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
From top l to r: Youth Orchestra Salinas (YOSAL), Tatum’s Garden, CNE’s Reid Norris and Max Gomez, Palenke Arts, VIDA, Olinga Learning/Internm, Inc., SIEDI convening
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.

“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”

cfmco.org/Grants
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’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
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.
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 course load, 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

cfmco.org/Scholarships
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 Al & 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, Cohnen and Alana Jones Foundation of the CFMC, the David and Lucile Packard Foundation, the Cannery Row Company and CFMC donor advisors.

“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

cfmco.org/MCGives
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.

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.

GIVING LOCAL

2016 Founded

2014 Founded

$200,000 Granted Since 2016

$192,000 Granted Since 2014

cfmco.org/NMCF

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

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
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.

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.
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

cfmco.org/Siembra
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) 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.

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.

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

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
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.

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), 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
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.
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.

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

cfmco.org/Covid19Collaborative
COMMUNITY IMPACT INVESTMENT
Beyond Grantmaking

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.

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

**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

[cfmco.org/SIEDI](http://cfmco.org/SIEDI)
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

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.
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.

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

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

cfmco.org/FundTypes
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

**Donor Advised**
- Allan & Dolores Rosoff Family Stewardship Fund
- Saint John the Baptist Building Stewardship Fund
- Sol Treasures Stewardship Fund
- #liveforross: A Fund for Safety Awareness and Vocational Education
- Willa 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

**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
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.”

#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.
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.

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.
Top to bottom: Southern Monterey County Foundation fundraiser, Dan Baldwin, Community Fund for Carmel Valley event, Women's Fund gathering, Siembra Latinos Fund Anniversary, Northern Monterey County Foundation reception
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.

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
Tonya and Rick* Antle
Yvonne A. Ascher and
Leonard Laub
Nancy Ausonio
Robert P. Balles
Daniel R. Baldwin and
Tony Ayres
Nancy L. Bartell
Peggy Downes
Baskin
Nancy Bletzer*
Lisa Bennett and
Peggy Downes
John and Gail Delorey
Steve and Sons
Dennis
Martin Dodd*
Meg Donat
Natalisha M. Doner
Dr. William Donovan
William and Nancy
Doolittle
Julie Drezner
Jean Duff
Stephan Eimer and
Kevin Ann
Cartwright
Frances H. Elgan*
Bertie Bialek Elliott
Norma Ebselstyn
Catherine Kobrinsky
Evan
Lowell J. Figen*
Cyrus and Jean
Fitton*
Anne R. Fitzpatrick
Sandra Forman
Crawford E.* and
Linda P. Forman
Susie* and Charly
Franklin
Joan M. Franz
Allen Fuhs*
John and Laura
Gamble
Joel S. and Dena
Gambord
James and Jeri Gattis
Donald* and Frances
Gaver
Kevin Gilman
Lupe Gomez*
Rodney Guilfoil*
Terry Haber*
Bernard E. Hanly
Ruth Hartmann*
Peter C. Hatton
Virginia O. Hawes
Dick Hawkins*
Thomas Hawley
Holly and Jeff Haynes
Peter* and Jacqueline
Henning
Joseph and Elizabeth
Heston
Carol and Don Hilburn
Peter Hillier and
Celeste Williams
Jeffrey and Amanda
Holder
Beverly D. Holloway
Jeanne S. Holmquist*
Tom Hopkins
Robert and Millie
House
Chris and Toula
Hubbard
Kip and Jay Hudson
Vince Huth
Gloria and Michael
Ipsen
Dee Irvine
Jack Jewett
Craig and Christine
Johnson
Mark and Susan
Johnson
Joanne Taylor
Johnston
Colburn and Alana
Jones
Joanne K. Juarez
Karen Judkins and
Steven Wade
Deborah Juran
Karen D. Kudashin
William and Cheryl
Kampe
Mary Ann Kane*
Rick and Martha
Kennyfer
Capt. Steven D.
Kesseling and
Jean M. Forest
Alice V. Kinsler
Mary Koch
Barbara Paul and
Tom LaFaille
Paul Lawrence* and
Marion Buccafurini
Douglas C. Lee
Laurel Lee-Alexander
Pam and Gifford
Lehman
Jennifer Levey
Jay and Angeleke
Levy
David S. and Noma
Lewis*
Esther H. Lindsey*
Robert H. Lindsey
Janette Loomis
Todd Lueders
Valera W. Lyles
Tom and Kathy
Macdonald
John and Ann
Mahoney
Jan and Tannio
Mandel*
Roger and Carolann
Manley
Michael and Tobi
Marcus
Joseph A. and Sheila
Mark
Dr. William McAfee*
Jan McAlister
Sherrie McCullough
Terry A. McHenry
and Joan Smith
McHenry
Thomas D. Melville
Lenore Meyer*
Malcolm* and Joanne
Millard
James and Barbara
Miller*
Patricia Monahan
Sidney Morris
Leslie Mulford
Tony and Larry Muller
Alec and Kim
Murdoc
David M. Nee
Gary O. and Diane
Nelson
Vicki Nelson
Diane R. Nonella
F. Robert Nunes*
Dan O’Brien
Alfred P. Oliverio
John and Tama Oilver
Charles Olvis and
Miranda Morris
Mike and Mary
Orradre
Richard Ruh and
Wendy Palmer
Nicholas M. and
Nicollette Persi
Ken Petersen
John Phillips* and
June Dunbar Phillips
Gregory A. and
Winonna Plaskett
Judy Sulsona and
Bill Rawson
Rex* and Joan Read
Donna Hart Reid
Eugene and Maya
Rizzo
Michael Reid and
Bill Robnett
Paul Rochester*
Lee and Shirley Rosen
Jean Rudolph*
Trustee, The Lauraline
Irvine Foundation
James C. Sanders*
John C. Sanders
Kenneth C. Schley*
Steven Paul Schmidt
Maria Salazar
Segovia
Carol Shade*
JennAnn Shapiro
Connie Shelstad
Robert B. Shepard*
Mimi Sheldon
Janet L. Shing
The Simon Family
Laura Sinks
Mary Skipwith
Sidney Sue Slade
Jim and Jill Sleeper
Madison Smith*
Pamela D. Smith*
Charles and Leslie
Snort*
George Somero and
Amy Anderson

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.

cfmco.org/Legacy
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.

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

cfmco.org/FundForMontereyCounty
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.

### 2022 FINANCIALS

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

<table>
<thead>
<tr>
<th>Additions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions*</td>
<td>$29,189,898</td>
</tr>
<tr>
<td>Other income</td>
<td>829,464</td>
</tr>
<tr>
<td><strong>Total revenues and support</strong></td>
<td>30,019,362</td>
</tr>
<tr>
<td>Investment loss</td>
<td>(42,383,761)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grants and expenses</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants*</td>
<td>28,774,715</td>
</tr>
<tr>
<td>Other operating expenses</td>
<td>5,132,030</td>
</tr>
<tr>
<td><strong>Total grants and expenses</strong></td>
<td>33,906,745</td>
</tr>
<tr>
<td>Decrease in net assets</td>
<td>(46,271,144)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of year</td>
<td>303,210,221</td>
</tr>
<tr>
<td>End of Year</td>
<td>256,939,077</td>
</tr>
</tbody>
</table>

*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**

<table>
<thead>
<tr>
<th>Assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and equivalents</td>
<td>$25,358,903</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>33,907</td>
</tr>
<tr>
<td>Other assets</td>
<td>10,610</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>1,810,196</td>
</tr>
<tr>
<td>Investments, carried at market value: Mutual funds and equities</td>
<td>268,377,545</td>
</tr>
<tr>
<td>Cash and money market funds</td>
<td>13,968,914</td>
</tr>
<tr>
<td>Right-of-use asset, net</td>
<td>147,463</td>
</tr>
<tr>
<td>Charitable gift annuities</td>
<td>4,132,006</td>
</tr>
<tr>
<td>Beneficial interest in remainder trusts administered by other trustees</td>
<td>791,765</td>
</tr>
<tr>
<td>Investments held in charitable remainder trusts</td>
<td>17,330,744</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td>331,962,053</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities and net assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants payable</td>
<td>2,394,853</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>209,385</td>
</tr>
<tr>
<td>Lease Liability</td>
<td>149,632</td>
</tr>
<tr>
<td>Liabilities under split-interest agreements and charitable remainder trusts</td>
<td>12,794,840</td>
</tr>
<tr>
<td>Funds held for others</td>
<td>59,474,265</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td>75,022,976</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td>$256,939,077</td>
</tr>
</tbody>
</table>
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
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

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
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
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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
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Thank You!
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Monterey, CA 93940
831.375.9712

Salinas Office
945 S. Main Street, Suite 207
Salinas, CA 93901
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Our Values
We advance positive change through grantmaking, community engagement and collaboration.

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

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

We embrace diversity, equity and inclusion.

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

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

We strive for excellence in all that we do.
HEALTHY, SAFE, VIBRANT COMMUNITIES