

Giving Matters

WINTER 2023

COMMUNITY FOUNDATION FOR MONTEREY COUNTY NEWS

Here for Good
Community Foundation
for Monterey County

Celebrating Philanthropy

The annual Celebration of Philanthropy on October 11, 2023 brought together Community Foundation for Monterey County (CFMC) fund holders, friends and grantees for a memorable evening. More than 250 people gathered at The Club at Pasadera for the reception.

President/CEO Dan Baldwin spoke about Foundation highlights including the \$11.2 million raised through last year's Monterey County Gives! campaign, \$31 million granted, the Salinas Inclusive Economic Development Initiative, Community Impact Investment Program and \$1.7 million in scholarships awarded to 431 students.



Scholarship recipient Victor Alvara Carmona Vega

Victor Alvara Carmona Vega, recipient of both the CASA Monterey County and the Drezner Family Scholarships, shared his story of overcoming adversity with the support of his foster family and CASA volunteers. He attends UC Santa Cruz and plans to pursue a career in law or social work.

Board Chair Kirk Gafill presented the 2023 Distinguished Trustee Award to

retired Big Sur Fire Chief, Martha Karstens, for her decades of service protecting and serving the Big Sur community. The CFMC Board of Directors present the Award each year to someone who demonstrates philanthropic leadership in our region.

Martha, a Big Sur resident for more than 50 years, trained as an EMT with the American Red Cross Big Sur Ambulance, became a Red Cross CPR instructor and later President of the organization. She joined the Big Sur Fire Brigade as Medical Battalion Chief and expanded its services to include EMT and First Responder services. In 2000 she became a California State Marshal Certified Firefighter and rose to Chief in 2009.

Her complete dedication and leadership were on display when she lost her own home during the Pfeiffer Fire in 2013, but continued as Incident Commander until a Unified Command was established. She was Voted Volunteer Firefighter of the Year (her second time).



Christine Dawson (l), Kirk Gafill and Dan Baldwin (r) congratulate Distinguished Trustee recipient Martha Karstens at the Celebration of Philanthropy

“Martha’s philanthropy has been demonstrated by her selfless, tireless dedication to helping others in her community.” - Kirk Gafill, CFMC Board Chair

As award recipient, Martha designated \$10,000 in CFMC grants which were distributed to her chosen nonprofits: Sea Star Horse Sanctuary, Big Sur Historical Society, Big Sur CERT, Forest Fire Lookout Association and Big Sur Grange.

continued on page 5

Community Wellness Collaborative

The COVID-19 Collaborative was created as a countywide multi-sector collaboration of stakeholders fighting COVID-19 and its impacts on our community. As the pandemic shifted in Fall 2022, the CFMC convened a meeting of key stakeholders to discuss the future role of the Collaborative. In response to input from the group and county leaders, the group has evolved into the Community Wellness Collaborative. The group focuses on mental health and is led by President/CEO Dan Baldwin, and Michael Castro, Director of Community Initiatives and Partnerships,

continued on page 5

President's Message Here for Good

We've reached the time of year when Monterey County Gives! takes center stage. What started modestly in 2009 (\$417,000 raised) has steadily grown into Monterey County's most significant countywide giving celebration. MCGives! raised \$11.2 million in 2022, providing critical support to Monterey County nonprofits as they work to make our communities stronger. The partnership between the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation is focused on maximizing the philanthropic impact of MCGives!

“ Whether a current or prospective donor or a beneficiary of grants, we continue to be your philanthropic partner. ”
— Dan Baldwin, CFMC President/CEO

Year-over-year enhancements, from the introduction of online giving, Challenge Gifts, the ability for donors to gift from their IRAs (QCDs: Qualified Charitable Distributions), to the remarkable contributions driving the tremendous growth of the MCGives! matching pool, have helped inspire donors to make significant investments in our community. This year we're pleased the Harden Foundation, Nancy Eccles and Homer M. Hayward Family Foundation, and Taylor Farms have joined the list of partners. Let the MCGiving begin!

The MCGives! brand has become so strong, we run the risk of overlooking all the good work happening at the CFMC. The Salinas Inclusive Economic Development Initiative (SIEDI) is



President/CEO Dan Baldwin shares CFMC accomplishments at the 2023 Celebration of Philanthropy

completing a two-year program in which nine Salinas-based organizations engaged in projects and received grants and mentoring to better establish themselves and their constituents in the local economy. The Community Wellness Collaborative is bringing together behavioral health agencies to work together on mitigating a chronic issue that has only grown in the post-COVID era. The Siembra Latinos Fund presented its first Alfred Diaz-Infante Award. Alfred was a close friend whose sudden passing remains an emotional burden for me and many other colleagues. The award is a fitting tribute.

All this while the steady work of the CFMC continues. We are well ahead of 2022 in both grants and gifts. We hope to grant \$35 million in 2023. Whether a current or prospective donor or a beneficiary of grants, we continue to be your philanthropic partner.

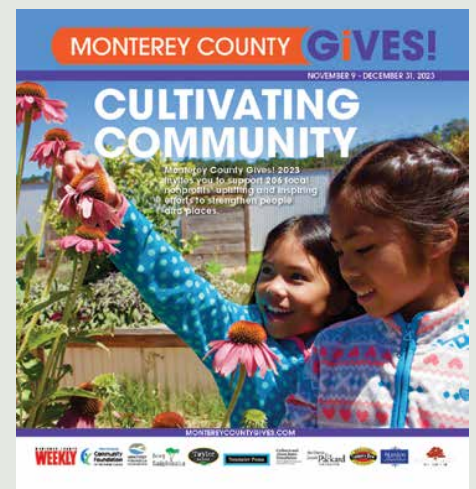
It seems that our country and the world are in a constant state of disruption. We are all limited in what we can affect. At the CFMC, we remain committed to inspiring philanthropy and being a catalyst for strengthening communities throughout Monterey County. We are "Here For Good."

MONTEREY COUNTY **GIVES!** Nov. 9 – Dec. 31, 2023 Joining Together for Big Ideas

The Monterey County Gives! campaign provides participating nonprofits a platform to share their big ideas and leverage end-of-year giving thanks to donors to the matching fund. Gifts made before December 31st to over 200 participating nonprofits will receive a partial match.

The 2022 Monterey County Gives! campaign raised \$11.2 million from over 7,500 generous donors. Since launching in 2009, more than \$56 million has been raised and granted to hundreds of Monterey County nonprofits.

Monterey County Gives! is a partnership between the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation. Thanks to: Gunde & Ernie Posey Family Foundation, Taylor Farms, Neumeier Poma Investment Counsel, Colburn and Alana Jones Foundation of the CFMC, David & Lucile Packard Foundation, Cannery Row Company, Harden Foundation, Nancy Eccles and Homer M. Hayward Family Foundation, CFMC donor advisors and an anonymous donor for their generous support of the match.



Siembra Latinos Celebration

Inaugural Alfred Diaz-Infante Award presented to Ernesto Vela, Ed.D.

The Annual Siembra Latinos Celebration, held September 28th, brought more than 200 guests to enjoy a strolling reception, share accomplishments and raise funds for the future. The program opened with a special toast by Louie Diaz-Infante, SLF Advisory Board Member, and emcee Veronica Macias, news anchor for KION. Ida Lopez Chan, Advisory Board Co-Chair, announced that the fund has granted \$100,000 for education, mental health and economic development for local Latinos.

The highlight of the evening was the presentation of the inaugural Alfred Diaz-Infante Award to Ernesto Vela, Ed.D., Assistant Superintendent of Student Services for the Monterey County Office of Education. In his 27 years in public education, Dr. Vela has served as an elementary school teacher, principal, district office administrator and program director.

The award was established in 2023 to honor the late Alfred Diaz-Infante, a community leader and nonprofit executive, and those who share his legacy by recognizing individuals who work in a collaborative way to make positive change for the Latino Community. "Siembra" means "to sow" and both Alfred and Dr. Vela have sowed seeds of goodwill and progress along their paths.

This was a special evening celebrating family, philanthropy and the Latino community in Monterey County. For more information on the Siembra Latinos Fund mission and impact, visit: cfmco.org/SLF.



Inaugural Alfred Diaz-Infante Award recipient Ernesto Vela, Ed. D. (center), his wife Lupe (left) and the Diaz-Infante family at the Siembra Latinos Celebration

Presenting and Venue Sponsors:



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Media Sponsor: KION TV 46

**and CFMC Employee Matching Gift Program*

Southern Monterey County Foundation Launches Campaign for the Future



Supporters of the Southern Monterey County Foundation celebrate 10 years of impact

The Southern Monterey County Foundation (SMCF) is celebrating an impressive milestone - 10 years of giving back to Southern Monterey County. It got its start in 2013 and has become a vital stakeholder in

improving the quality of life in South County. The fund has granted more than \$200,000 to nonprofits and programs benefiting local residents. Founding Advisory Board member Rob Cullen noted, "It started as a vision. We had no idea how successful it would be. The impact to our community has just been phenomenal."

At the August 12 celebration at the Casey Redtail Ranch in King City, the Advisory Board announced the "Campaign for the Future" with a goal to build an endowment of \$2 million to ensure that the ever-changing needs of the Southern Monterey County community will be met.

"We have a dream for this endowment, to help create a bright future for Southern Monterey County" said Ryan Casey, SMCF Advisory Board Member, whose parents Rich and Sharon Casey hosted the event.

Grants have supported emergency preparedness, youth sports and arts programs, substance abuse prevention, services for seniors, literacy and reading, medical care for people with serious illnesses, libraries and cultural institutions, mental health services and more.

For more information, visit: cfmco.org/SMCF.

Storm Relief Fund Grants Top \$2 Million

One of the ways the CFMC strengthens our communities is through disaster response. Acting as a "philanthropic first responder," the Foundation created the Monterey County Storm Relief Fund on January 10 to assist communities impacted by the 2023 winter storms. The CFMC charges no fees on relief funds so 100% of donations go to grantmaking supporting storm relief and recovery.

Early grants went to three community based organizations: Community Emergency Response Volunteers of the Monterey Peninsula (CERV), Community Bridges and Casa de la Cultura Center. The CERV grant provided financial support to farmworkers in Salinas, Salinas Valley and South County. Community Bridges and Casa de la Cultura Center, both located in Pajaro, provided economic assistance to North Monterey County residents in affected areas. Additional grants went to ACTION Council and Catholic Charities



"The Brighter Bites program helped my family tremendously. We eat healthier and get a variety of vegetables that are good for us." - Parent, Jesse G. Sanchez Elementary in Salinas

of the Diocese of Monterey for storm relief for impacted communities; Community Association of Big Sur (CABS) for storm relief for the Big Sur South Coast and Meals on Wheels of the Monterey Peninsula for emergency response meals including Cachagua and Big Sur.

Since the Pajaro levee breach on March 10, 2023, the majority of grants have gone to benefit the Pajaro community. Recent grants included South Coast Community Land Trust, \$30,000 for continued relief for families affected by the storms and subsequent road closures and Brighter Bites, \$30,000 for food relief for children and their families in Salinas, Greenfield, Gonzales, Castroville and Seaside.

Thanks to our generous donors and grants from several foundations, the Monterey County Storm Relief fund has awarded 65 grants totaling \$2,056,490 through September, 2023. For a full list, please visit cfmco.org/StormReliefGrants.

New Funds Established*

The CFMC manages more than 700 funds created by individuals, families and businesses. For those who wish to establish or contribute to a CFMC fund, please visit cfmco.org/WaystoGive or contact Cecilia Romero at 831.375.9712 x124 to learn more.

Agency Endowment

Nancy J. Jones Housing Insecurity Endowment Fund

Agency Stewardship

Carmel Art Association Stewardship Fund
Community Association of Big Sur Resilience Stewardship Fund
Gilroy Foundation Fund
Jess Tabasa Exhibition Stewardship Fund
Veterans Transition Center of California Stewardship Fund

Designated

Carmel Valley Kiwanis T. Frank Quilty Scholarship Fund

Donor Advised

The Diehl Moltz Fund
Flip a Life Fund
Michael and Wendy Franscioni Fund
Partners in Paradise Fund



Community Association of Big Sur protects and defends the character and beauty of Big Sur and the well-being of its residents

Field of Interest

Willis W. and Ethel M. Clark Foundation Fund

Scholarship and Award

Boewe Bui Scholarship Fund
Stephanie A. Byrne Scholarship Fund
County of Monterey Scholarship Program Fund
Judge Efren and Lite Iglesia Scholarship Fund:
In Memory of Roger and Pat Freet

Special Purpose

Let's Go Outdoors Fund

**Since March 2023*

The Legacy Society Welcomes New Members

The Legacy Society is a group of visionary people who have included the CFMC in their estate plans. We thank these new members for making this meaningful decision.

Anonymous

Teri Breschini

Butch and Patte Kronlund

Salvatore and Ada Maria Lucido

Laurel Robertson

The Simon Family

To learn more, please contact Cecilia Romero at 831.375.9712 x124 or visit cfmco.org/Legacy.

Giving Together

Joe and Sheila Mark

Joe and Sheila met in 1960, two months after Joe moved to Montreal after graduating from Yale and serving in the Army. They worked in the same building and “kept running into each other and the rest was history.”

Tired of the cold, they relocated with their new family to Mountain View, California six years later. Joe co-founded an investment firm in San Francisco and commuted there (even after moving to Carmel in 1978) until his retirement 12 years later.



Joe and Sheila Mark enjoy giving back together

Joe joined the board of the CFMC in the mid-1990s and got to know the needs of local nonprofits. Though their main philanthropic focus is education, they support a range of nonprofits and enjoy seeing the impact of their giving in action,

such as seeing local children eagerly arriving at the Carmel Children's Library after the pandemic.

As a member of the CFMC's investment committee, Joe saw first-hand the Foundation's stewardship of the philanthropic assets entrusted to them. The couple was inspired to donate one of their Carmel properties to the CFMC to create a Charitable Remainder Trust (CRT). With a CRT they receive an immediate tax deduction at the time of the gift and payments for life. They chose the CFMC as the main beneficiary to provide unrestricted grantmaking as part of the Fund for Monterey County. They also utilize gifts of stock and IRA Qualified Charitable Distributions to support causes they care about.

As they just celebrated their 62nd anniversary, they are mindful of passing down the spirit of giving to their 10 grandchildren and a one-year-old great grandchild. Read their story: cfmco.org/Mark.

“ We're fortunate to be a part of a generous community. There is a lot of need out there and giving is one of the best ways to invest your money. ”

— Sheila Mark

Both active community members, Sheila was part of a group that founded The Discovery Shop. Joe was a long-time board member of MIIS (now Middlebury Institute of International Studies), where he and Sheila established a Faculty Fund for professional advancement.

Celebrating Philanthropy, from page 1



The CFMC thanks its donors and partners for helping fulfill its mission, “to inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County.” View photos and read more at cfmco.org/COP2023.

Thank you to our event sponsors:

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Carmel Gives, Integris Wealth Management, Johnson, Fantl & Kennifer, LLP and Walker & Reed, Attorneys at Law

Thank you to Fleurs du Soleil and wine sponsor Scheid Family Wines.

Community Wellness, from page 1

along with a Steering Committee made up of local leaders and practitioners in the field.

At their most recent meeting in September, the Collaborative met to learn about the California Mental Health Reform initiative and consider effective communications approaches to community engagement. Katy Eckert, Bureau Chief/Director of Behavioral Health for the Monterey County Health Department,

presented a local and regional perspective of the implications of the Health Reform initiative. Participants broke into four small groups organized regionally: North County, South County, Salinas Valley and Monterey Peninsula to discuss communication strategies and messaging.

Mental health affects us all. This Collaborative is an example of Monterey County coming together to highlight and address issues that are affecting its community. For more information, please contact Michael Castro at: michaelc@cfmco.org.



Commitment to Equity

The CFMC continues to work towards building more equitable healthy, safe, and vibrant communities. The Foundation recently created the position of Community Impact and Equity Manager and Joel Hernandez Laguna was promoted to this role. In his new capacity, Joel works with the CFMC staff, board of directors and the nonprofit community to help provide critical resources and learning opportunities both within the CFMC and externally.

The Foundation is committed to learning from the community about diversity, equity and inclusion (DEI) principles. In July, CFMC staff attended the Monterey County Race Relations Summit hosted by Black Leaders Allies and Collaborative (BLAAC). The Summit offered a space to learn, share and discuss ways to create a more equitable Monterey County. In September, Joel attended the Martin Luther King, Jr. sculpture and garden unveiling in Marina. In the mid-2000's the statue was removed due to vandalism and potential damage from a nearby construction site.

The DEI staff committee provides opportunities to develop the CFMC's understanding of DEI principles by holding trainings



(l to r) Mel and Regina Mason, Birt Johnson, Jr., Joel Hernandez Laguna and Lyndon Tarver at the Martin Luther King, Jr. statue unveiling in Marina

and discussions. This approach helps provide a safe environment for staff to explore diversity, equity and inclusion challenges and opportunities.

Recently, the CFMC was awarded a \$10,000 grant from the League of California Community Foundations to facilitate listening sessions to gain a deeper understanding of the continued challenges families face due to systemic inequities. An additional goal is to develop a data center on the Foundation's website to share relevant studies on these topics with nonprofits and the general public.



Helping Nonprofits Thrive

The Community Foundation for Monterey County contributes to a strong nonprofit support system through its Center for Nonprofit Excellence (CNE). CNE makes a difference for over 160 nonprofits annually through its free or low-cost resources. Board members and staff from groups of all types and sizes have a chance to learn, grow in confidence and nurture diverse talent in their organizations. In 2023, CNE launched Office Hours with CNE staff plus a free online assessment called the Financial Focus Checkup. Other workshops and peer gatherings helped build nonprofit skills, knowledge and connections.

One such workshop was a DEI discussion series, "Designing Organizations Where Everyone Thrives." It aimed to inspire and support nonprofit staff and board members to take action to build more equitable organizations. Together, the group read and discussed the book "Equity - How to Design Organizations Where Everyone Thrives" by Minal Bopaiah.



Jesse Juarez and Jacqueline Leon present to their LEAD Institute peers

Conversation touched on leadership roles for this work in organizations plus how to identify the systems that either support or limit people in the workplace. There was great camaraderie among participants, who plan to gather again in 2024 for ongoing support.

The CNE is a resource for all nonprofits in our region, whether or not they have received a grant from the Foundation. Each organization's path is unique, and combining CNE services and opportunities builds impact. We invite nonprofits to contact the CNE to explore the full range of services. For more information on CNE visit: cfmco.org/CNE and for DEI resources, visit: cfmco.org/DEI.

Community Impact Program Awards Flexible Two-Year Grants

In response to community-based organizations' requests for more flexible, multi-year grants, our Community Impact grant program is making a growing effort to provide more unrestricted grants. One example is Elkhorn Slough Foundation (ESF), which recently received a \$60,000 operating support grant over two years.

Some studies report that up to 90% of California's wetland areas have been lost. The Elkhorn Slough National Estuarine Research Reserve is one of California's largest coastal salt marshes. Those who visit can easily see the vital, diverse habitat provided by this watershed and tidal salt marsh.



Field trips to Elkhorn Slough inspire local students

Elkhorn Slough Foundation is a nonprofit organization whose mission is to conserve and restore Elkhorn Slough and its watershed. As an accredited land trust, ESF cares for this critical habitat, returning areas that had been diked, drained and farmed, restoring its natural integrity. This grant helps ESF restore freshwater ponds, remove invasive eucalyptus, plant native shrubs/trees and provide trails and educational opportunities for the community. The Reserve also serves as an outdoor, living classroom for students from CSUMB and local K-12 schools.

Community Impact grants are supported by the Fund for Monterey County, a permanent, endowed fund made to meet the changing needs of our community. Made up primarily of field of interest and unrestricted funds created by estate gifts, it serves as a "community chest," which is invested to grow and grant in perpetuity. Learn more at cfmco.org/FFMC and see all recent grants at cfmco.org/CommunityImpact.

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President/CEO

2023 **Here for Good** CAMPAIGN 



The CFMC has been inspiring philanthropy and strengthening communities for more than 75 years. Whether it's strengthening communities through grants, raising funds through MCGives!, Community Impact Investments, or responding to disasters such as COVID-19, wildfires and recent floods, the CFMC is truly "Here for Good."




Thanks to a generous matching gift of \$100,000, your donation to our annual campaign will create double the impact and help the CFMC meet the greatest needs in our community.

Gifts of \$1,000 or more before December 31, 2023 will be recognized in our printed annual report. All donors will be listed on our website. Learn more or give: cfmco.org/HereForGood2023.



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Inside

Celebrating Philanthropy

Community Wellness Collaborative

Siembra Latinos Celebration



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(l to r) Maija West, Erin Clark, Laura Rivera, Judy Guzmán Krueger, Christine Dawson

Women's Fund Inspires

The 16th Annual Women's Fund Luncheon on May 5, 2023 raised more than \$120,000 to uplift local women and girls. Keynote speaker Judy Guzmán Krueger inspired attendees to "Dream, Believe & Achieve" and scholarship recipient Laura Rivera shared her story, thanking Women's Fund donors for helping her work towards her goals. View Judy's and Laura's remarks and see photos at: cfmco.org/WomensFund2023.



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IRA Qualified Charitable Distributions An Easy Way to Give

The IRA Qualified Charitable Distribution (QCD) is a great way to give. Beginning at age 70 ½, you can make QCDs up to \$100,000 in 2023 (\$200,000 for married couples). **New! You can create a Charitable Gift Annuity with an IRA QCD.**

How it works:

- QCD assets can be distributed to many funds at the CFMC including: designated, scholarship, field-of-interest or the Fund for Monterey County. Donor advised funds are not eligible.
- You can benefit several nonprofits with just one gift through the Monterey County Gives! campaign until December 31, 2023.
- QCDs can count toward your Required Minimum Distribution.



Leslie Mulford

Leslie Mulford used her IRA QCD to create a field of interest fund at the CFMC. Read her story: cfmco.org/Mulford

You can also name the CFMC as the beneficiary of an IRA to benefit your favorite causes. Contact Cecilia Romero at (831) 375-9712 x124 or visit cfmco.org/IRA to learn more.