mental health assistance to all individuals in need, with a special focus on underserved communities. Through its unique approach of providing Equine Assisted Psychotherapy (EAP) with rescued horses and donkeys and licensed therapists, EHC has been able to create a powerful connection between human healing and equine recovery. EHC provides services such as group psychotherapy in the surf in partnership with the Wahine Project; group retreats for veterans and first responders; individual therapy for survivors of sex trafficking; retreats for school district employees and students; and more.

EHC established a Stewardship Fund at the CFMC to support their work and ensure the sustainability of their therapy herd and services, serving as an investment in the organization's current operations and future development. Donations contribute to the care provided to both the therapy herd and to clients, ultimately enhancing the well-being of the entire community.

[cfmco.org/EquineHealing](https://cfmco.org/EquineHealing)

## Carmel Cares Stewardship Fund

The mission of Carmel Cares is to develop and support projects and programs that keep Carmel-by-the-Sea a beautiful, safe, and inviting place. Volunteers are committed to making sure that Carmel Beach, Scenic Pathway, Forest Theater, and other important public spaces are maintained in pristine condition. Carmel Cares is also dedicated to community engagement, partnering closely with the City of Carmel's Public Works Department and other nonprofit organizations to make a difference.

Starting as a virtual organization in 2018 to make the Village safer, Carmel Cares shifted focus when COVID-19 hit in 2020 to help maintain the beauty of the town in response to budget cuts and became a 501(c)3 nonprofit later that year. They partnered with the CFMC to create the Carmel Cares Stewardship Fund to support their efforts which include landscape and physical asset restoration and maintenance, eliminating litter, creating custom structures and other activities which enhance and protect this special Village.

"We are grateful to partner with the Community Foundation to make a positive difference in Carmel and create a beautiful place for all to enjoy now and in the future," said Dale Byrne, President and Chief Caring Officer, Carmel Cares.

[cfmco.org/CarmelCares](https://cfmco.org/CarmelCares)

*Left: Equine Healing Collaborative creates powerful connections between people and rescued horses and donkeys  
Right: Carmel Cares Pick Up Posse volunteers clean up the Scenic Pathway*









# CELEBRATING PHILANTHROPY

The annual Celebration of Philanthropy thanks CFMC's fund holders, legacy society members and closest supporters. Held October 5, 2022 at The Club at Pasadera, the gathering brought together more than 250 friends of the foundation to celebrate the power of local philanthropy.

Each year the CFMC board recognizes an individual or couple who has demonstrated philanthropic leadership in our region. The 2022 Distinguished Trustee Award was presented to Bruce and Linda Taylor.

Bruce and Linda bring "Give Where You Live" to an entirely new level. The Taylors' success was built on their deep sense of place, and they have humbly shared that success with others. Wherever there is a need, from King City to the Salinas Valley to Monterey Bay, there they are.

Their giving supports health and wellness, youth development and education. They have made a major pledge to the Blue Zones Wellness Project to unite communities and make healthy choices easier. They created the Taylor Farms Health & Wellness Center in Gonzales to bring access to rural communities with an emphasis on prevention.

The Taylors contribute to youth organizations including Boys & Girls Clubs of Monterey County, Digital Nest, First Tee Monterey County and the Rancho Cielo Youth Campus, where they, along with Joanne Taylor, Bruce's mother, helped fund the Rancho Cielo Ted Taylor Vocational Center.



*Bruce and Linda Taylor received the 2022 Distinguished Trustee Award (l to r) Dan Baldwin, Teri Belli, Linda Taylor, Bruce Taylor, Angela Diaz, Christine Dawson*

Creating opportunity through education is another cornerstone of their generous giving. The Taylors made a significant gift to Hartnell College for the Willard Lewallen STEM Center, which they chose to name in the former MPC President's honor. At CSU Monterey Bay, Taylor Farms is helping establish the Monterey Institute for English Learners as well as making a lead gift to kickstart the Mechatronics Engineering degree in the College of Science.

For the last several years, the CFMC has been honored to partner with the Taylors through the Taylor Farms Scholarship Program for full-time employees and their children. They've awarded \$3.1 million in four-year scholarships to create opportunity and access to education for 216 students. Scholarship recipient Angela Diaz spoke about the impact of the scholarship, saying, "Thanks to this scholarship, I will be able to achieve my goal of becoming an agronomist one day in the future, and make my family proud."

The Taylors truly lead by example. Without their support, Monterey County, and especially Salinas, would look like an entirely different place.

“

AT THE END OF THE DAY,  
IT IS THE COMMUNITY THAT CREATES  
OUR SENSE OF PLACE, WHICH GIVES US  
THE MOTIVATION AND WILLINGNESS TO  
HELP OTHERS SUCCEED.

—  
Bruce and Linda Taylor  
—

”

# LEAVING A LEGACY

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

## Legacy Society Members

Anonymous (8) Mrs. Wilber K. Amonette*	John and Gail Delorey Steve and Sona Dennis	Joseph and Elizabeth Heston	Pam and Gifford Lehman	John and Tama Olver Charles Olvis and Miranda Morris	David and Maryanne Spradling
Tonya and Rick* Antle	Martin Dodd*	Carol and Don Hilburn	Jennifer Levey	Mike and Mary Orradre	Elizabeth Stacey and Wayne Peter Marien
Yvonne A. Ascher and Leonard Laub	Meg Donat	Peter Hiller and Celeste Williams	Jack and Angeleke Levy	Richard Ruh and Wendy Palmer	Jean Stallings
Nancy Ausonio	Natasha M. Doner	Jeffrey and Amanda Holder	David S. and Norma Lewis*	Nicholas M. and Nicollette Pasculli	Loren Steck and Annette Yee Steck
Tony Ayres	Dr. William Donovan	Beverly D. Holloway	Esther H. Lindsey*	Ken Petersen	Richard Hobley and Deborah Steel
Daniel R. Baldwin and Anne Ylvisaker	William and Nancy Doolittle	Tom Hopkins	Robert H. Lindsey	John Phillips* and June Dunbar Phillips	Tom Sweeney Lawrence A.
Robert P. Balles	Julie Drezner	Robert and Millie House	Janette Loomis	Gregory A. and Winoma Plaskett	Tartaglino
Nancy L. Bartell	Jean Duff	Chris and Toulia Hubbard	Todd Lueders	Judy Sulsona and Bill Rawson	Robert and Leslie Taylor
Peggy Downes Baskin	Stephen Eimer and Kevin Ann Cartwright	Kip and Jay Hudson	Valera W. Lyles	Rex* and Joan Reade	Fredrick W. Terman and Nan Borreson
Nancy Bletzer*	Frances H. Elgan*	Vince Huth	Tom and Kathy Macdonald	Donna Hart Reid	Shirley Thackara*
Lisa Bennett and Robin White	Bertie Bialek Elliott	Gloria and Michael Ipson	John and Ann Mahoney	Eugene and Maya Rizzo	Michael and Cindy Lee Thatcher
John B. Bergin*	Norma Esselstyn	Dee Irvine	Jan and Tannie Mandel*	Michael Reid and Bill Robnett	Brian Thayer Peter and Anne*
Paul P. Bianchi	Catherine Kobrinsky Evans	Jack Jewett	Roger and Carolann Manley	Paul Rochester*	Thorp
James W. Bogart	Lowell I. Figen*	Craig and Christine Johnson	Michael and Tobi Marcus	Lee and Shirley Rosen	Vincent and Evelyn Torras*
Thomas Bohnen	Cyrus and Jean Fittin*	Mark and Susan Johnson	Joseph A. and Sheila Mark	Jean Rudolph*	William H. and Susanne S. Tyler, III
Stephen and Barbara Brooks	Anne R. Fitzpatrick	Joanne Taylor Johnson	Dr. William McAfee*	trustee, The Loralie Irvine Foundation	Patricia Tynan- Chapman
Jay and Ann Brown	Sandra Forman	Colburn and Alana Jones	Jan McAlister	James C. Sanders*	William Umeki
Joseph and Betty Chaffers*	Crawford E.* and Linda P. Foy	Joanne K. Juarez	Sherrie McCullough	John C. Sanders	James R. Valentine*
Mishka Chudilowsky and Henry Azama	Susie* and Charly Franklin	Karen Judkins and Steven Wade	Terry A. McHenry and Joan Smith	Kenneth C. Schley*	Jan Vanderbilt
Mary J. Clapper*	Joan M. Franz	Deborah Juran	McHenry	Steven Paul Schmidt	Robin Venuti and Joseph* Rock
Jim and Marie Colbert	Allen Fuhs*	Karen D. Kadushin	Thomas D. Melville	Maria Salazar Segovia	Arlene Wall
Arthur Connell*	John and Laura Gamble	William and Cheryl Kampe	Lenore Meyer*	Carol Shade*	Daphne and Stuart Wells
Julie Conrad	Joel S. and Dena Gambord	Mary Ann Kane*	Malcolm* and Joanne Millard	JeriAnn Shapiro	Jacqueline Wendland
Joyce Blevins and Katherine M. Coopman	James and Jeri Gattis	Rick and Martha Kennifer	James and Barbara Miller*	Connie Shelstad	Benjamin and Mary Ann Whitten
Julie A. Cason and Lisa K. Crawley	Donald* and Frances Gaver	Capt. Steven D. Kesselring and Jean M. Forrest	Patricia Monahan	Robert B. Sheppard*	Nels P. and Jill Wiegand
Leland and Gloria Dake*	Kevin Gilman	Alice V. Kinsler	Sidney Morris	Mimi Sheridan	Martin R. Wolf
Robert N. Danzinger* and Martha Drexler Lynn	Lupe Gomez*	Mary Koch	Leslie Mulford	Janet L. Shing	Kenneth and Mary Wright
Margaret D'Arrigo- Martin	Rodney Guiffoil*	Barbara Paul and Tom LaFaille	Tony and Lary Muller	The Simon Family	Richard Zahm*
Larry Davidson and Beverly* Dekker- Davidson	Terry Haber*	Paul Lawrence* and Marion Buccafurni	Alec and Kim Murdock	Laura Sinks	
Wallace F. and Lucille Davis*	Bernard E. Hanly	Douglas C. Lee	David M. Nee	Mary Skipwith	
Christine Dawson	Ruth Hartmann*	Laurel Lee-Alexander	Gary O. and Diane Nelson	Sidney Sue Slade	
	Peter C. Hatton		Vicki Nelson	Jim and Jill Sleeper	
	Virginia O. Hawes		Diane R. Nonella	Madison Smith*	
	Dick Hawkinson*		F. Robert Nunes*	Pamela D. Smith*	
	Thomas Hawley		Dan O'Brien	Charles and Leslie Snorf*	
	Holly and Jeff Haynes		Alfred P. Oliverio	George Somero and Amy Anderson	
	Peter* and Jacqueline Henning				

\*In Memoriam

## Legacy Society

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)

Please contact Christine Dawson or Ceci Romero at 831.375.9712. We would be honored to assist you.

# RESPONSIVE PHILANTHROPY

## Fund for Monterey County

The Fund for Monterey County (FFMC) creates philanthropic resources to meet changing needs now and in the future. The FFMC consists of endowed unrestricted and field of interest funds that are invested to grow over time.

The FFMC grants more than \$2 million each year in a wide variety of areas, including: Children and Youth Development, Health and Human Services, Community Development, Arts, Culture and Historic Preservation, and the Environment and Animal Welfare.

Grants are reviewed and allocated through the Community Impact grant program, which addresses the greatest challenges in our county. The Fund also provides flexible resources for emerging needs, such as the COVID-19 pandemic response, and provides relief and recovery grants for disaster, such as wildfires and, most recently, the 2023 winter storms and flooding.

### How it Works

- Your gift provides the philanthropic resources to meet current and future challenges.
- You can designate the Fund for Monterey County as a beneficiary of your will or trust. We can help you or your attorney with sample bequest language.
- You can give directly to the Fund for Monterey County or name the Fund as the beneficiary of your donor advised fund.
- Your gift creates a source of community capital, helping to do good work for generations to come.

You can support the Fund for Monterey County in many ways. You can make an outright gift, donate appreciated stock, make a grant from a donor advised fund or direct an IRA Qualified Charitable Distribution. Other options include life income gifts such as a Charitable Remainder Trusts or Charitable Gift Annuities.

We are grateful for all those who have invested in the future of Monterey County by including the fund in their giving plans. No matter what the future holds, the Fund for Monterey County will be here to provide support for our community.



*Big Sur Park School*

“

**I INCLUDED THE FUND FOR  
MONTEREY COUNTY IN MY  
GIVING BECAUSE I FEEL  
GOOD KNOWING THE FUND  
WILL MEET THE NEEDS OF  
OUR COMMUNITY, EVEN AS  
THEY CHANGE OVER TIME.**

—

**Bertie Elliott**

CFMC Fund holder and Legacy  
Society Member

”



# 2022 FINANCIALS

## COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2022

<b>Additions</b>	
Contributions*	\$29,189,898
Other income	829,464
<b>Total revenues and support</b>	<b>30,019,362</b>
Investment loss	(42,383,761)
<b>Grants and expenses</b>	
Grants*	28,774,715
Other operating expenses	5,132,030
<b>Total grants and expenses</b>	<b>33,906,745</b>
Decrease in net assets	(46,271,144)
<b>Net assets</b>	
Beginning of year	303,210,221
<b>End of Year</b>	<b>256,939,077</b>

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

## CONSOLIDATED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2022

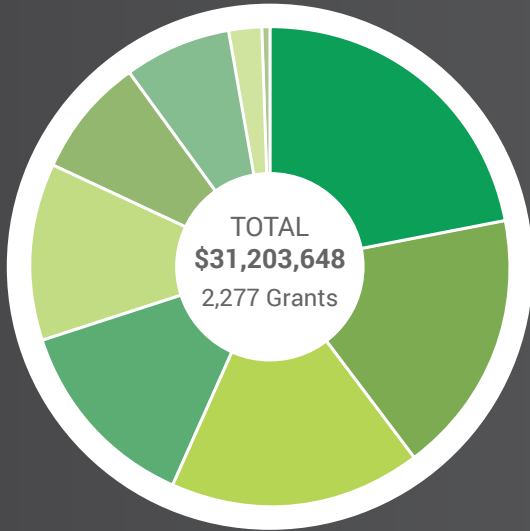
<b>Assets</b>	
Cash and equivalents	\$25,358,903
Contributions receivable	33,907
Other assets	10,610
Property and equipment, net	1,810,196
Investments, carried at market value: Mutual funds and equities	268,377,545
Cash and money market funds	13,968,914
Right-of-use asset, net	147,463
Charitable gift annuities	4,132,006
Beneficial interest in remainder trusts administered by other trustees	791,765
Investments held in charitable remainder trusts	17,330,744
<b>Total assets</b>	<b>331,962,053</b>
<b>Liabilities and net assets</b>	
Grants payable	2,394,853
Accounts payable and accrued expenses	209,385
Lease Liability	149,632
Liabilities under split-interest agreements and charitable remainder trusts	12,794,840
Funds held for others	59,474,265
<b>Total liabilities</b>	<b>75,022,976</b>
<b>Total net assets</b>	<b>\$256,939,077</b>

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.



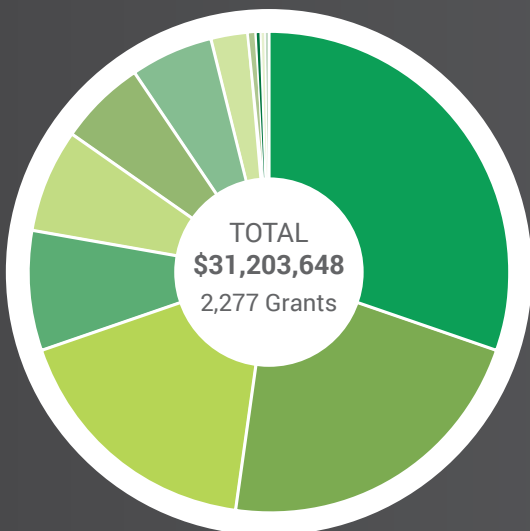
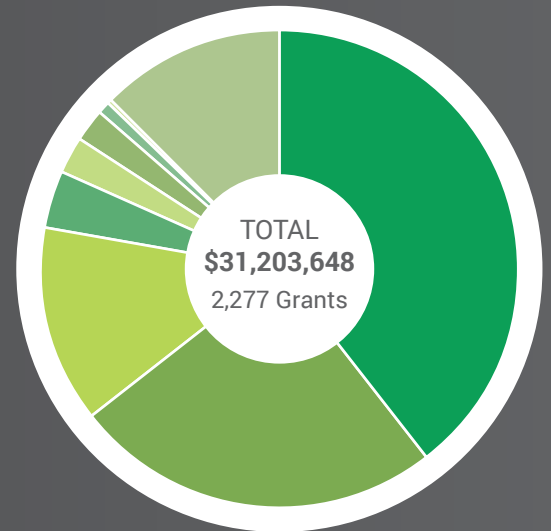
# GRANT DETAILS



GRANTS BY PROGRAM AREA	AMOUNT	# GRANTS
Human Services	\$6,916,725	490
Health	5,521,636	222
Education	5,326,235	712
Public/Community Benefit	4,084,587	202
Arts and Culture	3,725,631	291
Environment	2,579,824	203
Animal Welfare	2,210,400	65
Religion related	705,569	58
International & Foreign Affairs	133,042	34
<b>TOTAL</b>	<b>\$31,203,648</b>	<b>2,277</b>

## GRANTS BY REGION

	AMOUNT	# GRANTS
Countywide	\$12,404,450	535
Monterey Peninsula	7,892,720	483
Salinas/Salinas Valley	4,051,136	259
Big Sur Area	1,159,715	46
Castroville & North	772,166	60
Multiple Areas	666,921	33
King City & South	256,975	28
Carmel Valley Area	135,091	19
Outside Monterey County	3,864,474	814
<b>TOTAL</b>	<b>\$31,203,648</b>	<b>2,277</b>



GRANTS BY TYPE	AMOUNT	# GRANTS
MC Gives Campaign	\$9,506,941	185
Donor Advised	6,874,612	1,162
Restricted Fund	5,451,845	210
Special Project	2,456,724	33
Community Impact	2,161,512	93
Discretionary	1,829,259	31
Scholarships & Awards	1,730,582	416
Field of Interest	798,090	35
Affiliate Fund	126,315	44
Pass Thru/Temporary	105,350	40
Organized Development	103,468	14
Opportunity & Neighborhood	58,950	14
<b>TOTAL</b>	<b>\$31,203,648</b>	<b>2,277</b>



# LEADERSHIP

## 2023 BOARD OF DIRECTORS

### **Kirk Gafill (Chair)**

President/Chief Financial Officer  
Nepenthe/Phoenix Corporation

### **Elsa Mendoza Jimenez (Vice Chair)**

Director of Health Services  
Monterey County Health  
Department

### **Jesse Lopez (Treasurer)**

CPA, Managing Partner  
Bianchi, Kasavan & Pope, LLP

### **Loren Steck (Secretary)**

Entertainment Industry Consultant

### **Deneen Guss**

Monterey County Superintendent  
of Schools

### **Romero Jalomo**

Vice President of Student Affairs  
Hartnell College

### **Kathleen Lee**

Executive Director  
Point Lobos Foundation

### **Giff Lehman**

Founding Partner  
Integrus Wealth Management  
(Retired)

### **Adriana Melgoza**

Familias Con Mas Director  
Ventures

### **René L. Mendez**

City Manager  
City of Watsonville

### **Larry Oda**

Community Volunteer  
Former JACL National President

### **Colby Pereira**

Chief Operating Officer  
Braga Fresh Family Farms

### **Joe Pezzini**

Senior Director of Ag Operations  
Taylor Farms

### **Francine Rodd**

Executive Director  
First 5 Monterey County

### **Julie Roth**

Wealth Manager  
Monterey Private Wealth

### **Abby Taylor-Silva**

Executive Vice President  
California Agricultural Leadership  
Foundation

### **Jan Vanderbilt**

President  
Vanderbilt CPAs PC

### **Jennifer Walker**

Attorney and Shareholder  
Leach & Walker, a Professional  
Corporation

### **Tyler Williamson**

Monterey City Mayor

*We thank those board members whose terms ended in 2022 for their years of dedicated service.*

### **Teri Belli**

### **Judy Guzmán Krueger**

### **Nolan Kennedy**

### **Fred Meurer**

### **Betsey Pearson**





*Standing (l to r) Dan Baldwin, Joel Hernandez Laguna, Daniel Faith, Susie Polnaszek, Alisa Smith, Jasmine Menor, Reid Norris, Jessica Alcantar-Tinajero, Sarah Elias, Michael Castro, Esther Figueroa, Jakie Marquez, Chalet Booker, Clarisa Collins, Brian Thayer, Gianna Yim, Jane Albertson, Cecilia Romero, Karina Gutierrez-Barboza, Amanda Holder / Seated (l to r) Kim Drabner, Laurel Lee-Alexander, Christine Dawson, Maria Hauman, Janet Shing*

## 2023 STAFF

### **Jane Albertson**

Communications Officer

### **Jessica Alcantar-Tinajero**

Grants and Office Coordinator

### **Dan Baldwin**

President/CEO

### **Chalet Booker**

Administrative Specialist

### **Michael Castro**

Director of Community Initiatives and Partnerships

### **Clarisa Collins**

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

### **Jakie Marquez**

Philanthropic Services and Scholarships Assistant

### **Jasmine Menor**

Philanthropic Services Coordinator

### **Reid Norris**

Center for Nonprofit Excellence Leadership Development Specialist

### **Susie Polnaszek**

Director of Center for Nonprofit Excellence

### **Cecilia Romero**

Director of Gift Planning

### **Janet Shing**

Director of Grantmaking

### **Alisa Smith**

Philanthropic Services Officer

### **Brian Thayer**

Senior Philanthropic Services Officer

### **Gianna Yim**

Accountant

# GRATITUDE

## 2022 Board Committees

### Executive Committee

Teri Belli (Chair), Kirk Gafill, Nolan Kennedy, Giff Lehman, Adriana Melgoza, Betsey Pearson, Loren Steck, Jan Vanderbilt

### Audit Committee

Loren Steck (Chair), Teri Belli, Judy Guzmán Krueger, Jan Vanderbilt

### Community Impact

Adriana Melgoza (Chair), Teri Belli, Romero Jalomo, Judy Guzmán Krueger, Rene Mendez, Francine Rodd

### Community Impact Investment

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

### Diversity Equity Inclusion Work Group

Adriana Melgoza (Co-chair), Laurel Lee-Alexander (Co-chair), Teri Belli, Clarisa Collins, Elsa Mendoza Jimenez, Joel Hernandez Laguna,

Susie Polnaszek  
Francine Rodd, Abby Taylor-Silva

### Endowment Stewardship

Betsey Pearson (Chair), Teri Belli, Greg Chilton, Elsa Mendoza Jimenez, Jennifer Walker

### Finance

Jan Vanderbilt (Chair), Teri Belli, Kirk Gafill, Jesse Lopez, Fred Meurer, Joe Pezzini, Abby Taylor-Silva, David Warner

### Governance

Elsa Mendoza Jimenez (Chair), Teri Belli, Kirk Gafill, Judy Guzmán Krueger, Fred Meurer

### Investment

Giff Lehman (Chair), David Benjamin, Teri Belli, Bill Doolittle, Craig Johnson, Nolan Kennedy, Bill Sharpe, Loren Steck

### Philanthropic Services

Betsey Pearson (Chair), Teri Belli, Larry Oda, Joe Pezzini, Hansen Reed, Abby Taylor-Silva, Jennifer Walker

## 2022 Advisory Committees

### Community Impact Grant

Romero Jalomo (Co-chair), Francine Rodd, (Co-chair), Betsy Buchalter Adler, Celia Barberena, Ida Lopez Chan, Kathie Cain, Meg Clovis, Laura Gamble, Samuel "Sandy" Hale, Peter Hiller, John Scourkes, Celeste Williams, Lorraine Yglesias

### Community Fund for Carmel Valley

Alan Crockett (Chair), John Aliotti, Tess Arthur, Anthony Belleci, Nick Craft, Joseph Hertlein, Jessica Kent, Alondra Klemek, Tammi Lyon, Peter Meckel, Anne-Marie Rosen, Michelle Slade

### Northern Monterey County Foundation

Chuck Allen (Chair), Glen Alameda, Lance Batistich, Ricky Cabrera, Don Chapin, Kathy Genasci, Anne Herendeen, Nick Kambic, Karen Miller, John Phillips,

Brian Smith, Abby Taylor-Silva  
**Scholarships**  
Betsy Buchalter Adler, Bibiana Hernandez Alcala, Javier Andrade, Celia Barberena, Liane Ishii Devine, Susan Galvin, Daniel Gonzalez, Krista Hanni, Peter Hiller, Berniz House, Felicia Perez Kausin, Di Lam, Julianne Leavy, Angeleke Levy, Rudy Medina, Teresa Nieves, Nettie Porter, Monica Rico

### Siembra Latinos Fund Advisory Board

Ida López Chan (Co-chair), Lorraine Yglesias-Rice (Co-chair), Alexis Arrazola, Jose Arreola, Chris Barrera, Patricia K. Cruz, Louie (Luis) Diaz-Infante, Elsa Mendoza Jimenez, Lluvia del Rio, Martha Zepeda

### Southern Monterey County Foundation Advisory Board

Oscar Avalos (Chair), Linda Benway, Grace Borzini, Ryan Casey, Robert Cullen, Michel Hardoy, Jamie Jones, Erin King, Mikel Ann

Miller, Tom Shepherd, Abby Taylor-Silva, Teri Umbarger, Carlos Victoria

### Robert and Virginia Stanton Endowment Committee

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

### Weston Call Fund for Big Sur

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

### Women's Leadership Advisory Council

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

## In Memoriam



**Christine Armanasco**  
Friend of the Foundation



**Jeanne Holmquist**  
Fund holder  
Legacy Society Member



**Leslie Snorf**  
Fund holder



**Sarah Bonner**  
Former CFMC Board member



**Barbara Keith**  
Fund holder



**Mark Verbonich**  
Former CFMC Board member



**Beverly Dekker-Davidson**  
Fund holder  
Legacy Society Member



**Amjad Noorani**  
Fund holder



**Jeanette White**  
Fund holder



# CONNECT

## PARTNER WITH US

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

## START A FUND - It's simple:

### 1 CREATE

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

### 2 CHOOSE

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

### 3 GIVE

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

## Thank You!

Our accomplishments are only made possible through your support.



**Monterey Office**  
2354 Garden Road  
Monterey, CA 93940  
831.375.9712

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



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



Chris Burnham

## OUR VALUES

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

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

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

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

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

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

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





2354 Garden Road, Monterey, CA 93940 • [cfmco.org](http://cfmco.org)

# HEALTHY, SAFE, VIBRANT COMMUNITIES