



*Here for Good*

**Community Foundation**  
for Monterey County

**2023 :: ANNUAL REPORT**



**INVESTING**

**IN**



**IMPACT**



# TABLE OF Contents



## MISSION

To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County

## VISION

Healthy, Safe, Vibrant Communities

1	Message to the Community	
2	Monterey County Storm Relief	
3	Community Leadership	
4-5	Strengthening Communities – Grantmaking	
6-7	Creating Opportunity – Dayanara Preciado	
8-9	Inclusive Economic Development – SIEDI	
10-11	Monterey County Gives!	
12	Community Impact Investment	
13	Building Resilience – CNE	
14	Here for Good	
15	Celebrating Philanthropy	
16	Investing in the Future – Fund for Monterey County	
17	Spirit of Giving – Mike and Mary Orradre	
18	Dream, Believe, Achieve – Women’s Fund	
19	Culture of Generosity – Siembra Latinos Fund	
20-21	Giving Local	
22-23	How We’ve Grown	
24	Family of Funds	
25	New Funds	
26	Leaving a Legacy	
27	Stories of Giving	
28-29	Financials and Grant Details	
30-31	Leadership – Board and Staff	
32	Gratitude – Committees and In Memoriam	

## 2023 FAST FACTS



**\$41.4 MILLION**  
Granted Through 2,422 Grants

**\$380.1 MILLION**  
Total Assets

**\$50.3 MILLION**  
Gifts Received

**\$11.9 MILLION**  
Raised for 208 Nonprofits Through  
Monterey County Gives!

**\$2 MILLION**  
Awarded in 495 Scholarships

**44 New Funds**  
Established

# MESSAGE TO THE COMMUNITY

## Investing in Impact

Annual reports are enjoyable reads. They proudly highlight a year's accomplishments, and 2023 had several. Record grants and gifts. Monterey County Gives! continues to grow beyond our wildest expectations, achieving yet another high-water mark in gifts and donors. Our disaster relief work, propelled by the generosity of a caring community, was in high gear as Winter and Spring storms raised havoc. The Community Impact Investment program allowed organizations doing vital work in Monterey County to expand their built environment. Scholarships, new funds, the Salinas Inclusive Economic Initiative, the remarkable work of the Center for Nonprofit Excellence...the list goes on.

One of the drawbacks of annual reports is that word "annual." As 12-month snapshots they sometimes fail to acknowledge that community foundations work in a continuum. While snapshots are energizing, they don't speak to the greater impact that occurs over time. If we're going to accurately depict the work of the CFMC, it needs more than a one-year glance to be revealed.

With this in mind, the 2023 Annual Report provides a look at how our work year-over-year has produced impact that can't be understood in a single year's data point. Here are a few you'll see inside this report. Record grants of \$41 million are eye-popping. Wow! What a great year! They certainly made a difference in Monterey County. But what about \$109 million in grants over three years?

With reference to impact, scholarships are one of the easiest "connect-the-dots" categories. Facilitating opportunity for students to attain higher education is one of the best investments communities can make in their future. Many students in Monterey County are first in their family to attend college. \$2 million in scholarships in 2023 sends a strong message about the impact of philanthropy in opening doors for young people while expanding the supply of knowledgeable workers in our local economy (much of the CFMC staff reflects this). Put this in the context of \$7.6 million in scholarships over the past five years, and one can clearly see this investment will change lives and strengthen our community.

None of this is possible without caring donors, an attentive and engaged board of directors and staff who are completely committed to delivering on the CFMC's mission. The needs of Monterey County change over time, and the CFMC must remain nimble and responsive to these needs. Impact is meant to be long lasting, especially when we're [Here for Good](#).



Kirk Gafill  
2023 Board Chair



Daniel R. Baldwin  
President/CEO



Impact is meant  
to be long lasting,  
especially when  
we're [Here for Good](#).

**Dan Baldwin**  
President/CEO, CFMC



# RESPONDING TO DISASTER

## Monterey County Storm Relief Fund

A significant role for the Community Foundation for Monterey County (CFMC) is to facilitate the philanthropic response to disasters. Unfortunately, the need arose again with winter storms in January 2023 and the Pajaro levee breach in March 2023.

The CFMC created the Monterey County Storm Relief Fund on January 10, 2023 with \$100,000. The Monterey Peninsula Foundation added \$100,000 and the Conrad N. Hilton Foundation, David and Lucile Packard Foundation, Sunlight Giving Foundation and Vistra provided significant support along with donations from the community.

Funding assisted numerous nonprofits with their relief and recovery efforts, including a focus on Pajaro and other North Monterey County communities after the Pajaro levee breach. The first grant of \$50,000 was awarded to Community Emergency Response Volunteers of the Monterey Peninsula (CERV) for financial support to farmworkers. Grants rapidly followed to Meals on Wheels of the Monterey Peninsula for emergency response meals, Salud Para la Gente and Pajaro Valley Shelter Services for emergency hotel support and Community Bridges and others for storm relief for residents.



The American Red Cross of the Central Coast received a grant to assist people affected by the Pajaro levee breach



Grants to Casa de la Cultura Center helped Sister Rosa Dolores (l) and her team support Pajaro residents affected by flooding

The fund has distributed more than \$2.1 million through nearly 70 grants supporting emergency shelters for evacuees and displaced residents, food and supplies distribution, equipment for first responders, repairing damaged facilities and small business relief.

### GRANT HIGHLIGHTS

- **ALL-IN Monterey County** received four grants to provide emergency relief and help meet basic needs with hotel vouchers, tents/sleeping bags, water, clothing, flashlights, PPE and more at the fairgrounds shelter and in the community.
- **Monterey Firefighters Community Foundation** received a grant for equipment to help clear fallen trees after the storms. They purchased six battery-operated chainsaws, which are safer to use than gas-powered. According to CEO Raul Pantoja, the new chainsaw helped save a firefighter's life.
- **Casa de la Cultura Center** is a trusted resource for the Pajaro community, especially for farmworkers. The organization received three grants to provide community members with direct financial support including hotel stays for families and medically fragile residents and basic household items such as diapers, wipes, bottled water and personal care items.



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

**Established**  
January 10, 2023

**\$2,180,490**  
Granted Through 2023

**69**  
Grants

# COMMUNITY

## Leadership



*SIEDI reception (l to r) the Honorable Lydia Villarreal, former board member for CFMC and The James Irvine Foundation, Cheng Ung and Liz Posey of The James Irvine Foundation, Michael Castro and Dan Baldwin of the CFMC*

Through the years, the CFMC expanded its impact by growing as a community leader. Responding quickly to disasters has unfortunately become a more frequent and visible demonstration of this capability. Numerous fire funds, the COVID-19 Relief Fund, the Monterey County Storm Relief Fund and activating the Big Sur Disaster Relief Fund are examples of this, granting millions of dollars to help those affected.

The CFMC's behind the scenes work brings people and nonprofits together to address challenges around important issues such as homelessness, affordable housing and mental health. The VIDA (Virus Integrated Distribution of Aid) program and Community Wellness Collaborative (CWC) are two prime examples.

VIDA was originally going to be a six-month program. Due to the hard work and dedication of Community Health Workers (CHWs), it has continued for more than three years. VIDA began when the County of Monterey recognized a trusted messenger network was needed to stem the tide of rising COVID-19 cases in 2020. VIDA CHWs are community members that have undergone training to help their neighbors navigate complex systems to gain access to programs and services.

As the pandemic shifted, the need for CHWs remained but their focus evolved. Rather than connecting people to quarantine resources and COVID-19 best practices, they connected to food distribution sites and mental health resources. In early 2023, VIDA CHWs responded where they were most needed, working at Local Assistance Centers, helping residents affected

by flooding. More recently, they have been talking with community members about the importance of mental health. Over the last three years, VIDA has had several impressive accomplishments such as leading outreach campaigns, distributing over 115,000 food boxes, 80,000 COVID-19 rapid tests and holding over 800,000 in-person conversations.

The Community Wellness Collaborative evolved from the COVID-19 Collaborative. A planning session and interviews were held, and mental health emerged as the priority focus area. The complexities of mental health care were exacerbated by the pandemic, particularly in low-income communities. The CFMC continued the Collaborative model and created a multisector forum for parties to come together to share resources and work toward a common goal.

The CWC recognizes there is no simple solution to the challenges of mental health in Monterey County but coming together to discuss and highlight them will help lessen the negative impact on the community.

The Salinas Inclusive Economic Development Initiative (SIEDI), (see pages 8-9), is another example of the CFMC's commitment to provide support beyond grantmaking. The Foundation will continue to partner with others to address complex issues towards our vision of *healthy, safe, vibrant communities*.



Janet Shing at CFMC's  
Salinas Office

# STRENGTHENING COMMUNITIES

## Grantmaking Reflections

**Janet Shing**  
**Director of Grantmaking**

4

\$4.9 million - that was the total the CFMC granted in 2002, the year I joined the staff. (CFMC awarded grants totaling \$41 million in 2023). At that time, grants were awarded in general areas, such as education, health and community services, that supported our mission statement – to improve the quality of life in Monterey County. Our main application-based program represented 40% of CFMC's annual grantmaking, and staff's work reflected that. We accepted grant requests via mail, facsimile, email and hand-delivery.

In 2010, CFMC updated its mission statement, now *"To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County"* – and then, everything changed. Donors saw CFMC as their "design studio" for philanthropy. The number of designated endowment funds, field of interest funds and agency endowment funds grew.

The CFMC's board encouraged grantmaking to focus on results and impact. In 2012, we unveiled the Community Impact (CI) grant program with funding priorities that narrowed and clarified our interests. CI grants increased the board and community members' role in reviewing and recommending funding amounts. Over the next 10 years, we sought feedback and implemented changes to streamline the grant guidelines and process.

We experimented, we learned and we continued to make improvements. In more recent years, we have increased the number of two-year grants awarded and the number of operating grants.

Until 2015, our strategic plan and daily work were grounded in three goals: Community Impact, Philanthropic Leadership and Organizational Excellence. In 2015, the fourth goal of Community Leadership was added, which allowed CFMC to expand its grantmaking in unprecedented ways. The CFMC extended its leadership and grantmaking throughout the county via new place-based affiliate funds that work like a foundation within CFMC.

Over the years, CFMC has reflected on local and national discussions on social justice and civil rights issues, listened to local nonprofit leaders, paid attention to community concerns and followed regional and national trends in grantmaking. Our values are at the core of our grantmaking – advancing positive change, being open and honest and operating with the highest standards that include a commitment to fairness and respect. We are in the process of a comprehensive assessment of our discretionary grant programs. I, for one, am excited to see what the next decade brings and how the CFMC will continue to evolve.



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



Our values are at the core of our grantmaking.

**Janet Shing**  
*Director of Grantmaking*



# IMPACT IN ACTION

## Grantmaking 2023

Thanks to caring individuals, families and businesses, the CFMC granted a record \$41.4 million in 2023. These dollars fund critical needs and causes in Monterey County and beyond. Grants and awards help feed the hungry, shelter the unhoused, improve literacy, inspire artists and musicians, care for animals, protect the environment and help students fund their college education. These are just a few examples of how grants address critical local needs.



### CASA

CASA of Monterey County (CMC) trains and supports community volunteers who advocate for abused or neglected children placed in foster care, upholding the children's rights while pursuing a safe and permanent home. CMC has been on the frontline for these vulnerable child victims through its Court Appointed Special Advocates (CASA) program.

The program serves approximately 200 foster youth annually and recently expanded services to include babies and toddlers, as well as youth in the Juvenile Justice system. In 2023, CASA received a \$25,000 Community Impact grant to recruit, train and support these invaluable community volunteers.



### ELKHORN SLOUGH FOUNDATION

The Elkhorn Slough Foundation (ESF) works to conserve and restore the Elkhorn Slough and its watershed. With more than 4,200 acres of protected lands and waters, it is the largest tidal salt marsh in California outside of San Francisco. In 2023, ESF received a \$60,000 Community Impact grant over two years for operating support to fulfill their mission and stewardship efforts.

ESF's initiatives for children and youth provide both in-school and after-school enrichment for elementary, high school and college students and their families in North Monterey County. Work continues to preserve and restore ESF's Porter Ranch as a locally-significant historical and educational resource and future community center.



### HOPE, HORSES & KIDS

The mission of Hope, Horses & Kids (HHK) is to nurture the mind, body and spirit of children and youth with special needs and from diverse backgrounds through equine-assisted learning. The demand for programs grew during the pandemic with children and families seeking safe, outdoor opportunities for connection.

The organization expanded its audience to children of all abilities to address the challenges and stress of remote learning. In 2023, HHK received a \$15,000 Community Impact grant for operating support that will serve more than 150 local youth living with physical, emotional, cognitive and behavioral challenges.

**\$41.4 MILLION**  
Granted in 2023

**2,422**  
Total Grants in 2023

**\$109,229,124**  
Granted 2021-2023

# CREATING OPPORTUNITY Scholarships



Taylor Farms has awarded more than \$4.1 million in scholarships

CFMC scholarships have grown tenfold from \$219,000 and 25 scholarships in 2013 to more than \$2 million in nearly 500 scholarships in 2023. The growth was assisted by a 2017 four-year grant from the College Futures Foundation which began a trend towards needs-based scholarships. College Futures Monterey County scholarship program has become an integral part of the CFMC's annual offerings.

The initial grant from the College Futures Foundation created an online portal in which students could apply for and be matched with many scholarships through just one application. The fund is supported by donor advisors and others who have created named funds within the program. College Futures Monterey County awards more than \$165,000 per year through an average of 45 scholarships.

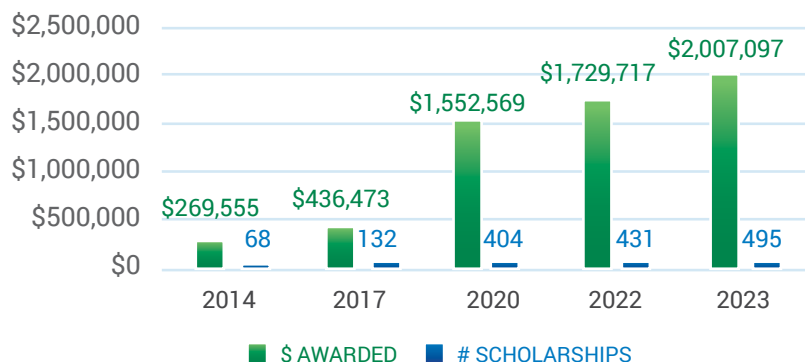
Several businesses have fueled the growth in scholarships, including Taylor Farms, Church Brothers-True Leaf Farms, Raymond H. Costa Family, Visa Verde Labor, The Morse Foundation and more.

CFMC scholarship funds are established by individuals, families and businesses who recognize the value of education and want to help students pursue their educational, career and personal goals. Scholarships continue to have the ripple effect of benefiting local students, their families and the communities they so often come back to serve.



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

## SCHOLARSHIP GROWTH 2014-2023





# SCHOLAR SPOTLIGHT

## Dayanara Preciado

Dayanara Preciado received three scholarships from the CFMC in 2023: the Ipson Tully Memorial Scholarship, Steve and Marti Diamond Scholarship and a College Futures Scholarship. She attends the University of California, Berkeley, with a double major in Political Science and Legal Studies.

Naturally shy and grappling with the challenges of learning a new language, Dayanara, a first-generation Mexican-American, spent eight years in English Literacy Development classes. Like many students from immigrant families who speak only their native language at home, she faced significant difficulties learning English. It wasn't until she participated in Mock Trials and Ethics Bowls through her AP Literature class at Salinas High School that she discovered the power of her voice. This experience ignited her confidence and passion for the courtroom stating, "I want to become an attorney to use my voice toward advocacy and change."

Acknowledging that pursuing higher education and professional aspirations involved pushing past cultural norms and expectations for women and girls, she credits her mentor, English Teacher Andrew Rodriguez, for the support and encouragement. It is important to her to do something she loves in life and be a source of inspiration to those coming after her. She is grateful for the scholarships she has received through the CFMC.

Dayanara has a firm belief that access to all levels of education is critically important and shouldn't be limited by one's financial status or cultural background. Her ultimate aspiration is to advocate for marginalized voices who cannot defend themselves due to language and financial barriers. Knowing there are individuals willing to invest in her dreams will continue to inspire her as she uses her voice, talents and education to be a changemaker for others.

CFMC is proud to work with students like Dayanara and our generous scholarship fund holders to invest in future leaders and create healthy, safe, vibrant communities for generations to come.



Scholarship recipient Dayanara Preciado is majoring in Political Science and Legal Studies at U.C. Berkeley

7



"I want to become an attorney to use my voice toward advocacy and change."

Dayanara Preciado

**\$2,007,097**  
Awarded in 2023

**495**  
Scholarships

**475**  
Students

**77**  
Scholarship  
Funds

# INCLUSIVE Economic Development



# SIEDI

The Salinas Inclusive Economic Development Initiative (SIEDI) is a collective journey with a shared commitment to build a more inclusive and equitable economy for the families and communities of the Salinas Valley. New methodologies, personnel and nonprofits were brought together to ask what would happen if the community better understood its role in the economy.

SIEDI was a two-year initiative, funded with an initial \$3 million grant from The James Irvine Foundation, that awarded cohort members \$100,000 per year of unrestricted funds to support them as they engaged with the local economic development processes in ways that centered the voices, assets and needs of the community.

SIEDI held quarterly convenings for cohort members to come together and strategize on different topics such as housing, education and the digital divide. Increased organizational capacity was a significant focus. Cohort members have specific skill sets and work with unique populations. It was critical that funds could be used for what organizations knew was most needed.

One of SIEDI's strengths is diverse sector representation that includes art, technology, agriculture and community advocacy. It has received recognition from both County and State governments.

Participants best express the impact of their involvement.

"SIEDI has given us the opportunity to continue developing emerging leaders through our Resident Leadership Academy and provide them with tools and support to make real economic changes in the lives of families and communities," said Francsico Rodriguez, Monterey Bay Central Labor Council.

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

## INAUGURAL SIEDI COHORT

ALBA (Agriculture and Land-Based Training Association)

BHC (Building Healthy Communities)

CCA (Center for Community Advocacy)

CBDIO (Centro Binacional Para El Desarrollo Indígena Oaxaqueño)

Hijos del Sol

LFC (Loaves, Fishes & Computers)

Monterey Bay Central Labor Council

Mujeres en Acción

Rancho Cielo



SIEDI is probably the most important movement right now for the Salinas Valley.

**Jackie Cruz**

*Vice President of Advancement, Hartnell College and  
Executive Director for Hartnell College Foundation*

*SIEDI quarterly convenings brought members together to address important economic development issues*



In addition to learning and working together, SIEDI had numerous successes. Partners were able to encourage over 100 local residents to apply for a local apprenticeship program with Joby Aviation for paid job training. The Joby Aviation and SIEDI partnership is a true victory for Monterey County, which led to Mujeres en Acción speaking at a state interview in support of Joby Aviation receiving a \$9.8 million CalCompetes grant for their Marina expansion that will support more than 600 jobs.

CBDIO has expanded its footprint in South County, providing services to Indigenous Communities such as document translation and resources navigation. Clarisa Reyes-Becerra of CBDIO noted, "We have established comités of Mexican Indigenous farmworkers and their families, providing facilitation, training and leadership development so that the comités are empowered to advocate for inclusive policies in education, housing and health care. One win at the Santa Rita Union School District led to the creation of the first Mixteco afterschool program in the region. The comités are now growing stronger, both in size and strength."

Hijos del Sol's Artistic Director, Jose Ortiz, recalls that people did not believe his ability to draw would offer a living wage. Hijos del Sol was recently able to develop a process for bidding on and securing agreements for mural installations. These efforts further empowered community residents through meaningful employment opportunities.



(l to r) Matt Field, Joby CFO; María Elena Manzo, Mujeres en Acción; Cody Cleverly, Workforce Development Lead; Barbara Meister, SIEDI mentor; Dan Coughlin, Joby Special Projects Lead, celebrate CalCompetes grant

"Moving the needle on economic freedom among local financially stressed citizens cannot happen overnight," shares Christian Mendelsohn, Executive Director, Hijos del Sol. "SIEDI enabled Hijos del Sol to hire seven staff, create our first independent art studio, and increase our confidence, structure, potential, and focus. When well-seasoned advisors, mentors, consultants, and \$100,000 per year come to a small organization, it can be truly transformational—and it has," he continued.

SIEDI was recently renewed for another two years thanks to a generous \$3.35 million grant from The James Irvine Foundation. SIEDI will continue to build on previous work and include three additional cohort members. The success so far demonstrates the impact that can be made by deep, consistent investment in our community leaders.

**\$3 MILLION**  
Initial Investment by  
The James Irvine  
Foundation

**\$2.3 MILLION**  
Regranted to Local  
Nonprofits Through 2023

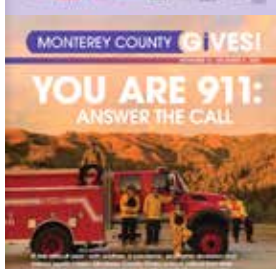
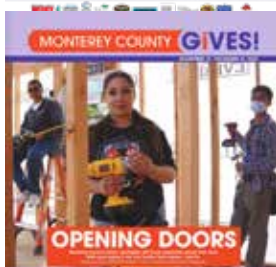
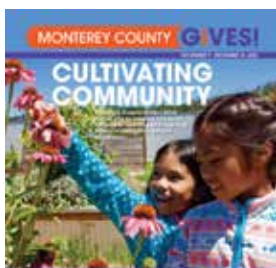
**\$3.35 MILLION**  
Grant Renewal from  
The James Irvine  
Foundation

**2-YEAR  
EXTENSION**  
Three More  
Partners to Come



# MONTEREY COUNTY GIVES!

## Your Generosity Multiplied



Monterey County Gives! evolved from a donor advised fund created by the Monterey County Weekly in 2000. The CFMC joined forces with the Weekly in 2009 and the new format, online giving portal and expansion in number of nonprofits and matching funds each year expanded the campaign's impact. The Monterey Peninsula Foundation joined as a partner in 2015 and the campaign has grown each year, demonstrating the power of local philanthropy. MC Gives! has raised and granted more than \$68 million to hundreds of Monterey County nonprofits.



Nonprofits are vital to our community and a cornerstone to what defines us, what exemplifies our values and spirit. Collaboration. Partnership. Synergy. These are the keys to MC Gives!

**Bradley Zeve**

*Founder, Monterey County Weekly*

The cumulative impact of gifts both large and small helps these local nonprofits better fulfill their missions and meet the needs of the people they serve.

### BEYOND THE NUMBERS

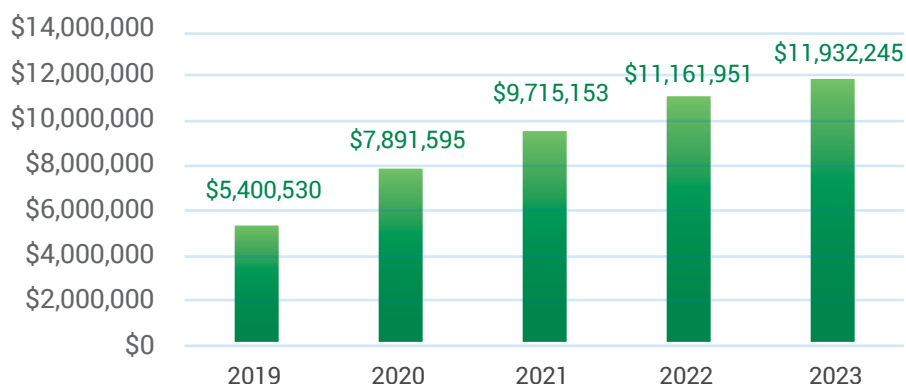
The amount raised each year, even though impressive, doesn't tell the whole story. Christine Dawson, CFMC Senior Vice President Philanthropic Services, points out "in addition to fundraising, Monterey County Gives! brings awareness to so many nonprofits in the area, helping to attract new supporters and volunteers for years to come."



[mcgives.com](http://mcgives.com)

### GROWING IMPACT

**\$68 MILLION RAISED AND GRANTED SINCE 2009**



# MONTEREY COUNTY **GIVES!**

Joining Together for Big Ideas

Monterey County Gives! continues to shine a spotlight on the incredible generosity and commitment of our community towards local nonprofits. In 2023, a record 8,035 people came together to donate an astounding \$11.9 million, a \$700,000 increase over 2022.

Each nonprofit received 100% of donations plus a pro rata match, thanks to local donors and matching fund sponsors. Grants supported over 200 nonprofits serving Monterey County in diverse focus areas such as arts & culture, community & social service and environment & sustainability.

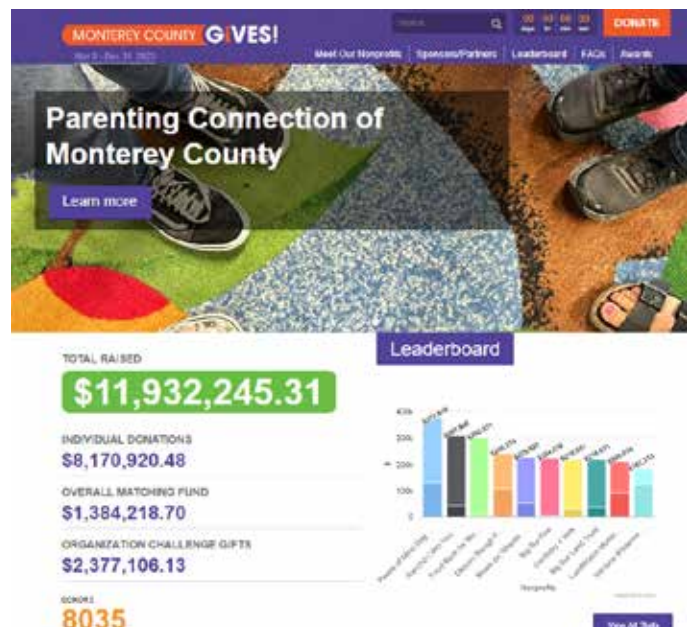
Monterey County Gives! has become an integral part of the year-end giving season. The exposure to new audiences and influx of support helps newer and established nonprofits alike bolster operations and implement new ideas.

Staci Alziebler-Perkins, Executive Director of Gathering for Women, notes, "MC Gives! helps us appeal to those who want to help vulnerable homeless and housing insecure women in our County. Every year we see new and continuing donors who are excited about our work, and we are constantly amazed by the generosity of our community."

Each year the CFMC sponsors additional awards in four categories. The 2023 awards went to:

- \$2,500 Ingenuity Grant - Everyone's Harvest
- \$1,000 Largest Number of Donors Award - Peace of Mind Dog Rescue
- \$1,000 Most Donors 18-35 Years Old - Monterey Peninsula Pride
- \$1,000 Florence Haspel Zeve Award for Women, Families and/or the Arts - Boys & Girls Clubs of Monterey County

MC Gives! is a special project of the Community Foundation for Monterey County, the Monterey County Weekly and the Monterey Peninsula Foundation. Thank you to the Gunde and Ernie Posey Family Foundation, Taylor Farms, Neumeier Poma Investment Counsel, Colburn and Alana Jones Foundation of the CFMC, the David and Lucile Packard Foundation, Cannery Row Company, Harden Foundation, Nancy Eccles and Homer M. Hayward Family Foundation, CFMC donor advisors and many individual online donors for their generous support of the matching fund.



**\$11,932,245**  
Total Donations

**208**  
Participating  
Nonprofits

**8,035**  
Donors



A Community Impact Investment loan helped the Monterey Museum of Art acquire the Miller Adobe to expand their services

# COMMUNITY IMPACT Investment

The Community Impact Investment (CII) program continues to grow as it enters its sixth year. CII, established in 2018, aims to enhance communities by strategically investing in local programs and projects, going beyond traditional grantmaking. These investments are intended to generate both community benefits and market or near-market returns for the CFMC portfolio. As opposed to a grant, CII allocations are loans, designated as part of the CFMC's Investment Policy.

In 2023 the CFMC added \$1,770,000 to the CII portfolio by making a loan to the Monterey Museum of Art. This loan facilitated the museum's acquisition of the historic Miller Adobe property adjacent to its current site on Pacific Street. Working closely with the City of Monterey and local stakeholders, the museum envisions expanding its gallery space to better serve the community. The CII loan plays a crucial role in the Museum developing a vibrant arts presence in Monterey.

Also in 2023, the CFMC saw one of their very first CII loans be fully repaid as it reached maturity. The loan was issued in 2018 for \$1,000,000 to the Accion Opportunity Fund (AOF). AOF utilized the loan to offer flexible financing arrangements to entrepreneurs in marginalized communities. These individuals often face challenges in accessing traditional financing options due to factors such as limited business experience and other constraints.

Active CII recipients from prior years include FarmLink (\$750,000), CHISPA (\$250,000), MEDA/El Pajaro CDC (\$150,000) and United Way (\$1,000,000). FarmLink's purpose is to provide flexibly structured financing to underserved and new farmers. They provided 18 loans to 18 businesses in Monterey County in 2023, 17 of which are BIPOC-owned (black, indigenous and people of color). The CII program will continue to invest, beyond grantmaking, to impact our community.



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



We are grateful for the transformational CII loan for the purchase of the Miller Adobe. This advances the Museum's capacity to provide exceptional arts experiences for future generations."

**Cory Madden**

*Executive Director, Monterey Museum of Art*

**\$1.77 MILLION**

Loaned to  
Monterey Museum of Art

**\$8.04 MILLION**

Total Committed to  
Eight Organizations

**\$1 MILLION**

in Prior Loans  
Fully Repaid in 2023



# BUILDING NONPROFIT RESILIENCE

## CNE Reflections

**Susie Polnaszek**

**Director, Center for Nonprofit Excellence**

Communities are made up of people, and together we organize our efforts in meaningful ways through nonprofits. In my 15 years at the CFMC, I've gotten to know hundreds of local leaders investing in themselves and their nonprofits' resilience. I'm proud that we have amplified their investment through the CNE and its many resources, especially through the pandemic era.

A few stories illustrate this. King City-based Sol Treasures has grown from a grassroots recipient of a CFMC Neighborhood Grant into a vibrant nonprofit home for the arts. Through CNE's Community Leadership Project (2013-2017), the South County nonprofit found mentor support and developed crucial infrastructure for communications, HR and fund development.

Resilience was certainly tested during COVID-19 and nonprofit peer support was vital. Sol Treasures' Executive Director (ED) Jeff Hinderscheid participated in the Community Foundation's LEAD Institute seminars. He was euphoric to share a video with us when their performing arts programs re-emerged from COVID-19 closures. We celebrated alongside Jeff in seeing the audience of hundreds of kids erupt into cheers and shouts for the vibrant performance.



CNE hosts opportunities for peer learning and support like the Executive Directors Roundtable

Gateway Center of Monterey County supports quality of life for adults with developmental disabilities and has done so for 60 years. It has invested in becoming a forward-thinking, professional operation rooted in compassionate care. Gateway partners with the CNE for consulting, Organizational Development funding, and developing great staff. Gateway's ED, Robert Freiri, has coached rising leaders in our community for over a decade through LEAD Institute.

These are just two of the local nonprofits growing and learning together and seeing a return on the CFMC's cumulative investment in nonprofit sector excellence over the years. The CNE has built a track record of delivering an array of vital programs responsive to the specific needs of local nonprofits, including LEAD (with nearly 200 graduates from 125 organizations) and sessions on topics such as diversity, equity and inclusion, donor development and impactful board service. "At CNE, my colleague, Reid Norris, and I are committed to uplifting, connecting and investing in the great people doing critical work in our community."



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

## 2023

FAST  
FACTS

**18**

LEAD Institute  
Graduates  
(196 Total)

**\$84,580**

Organizational Development  
Grants Awarded

**CREATED**

CNE Advisor Circle and  
Office Hours

**185**

Nonprofits Engaged with CNE  
(1,969 Contact Hours)

**43**

Executive Directors  
Attended Roundtables



**center for  
nonprofit excellence**

COMMUNITY FOUNDATION FOR MONTEREY COUNTY



## 2023 *Here for Good* CAMPAIGN

Since its founding in 1945, the Community Foundation for Monterey County has been inspiring philanthropy and strengthening communities. Our motto “*Here for Good*” reflects both our ability to respond to changing circumstances and the fact that the impact of local generosity will bring enduring benefit for future generations.

The power of local philanthropy helps us strengthen nonprofits through grants and professional development,

## YEAR-END GIVING \$300,000 Raised for CFMC

respond to disasters such as COVID-19, wildfires, floods and storms, help nonprofits grow through Monterey County Gives! and lead community initiatives.

The Here for Good annual campaign supports the work of the CFMC. And, thanks to a generous \$100,000 matching gift from Bertie Elliott, these donors generated double the impact of their donations. Thank you. We appreciate your support. You are “*Here for Good*.”

### HERE FOR GOOD 2023 DONOR LIST

#### HERE FOR GOOD (\$25,000 +)

Bertie Elliott\*

#### CATALYST (\$10,000+)

Amy Anderson and  
George Somero\*  
Bill and Nancy Doolittle\*  
Robert Haas, in honor of  
Wolfgang Haas  
Craig and Christine Johnson  
The Alexander F. Victor  
Foundation

#### PARTNERS IN PHILANTHROPY (\$5,000+)

Patrick and Aimee Burke  
Kevin Cartwright and  
Stephen Eimer  
Joel and Dena Gambord\*  
The Hevrdejs Foundation  
The Meadows Charitable Fund  
at Schwab Charitable  
The Talbott Family Foundation  
Walker & Reed, LLP  
Marty and Francesca Wolf\*  
Ken and Mary Wright  
Marsha McMahan Zelus\*

#### Friends of the Foundation (\$1,000+)

Anonymous(2)\*  
Anonymous(3)  
1st Capital Bank  
Barry Adler and  
Betsy Buchalter Adler\*  
Tonya Antle\*  
Geoffrey and Suzanne Ashton  
Lino and Teri Belli  
Dick and Judy Borda  
Incy Brooks  
Dale and Margaret Byrne\*

Dr. Esmond Chan  
Greg and Liz Chilton  
The Dalal Family  
Christine B. Factor  
Jim and Renee Fuqua\*  
Kirk and Meridith Gaffill  
Tracy Gibbons\*  
Tom Hopkins  
Robert L. and Millie House  
Victor and Lynda Johnson  
Birt and Kathleen Johnson, Jr\*  
Carol and Chuck Keller\*  
Caron and Alan Lacy  
Jane Lundy  
Brooks McChesney\*  
Sherrie McCullough  
Arthur McLoughlin Jr.  
Marylu and David Mesa  
Karen and Clint Miller  
Kathleen Morell  
Anthony and  
Lary Lynn Muller\*  
Stephen and  
Martha Wright Nelson  
Alan and Lesley Pedersen  
Joseph and Mary Pezzini  
Ernest and Gunde Posey  
William N. Reno  
Janet Shing\*  
Robert and Florence Slinger  
Fund of the CFMC  
Soo Giving Fund at Fidelity  
Charitable  
Stahl Family Charitable Fund at  
Fidelity Charitable  
Marian Van Horn  
Jennifer Walker and Eric Lee  
Molly Warner  
Scott and Beth Williams  
David and Susan Wirship



[cfmco.org/HereForGood2023](https://cfmco.org/HereForGood2023)

#### SUPPORTERS

Anonymous (1)  
Frank and Regina Amato  
Jane Anfinson  
David G. Armanasco  
Kit Armstrong  
Jerry Azevedo  
Dan Baldwin and  
Anne Ylvisaker\*  
Judy Beech, in memory of  
David Beech  
David and LuAnn Bennett  
Barbara A. Block  
Lupe C. Boronda  
Casey and Sara Boyns  
Paul and Susan Bruer  
Peggy Burnside  
Casaterra Group, Inc.  
Susan M. Dauphine  
Steve and Sharon Davies\*  
Carl E. Davis, in memory of  
Doris Parker Fee  
John and Gail Delorey  
James F. Earl  
Keith Ehrman and  
Ms. Annette Zecca, in  
memory of Ken and  
Jean Ehrman  
Sam Fonte  
Frances R. Gaver  
Bruce and Lauren Haase  
Wayne Harlan  
Reuben and Tamara Harris  
Berte Hirschfield  
Linda Humber  
Rick and Martha Kennifer  
Paul L. Lapidus and  
Lindasue Marshall  
Ellen McEwen and Tom Leduc  
Rob and Kathleen Lee

Richard Lundy  
Agnes Martelet  
Mick and Nicki McMahan  
Steven M. and Ying C. Mitchell  
Janet A. Montgomery and  
John M. Arnesen  
Joanne Nissen, in honor of  
Ken Wright  
George Nobori  
J. T. Oldham  
Cathy Perez  
Melissa Pickford and  
Mr. John Kern  
Vaughan and Margot Pratt  
Jason Reed  
Kay Rigg and Jean Rigg  
Francine M. Rodd  
Lee and Shirley Rosen\*  
Brian and Julie Roth  
Lynne T. Sexton  
Keith and Susan Slocum  
David Smiley  
Margaret A. Smith  
Gloria Souza and  
Sandie Borthwick  
Margaret Spring and  
Mark Bunter, in memory of  
Justin Spring  
James and Deitra Steiner  
Jane A. Stile  
Nancy Tostevin, in memory of  
J. Breck Tostevin  
Danielle Vierra  
Grant L. and  
Norma J. Voth  
David Watts  
Jeremy C. Wire  
Jay Zimmer

\* Gift from a donor advised  
fund of the CFMC

# CELEBRATING Philanthropy

A key part of the CFMC's mission is *"To inspire philanthropy."* Throughout the year we share donor stories and the impact of local giving. Our annual Celebration of Philanthropy brings together fund holders, friends and partners to commemorate the year's accomplishments and honor an individual or couple who demonstrates philanthropic leadership in our region.

More than 250 people gathered on October 11, 2023 at The Club at Pasadera for the reception and program. President/CEO Dan Baldwin spoke about Foundation highlights including the success of the Monterey County Gives! campaign, the record growth in grantmaking, the Salinas Inclusive Economic Development Initiative, Community Impact Investment Program and scholarships.

Victor Alvaro Carmona Vargas, who received 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. It honors her decades of service protecting and serving Big Sur. Martha, a Big Sur resident for more than 50 years, has devoted her time and talents for the betterment of her community.

Trained as an EMT with the American Red Cross Big Sur Ambulance, Martha became a CPR instructor and later President of the organization. She joined the Big Sur Fire Brigade as Medical Battalion Chief and added EMT and First Responder services. In 2000 she became a California State Marshal Certified Firefighter and rose to Chief in 2009. She showed her dedication and leadership when she lost her own home during the Pfeiffer Fire in 2013, but carried on as Incident Commander. She has twice been voted Volunteer Firefighter of the Year.

Martha designated \$10,000 in CFMC grants to be distributed to her chosen nonprofits: Sea Star Horse Sanctuary, Big Sur Historical Society, Big Sur CERT, Forest Fire Lookout Association and Big Sur Grange. Our congratulations and thanks to Martha for her service and dedication.



[cfmco.org/COP2023](https://cfmco.org/COP2023)



Kirk Gafill (l), Christine Dawson and Dan Baldwin (r) congratulate Distinguished Trustee recipient Martha Karstens (center) and scholarship speaker Victor Vargas



Martha's philanthropy  
has been demonstrated  
by her selfless, tireless  
dedication to helping  
others in her community.

**Kirk Gafill**  
CFMC Board Chair

15

## THANK YOU TO OUR EVENT SPONSORS

### Partners in Philanthropy



**CARMEL REALTY COMPANY**  
ESTABLISHED 1913

### Friends of the Foundation

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





Courtesy Point Lobos docent Castel Ortiz and Point Lobos Foundation

# ENDURING IMPACT

## Fund for Monterey County

16

The Fund for Monterey County (FFMC) allows people to create an enduring legacy for our community. The FFMC is comprised of endowed funds - unrestricted and field of interest - that are invested to grow and forever benefit the people and places of Monterey County.

The FFMC currently generates more than \$2 million in annual grants, benefiting local nonprofits working in a variety of areas including: children and youth development, health and human services, arts, culture and historic preservation, community development and the environment.

The CFMC reviews and awards grants through the Community Impact grant program, which addresses our greatest local challenges. The Fund also provides resources for emerging needs such as disaster response, providing relief and recovery grants for wildfires, storms and flooding.

### HOW IT WORKS

- Your unrestricted gift provides philanthropic resources to meet current and future challenges.
- You can give directly to the Fund for Monterey County in your lifetime or name the FFMC as the beneficiary of your will, trust, donor advised fund, retirement account or life-income gift.
- Your gift creates a source of community capital, helping to do good work forever.

The team at the CFMC can help you explore the best ways to give. We are grateful for all those who have invested in the future of Monterey County by including the FFMC in their giving plans. Growing the Fund for Monterey County ensures that the CFMC will continue to meet changing needs, now and in the future.



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



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

# SPIRIT OF GIVING

## Mike and Mary Orradre

“Be humble. Be simple. Bring joy to others.” Mike and Mary Orradre have lived by that motto all of their lives. Mike was born and raised in San Ardo. After graduating from Santa Clara University with a BS in Business, and a stint in the Navy, his life’s work has been raising cattle on the ranch his grandfather purchased in 1872, now proudly joined by the next generation.

Mary, a self-proclaimed “import” from Washington state, graduated from San Diego College for Women (now SDSU) with a degree in Economics and a teaching credential. She taught for two years and met Mike after following a nun’s advice to “never refuse a blind date.” They have been on the family ranch since 1964, where Mary says they have honored their pact, “I stayed out of the corral, and he stayed out of the kitchen. Everything worked just fine.” They raised five sons, all in agribusiness and “within driving distance of the ranch,” and will celebrate their 60th wedding anniversary in October 2024.

Mary shares that giving back has been “part of their DNA. Mike was taught by his parents, I was taught by mine. It’s just how we operate. We gave as we were able to, and it grew over time.” Their roots run deep in Southern Monterey County, where Mary served on several boards including San Ardo School, her local church and the CFMC, while Mike volunteered on the Salinas Valley Fair board.

In addition to giving generously of their time, Mary has worked with her community to be a catalyst for good, raising and donating funds for major projects for both Mission San Miguel and Mission San Antonio. Donor Advised Fundholders of the CFMC since 2001, the Orradres provided the seed grant to start the Southern Monterey County Foundation of the CFMC in 2013. “Their endorsement made a major difference in launching the Southern Monterey County Foundation,” notes Christine Dawson, Senior Vice President Philanthropic Services.

Their primary focus is on education, youth and family, showcased by many grants to organizations including Monterey County Agricultural and Rural Life Museum, YOSAL, Sol Treasures, Rancho Cielo and First Tee Monterey County. They like giving in partnership with the CFMC “because it’s easy” and they enjoy the added boost nonprofits receive when making year-end grants through the Monterey County Gives! campaign. Some of their most meaningful giving has been a scholarship established in Mike’s late brother’s name at King City High School.

Never seeking the spotlight, they nevertheless graciously accepted the CFMC Distinguished Trustee award in 2011 for their philanthropic impact on our region. They are passing on their spirit of giving to their children, who each volunteer in their communities. As Legacy Society members of the CFMC, the legacy they’d like to leave is, “We did this, please carry on and make it better.”



Mike and Mary Orradre received the CFMC Distinguished Trustee Award at the 2011 Celebration of Philanthropy and were presented with a painting by Kiara Long

17



We give because  
it’s the right  
thing to do.

Mary Orradre



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

# DREAM, BELIEVE, ACHIEVE

## Women's Fund

The Women's Fund inspires women and girls to dream, believe and achieve. With more than \$2.7 million granted since 2003, the Women's Fund has become a powerful source of impact and opportunity. Key accomplishments of the Women's Fund include the creation of the Girls' Health' in Girls' Hands' (GHGH) program, scholarships and support of women's leadership, advocacy and economic well-being.

In 2023 the 16th Annual Women's Fund Luncheon returned in full force, meeting for the first time in person since 2019. More than 600 guests came together to enjoy the inspiring program, raising more than \$120,000 to uplift local women and girls. Keynote speaker Judy Guzmán Krueger shared her story and spoke about the importance of women supporting women and building an internal source of self-trust and confidence. She reminded us it's not too late to take control of our financial lives, develop a mission and follow our dreams.

Scholarship recipient Laura Rivera spoke about the impact of GHGH, "I was able to receive tremendous support from an amazing group of women. We were always encouraged to do more and reach for the stars. It was thanks to them that I decided to continue with higher education."

The Women's Fund has awarded \$447,000 in scholarships since 2016. We thank all Women's Fund donors and sponsors for helping women and girls work towards their goals and realize their full potential.

### 2023 SPONSOR RECOGNITION

#### Presenting Sponsors

Leavy-Galvin-Knight Family



**Diamond Sponsors** David and Susan Gill, Kim Negri, SKN Properties



**Platinum Sponsors** IMPOWER, Montage Health Foundation, TMD Creative

**Gold Sponsors** The Allaire Family, Tonya Antle, Peggy & Jack Baskin Foundation, Bianchi, Kasavan & Pope, LLP, Lucia Boggiatto, Boys & Girls Clubs of Monterey County, Cannery Row Company, Carmel Woman's Club, Carmel Youth Center, Jeri Gattis, Groza Construction, Hartnell College Foundation, Monterey County Weekly, Carle Mowell, Natividad Foundation, SNIP Mobile Spray & Neuter



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

(l to r) 2023 keynote speaker Judy Guzmán Krueger, Women's Fund Luncheon guests, scholarship speaker Laura Rivera

**\$34,977**

Granted in 2023



**\$2,149,904**

Endowment



**\$30,000**

in Scholarships Awarded  
in 2023  
(\$447,000 Total)





# CULTURE OF GENEROSITY

## Siembra Latinos Fund



The Siembra Latinos Fund (SLF) was created in 2017 to improve the quality of life for Latinos in Monterey County. It was started by a group of local Latino leaders to build on a culture of philanthropy and inspire giving. "Siembra" means "to sow" and the fund seeks to grow opportunity for the Latino community in Monterey County. A field of interest fund of the CFMC, the SLF has granted more than \$100,000 supporting education, mental health and economic development.

In 2023, the SLF was proud to announce the creation of the Alfred Diaz-Infante Award. The award was established to honor the work and legacy of Alfred Diaz-Infante, a community leader and nonprofit executive who created partnerships to elevate the Latino community in Monterey County.

At the SLF Annual Celebration, Advisory Council Co-Chair, Ida Lopez Chan, presented the prestigious 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 a teacher, principal, district office administrator and program director.

During her remarks, Ida shared the importance of the fund to her, "The Siembra Latinos Fund allows me to pay it forward to honor the legacy of my family who came here seeking the American Dream. It is the foundation for our community to prosper, grow and thrive."

With more than half of Monterey County residents of Latino decent, harnessing the power and leadership of the Latino community is vital to the economic prosperity our region. Through the Seeds of Change endowment campaign, Siembra aims to continue investing in the education, economic prosperity and overall well-being of Latino residents.

Building the Siembra Latinos Fund creates philanthropic resources to strengthen nonprofits and ensures that the ever-changing needs of the local Latino community will be met.



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

19

*(l to r) Inaugural Alfred Diaz-Infante Award Recipient Ernesto Vela (center) his wife Lupe (left) and members of the Diaz-Infante family; Grant recipient Salinas Community Science Workshop's co-director Nadine Salas and student Anthony Cruz at Siembra's Annual Celebration; Javier Coyt and Siembra Advisory Council member Lluvia Del Rio*



Granted  
**\$26,500**  
in 2023

**\$233,000**  
Raised Since 2018,  
with \$104,500 Granted



**\$25,000**  
Pledged Through Seeds of  
Change Major Gift Campaign



Presented Inaugural  
**Alfred Diaz-Infante  
Award to  
Ernesto Vela Ed.D.**

# GIVING LOCAL



*Harmony at Home received a NMCF grant for their Family First program*

## Northern Monterey County Foundation

The Northern Monterey County Foundation (NMCF) was created in 2016 to build philanthropic resources to improve the quality of life for area residents. A local advisory council with a deep understanding of community needs provides oversight, defines grantmaking priorities and raises funds that are distributed to community organizations serving Northern Monterey County. Having granted \$245,000 since 2016, the NMCF demonstrates the power of place-based philanthropy. In 2023, the NMCF, an affiliate fund of the CFMC, granted \$45,000 to 10 organizations.

Harmony At Home received a grant from the NMCF for their program Family First – Young Families Thriving within Northern Monterey County. Family First partners with young parents to gain knowledge, skills and confidence and to focus on their infant/child's development and wellness. They are supported as they earn a high school diploma or GED certificate and pursue secondary education or a certification in a trade to break the cycles of poverty, prevent homelessness and unlock improved financial futures for the entire family.

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



*O'Neill Sea Odyssey received a SMCF grant to provide youth with marine education*

## Southern Monterey County Foundation

The Southern Monterey County Foundation (SMCF) celebrated an impressive milestone in 2023 - 10 years of giving back to Southern Monterey County. A "foundation within a foundation" the SMCF is an affiliate fund of the CFMC. The SMCF raises funds and makes grants to strengthen communities in South County from King City to points south to the Monterey County line.

The fund has granted \$223,000 to nonprofits and programs benefiting local residents. Grants support emergency preparedness, youth sports and arts programs, substance abuse prevention, services for seniors, literacy, medical care, libraries and cultural institutions, mental health services and more.

In 2023, the SMCF granted \$31,160 to 13 organizations. O'Neill Sea Odyssey received a grant to support three King City classes with their marine science program and give many students their first chance to experience the ocean.

At the 10th Anniversary celebration in 2023, the SMCF Advisory Council announced the launch of the "Campaign for the Future" with a goal to build an endowment of \$2 million. A strong endowment will provide a continuing source of grants for groups providing care and support to the people of South County.

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

NMCF Granted  
**\$45,000**  
in 2023

NMCF Granted  
**\$245,000**  
Since 2016

SMCF Granted  
**\$31,160**  
in 2023

SMCF Granted  
**\$223,000**  
Since 2014



UC Berkeley Hastings Reserve received a CFCV grant to provide environmental education in Cachagua



Big Sur Land Trust received a grant for fuel break maintenance

## Community Fund for Carmel Valley

The Community Fund for Carmel Valley (CFCV), an affiliate fund of the CFMC, was created to offer residents, businesses and organizations an opportunity to contribute to the greater good of others in Carmel Valley. The CFCV seeks to respond to community needs and improve the lives of Carmel Valley residents, both now and in the future.

The CFCV has become a strong and responsive vehicle for local philanthropy in Carmel Valley. In January 2023, when atmospheric rivers flooded Monterey County, the CFCV Advisory Council immediately granted \$15,000 to the Carmel Valley Rotary Club Foundation to purchase gift cards for residents impacted by the storms. In total, the CFCV provided \$27,000 for flood relief in 2023.

In its 2023 annual grantmaking, the CFCV granted \$24,500 to nonprofits that focus on projects and programs benefiting the communities of Carmel Valley. Ten nonprofits received grants in areas such as education, safety, meals for families, youth camps and other community-enhancing programs. The CFCV granted more than \$300,000 since its inception in 2020 including \$188,000 for relief and recovery from the 2020 fires.

As a result of the generous donations received in 2023 including Monterey County Gives!, the CFCV has been strengthened to be able to make an even greater impact in 2024 and beyond.

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

## Big Sur Fund in Memory of Weston Call

Big Sur has a unique spirit, sense of place and community. A special purpose fund of the CFMC, its mission is to provide sustainable, impactful and supplemental funding to nonprofit organizations benefiting the residents of Big Sur and to build resources for disaster relief.

Priorities include creating funding for health, fire and safety needs, supporting educational, cultural and historical programs, aiding sustainable tourism, creating and enhancing community partnerships, supporting nonprofits providing services in Big Sur and disaster response.

Big Sur is extremely vulnerable to all kinds of natural and other disasters such as fires, floods and structural damage from storms. Part of the Fund's mission is to build philanthropic resources for disaster relief to quickly partner with local agencies when disaster strikes. Since its inception, the Fund has granted more than \$150,000 to nonprofits serving Big Sur.

In 2023, the Big Sur Fund granted \$29,700 to 10 organizations. Big Sur Land Trust received a grant for shaded fuel break maintenance for the Palo Colorado Canyon emergency access road. The goal is to reduce the fire fuel hazard and protect road infrastructure. This is just one example of how the fund improves the quality of life in Big Sur.

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

CFCV Granted  
**\$51,500**  
(\$27,000 for Disaster Relief)  
in 2023

CFCV Granted  
**\$300,000**  
Since 2020

Big Sur Fund Granted  
**\$29,700**  
in 2023

Big Sur Fund Granted  
**\$150,997**  
Since 2018





## HOW WE'VE GROWN

Impact attracts resources. This has long been a credo of the CFMC. If our grants, programs and services are effective, donors will partner with us to enhance their philanthropy and make a difference in Monterey County and beyond.

22

The success of this approach is evident by almost every measure. The Foundation has also grown in non-quantifiable ways such as special initiatives, diversity, equity and inclusion efforts and community leadership. To make this progress, we have benefited from incredible leadership from our Board of Directors. We asked three of our Past Board Chairs to reflect on changes they have observed over the years.



In the past 30 years, the Foundation has swung from being an asset gatherer, which it initially needed to be, to a robust grantmaker. The organization has also become increasingly adept at meeting countywide disaster challenges, from wildfires in Carmel Valley, flood damage in Pajaro to road closures in Big Sur. Additionally, the recent establishment of Community Impact Investments has enabled the Foundation to assist other worthy nonprofit organizations with their own capital campaigns.

**Bill Doolittle**  
*Board Chair, 1993-1994*



“Here for Good” has never been more germane than it is today. Key partnerships, such as Monterey County Gives! and the support and encouragement of local leadership in South County philanthropy, are examples of CFMC's continuous evolution. The CFMC measures its success by how much it invests in community philanthropy vs. tallying its assets. The organization's stellar reputation allows it to be in leadership roles huddling our community around positive outcomes. We all felt the positive impacts of CFMC's role gathering people and organizations around critical solutions to the COVID-19 crisis and providing vital support for communities suffering from disasters.

**Kurt Gollnick**  
*Board Chair, 2011*



The Community Foundation for Monterey County has grown into an organization with truly countywide vision and impact, willingly adapting its role to best meet the needs of our community. The CFMC has extended its leadership, outreach and support through a network of partnerships, affiliate funds and initiatives likely not envisioned in its earlier years. Its board and staff reflect the diversity of the County and its residents, bringing people together around the shared commitment to inspire philanthropy and strengthen our community.

**Mary Wright**  
*Board Chair, 2005-2006*

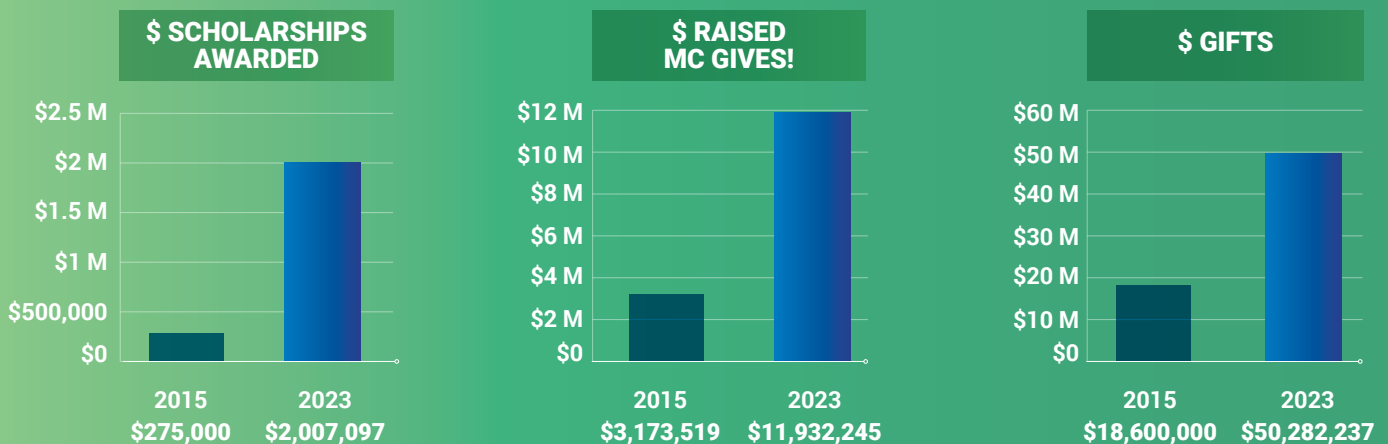
2023 Past Board Chairs Luncheon Standing (l to r) CFMC President/CEO Dan Baldwin, Kurt Gollnick, Bill Doolittle, Birt Johnson, Jr., Clay Larson, Rick Kennifer, Craig Johnson, David Armanasco, Greg Chilton, CFMC Senior VP Philanthropic Resources, Christine Dawson Seated (l to r) Mary Wright, Gail Delorey, Kirk Gaffill (2023/2024 Board Chair), Teri Belli, Bertie Elliott

# GROWTH by the Numbers

For more than a decade the Community Foundation for Monterey County has grown its impact by almost every metric. Record numbers include grantmaking, scholarships and amount raised and granted through Monterey County Gives!

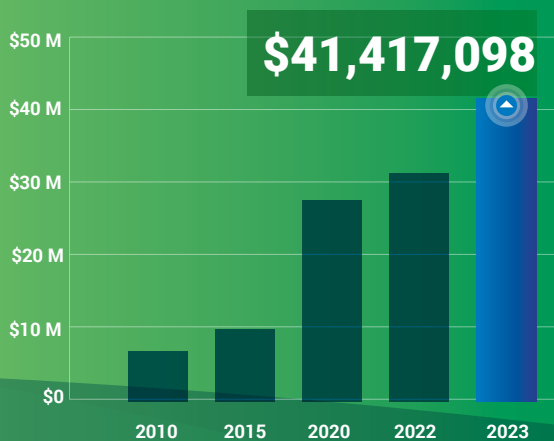
More and more donors come to the CFMC to fulfill their philanthropic vision, as reflected in the amount of gifts, number of funds and growth in total assets. The CFMC is honored to be a steward of the philanthropic resources entrusted to us. We look forward to working with our donors and nonprofit partners to build on their generosity and hard work to expand our collective impact well into the future.

## GROWTH AT A GLANCE



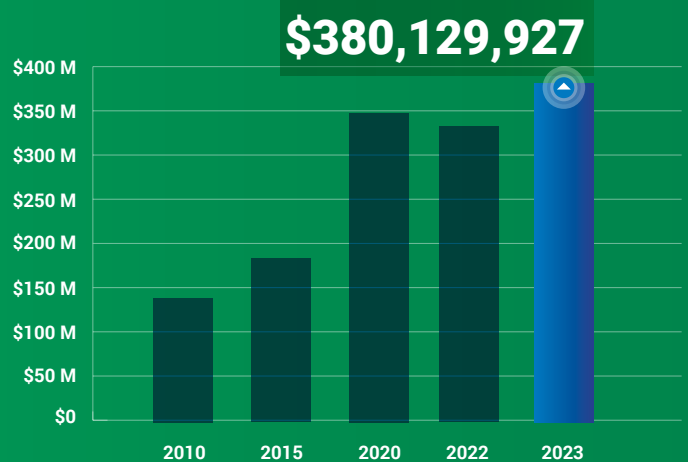
23

## \$ GROWTH IN GRANTS



2010	\$6,433,499
2015	\$9,778,712
2020	\$27,147,557
2022	\$31,203,648
2023	\$41,417,098

## \$ GROWTH IN TOTAL ASSETS



2010	\$137,678,876
2015	\$180,284,198
2020	\$347,659,194
2022	\$331,962,053
2023	\$380,129,927

# FAMILY OF FUNDS

The CFMC holds more than 700 funds created by generous individuals, families and businesses. The Foundation 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.

## Types of Funds

### AFFILIATE FUNDS

A local advisory council 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 nonprofits of their choice and benefit from customized service 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 create opportunities for and invest in the future of local students.

### SPECIAL PURPOSE FUNDS

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

24



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

(l to r) Communities for Sustainable Monterey County, Steve and Marti Diamond Scholarship Fund event, Shuman Heart House opening Tyller Williamson, Robin McCrae, Janet Shing, Juan Sanchez





# NEW FUNDS CREATED

We thank those individuals, nonprofits and businesses who have chosen to partner with us in establishing these funds.\*

## AGENCY

Breast Cancer Assistance Group Stewardship Fund  
Carmel Art Association Stewardship Fund  
Community Association of Big Sur Resilience Stewardship Fund  
Community Partnership for Youth Capital Fund  
Friends of Andy Ausonio Library Endowment Fund  
Gilroy Foundation Fund  
Junior League of Monterey County Stewardship Fund  
Nancy J. Jones Housing Insecurity Endowment Fund  
LandWatch Legacy Stewardship Fund  
The Los Altos Sunset Rotary with Bill and Mabel Mayhood Fund  
Monterey Peninsula Buddhist Temple Stewardship Fund I  
Monterey Peninsula Buddhist Temple Stewardship Fund II  
Saint John the Baptist Building Stewardship Fund  
Soledad Community Center Capital Campaign  
Jess Tabasa Education Stewardship Fund  
Jess Tabasa Exhibition Stewardship Fund  
Veterans Transition Center of California Stewardship Fund  
Youth Arts Collective Stewardship Fund

## CAPITAL CAMPAIGN

The Marina High School Stadium Capital Campaign

## DONOR ADVISED

Bride Kiniry Family Foundation Fund  
Albert R. and Patricia K. Ceresa Fund  
The Diehl Moltz Fund  
Natalie and Eric Drobny Fund  
The Fernandez Morell Family Fund  
The Peter and Erline Fichtner Charitable Fund  
Flip a Life Fund  
Michael and Wendy Franscioni Fund  
Elke Junger Making a Difference Fund  
Howard & Gretchen Leach Fund  
Monterey County Children's Fund  
Nahas Family Fund  
Mimi and George Niesen Mostly Arts and Youth Fund  
The Nunes Company Fund  
Parker and Shapiro Family Fund  
Partners in Paradise Fund  
Post Ranch Inn Big Sur Community Fund  
Vince Sercia Humanitarian Fund  
Simon Family Fund  
David Soskin Memorial Fund  
Spradling Family Giving Fund  
Wanda C. Vollmer Foundation Fund  
Judy Williamson Fund  
F.H. Woo Family Fund  
Dave and Judi Zaches Charitable Foundation Fund

## DESIGNATED

Carmel Valley Kiwanis T. Frank Quilty Scholarship Fund

## FIELD OF INTEREST

Willis W. and Ethel M. Clark Foundation Fund

## SCHOLARSHIP & 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  
Montage Health Fund for Monterey County Teachers  
Megan Reis Imagine Scholarship Fund  
Taylor Farms SoCal Award Program Fund

## SPECIAL PURPOSE

The City of Soledad Recreational Fund  
Let's Go Outdoors Fund  
MPNFA Nanao Earthquake Relief Fund  
MPRPD Transportation Grant

## TEMPORARY DISCRETIONARY

Monterey County Storm Relief Fund

\*New Funds created January 2023 through May 2024



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

(l to r) Gonzales Community Center Capital Campaign rendering, Nancy J. Jones Housing Insecurity Endowment Fund donation, Special Kids Connect



# LEAVING a Legacy

Leaving a legacy through a planned gift is a meaningful way to make an enduring 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 (11)	Larry Davidson and Beverly Dekker-Davidson*	Dick Hawkinson*	Butch and Patte Kronlund	David M. Nee	Pamela D. Smith*
Mrs. Wilber K. Amonette*	Wallace F. and Lucille Davis*	Thomas Hawley	Paul Lawrence* and Marian Buccafurni	Gary O. and Diane Nelson	Charles and Leslie Snorf*
Tonya and Rick* Antle	Christine Dawson	Holly and Jeff Haynes	Douglas C. Lee	Vicki Nelson	George Somero and Amy Anderson
Yvonne A. Ascher and Leonard Laub	John and Gail Delorey	Peter* and Jacqueline Henning	Laurel Lee-Alexander	Diane R. Nonella	David and Maryanne Spradling
Nancy Ausonio	Steve and Sona Dennis	Joseph and Elizabeth Heston	Pam and Gifford Lehman	F. Robert Nunes*	Elizabeth Stacey and Wayne Peter Marien
Tony Ayres*	Martin Dodd*	Carol and Don Hilburn	Brian and Carol LeNeve	Dan O'Brien	Jean Stallings
Daniel R. Baldwin and Anne Ylvisaker	Meg Donat	Peter Hiller and Celeste Williams	Jennifer Levey	Alfred P. Oliverio	Loren Steck and Annette Yee Steck
Robert P. Balles	Natasha M. Doner	Richard Hobley and Deborah Steel	Jack and Angeleke Levy	John and Tama Olver	Judy Sulsona and Bill Rawson
Nancy L. Bartell	Dr. William Donovan	Jeffrey and Amanda Holder	David S. and Norma Lewis*	Charles Olvis and Miranda Morris	Tom Sweeney
Ingrid V. Bartels	William and Nancy Doolittle	Beverly D. Holloway	Esther H. Lindsey*	Mike and Mary Orradre	Lawrence A. Tartaglino
Peggy Downes Baskin*	Julie Drezner	Jeanne S. Holmquist*	Robert H. Lindsey	Richard Ruh and Wendy Palmer	Robert and Leslie Taylor
Nancy Bletzer*	Jean Duff	Tom Hopkins	Karin T. Locke	Nicholas M. Pasculli	Fredrick W. Terman* and Nan Borreson
Lisa Bennett and Robin White	Stephen Eimer and Kevin Ann Cartwright	Robert and Millie House	Salvatore and Ada Maria Lucido	Barbara Paul and Tom LaFaille	Shirley Thackara*
John B. Bergin*	Frances H. Elgan*	Chris and Toula Hubbard	Todd Lueders	Ken Petersen	Michael and Cindy Lee Thatcher
Danny Bernstein and Leslie Steinway	Bertie Bialek Elliott	Kip and Jay Hudson	Valera W. Lyles	John Phillips* and June Dunbar Phillips	Brian Thayer
Paul P. Bianchi	Sharlene Erwin	Vince Huth	Tom and Kathy Macdonald	Gregory A. and Winoma Plaskett	Peter and Anne* Thorp
Joyce Blevins and Katherine M. Coopman	Norma Esselstyn	Gloria and Michael Ipson	Betsy MacGowan	Rex* and Joan Reade	Vincent and Evelyn Torras*
James W. Bogart	Catherine Kobrinsky	Dee Irvine	John and Ann Mahoney	Donna Hart Reid*	William H. and Susanne S. Tyler, III
Thomas Bohnen	Evans	Jack Jewett	Jan and Tannie Mandel*	Eugene and Maya Rizzo	Patricia Tynan-Chapman*
Teri Breschini	Lowell I. Figen*	Cyrus and Jean Fitton*	Roger and Carolann Manley	Dr. Laurel Robertson	William Umeki
Stephen and Barbara Brooks	Cyrus and Jean Fitton*	Anne R. Fitzpatrick	Michael and Tobi Marcus	Michael Reid and Bill Robnett	James R. Valentine*
Jay and Ann Brown	Sandra Forman	Jeffrey Fowler	Joseph A. and Sheila Mark	Paul Rochester*	Jan Vanderbilt
William Parker	Jeffrey Fowler	Johnson	Michael and Tobi Marcus	Lee and Shirley Rosen	Robin Venuti and Joseph Rock*
Bullard and Jessica Frischling	Crawford E.* and Linda P. Foy	Joanne Taylor	Marcus	Jean Rudolph* trustee, The Lauralie Irvine Foundation	Arlene Wall
Julie A. Cason and Lisa K. Crawley	Susie* and Charly Franklin	Mark and Susan Johnson	Dr. William McAfee*	James C. Sanders*	Daphne and Stuart Wells
Joseph and Betty Chaffers*	Joan M. Franz	Colburn and Alana Jones	John C. Sanders	John C. Sanders	Jacqueline Wendland
Mishka Chudilowsky and Henry Azama	Allen Fuhs*	Joanne K. Juarez	Kenneth C. Schley*	Steven Paul Schmidt	Benjamin and Mary Ann Whitten
Mary J. Clapper*	John and Laura Gamble	Karen Judkins and Steven Wade	Steven Paul Schmidt	Maria Salazar Segovia	Nels P. and Jill Wiegand
Jim and Marie Colbert	Joel S. and Dena Gambord	Deborah Juran	Carol Shade*	Carol Shade*	Martin R. Wolf
Arthur Connell*	James and Jeri Gattis	Karen D. Kadushin	JeriAnn Shapiro	Connie Shelstad*	Kenneth and Mary Wright
Julie Conrad	Donald* and Frances Gaver	Kampe	Connie Shelstad*	Robert B. Sheppard*	Richard Zahm*
Leland and Gloria Dake*	Kevin Gilman	Mary Ann Kane*	Robert B. Sheppard*	Mimi Sheridan	
Margaret D'Arrigo	Lupe Gomez*	Rick and Martha Kennifer	Robert B. Sheppard*	Janet L. Shing	
Robert N. Danziger*	Rodney Guilfoil*	Capt. Steven D. Kesselring and Jean M. Forrest	Robert B. Sheppard*	The Simon Family	
and Martha Drexler Lynn	Terry Haber*	Alice V. Kinsler	Robert B. Sheppard*	Laura Sinks	
	Bernard E. Hanly	Mary Koch	Robert B. Sheppard*	Mary Skipwith	
	Ruth Hartmann*		Robert B. Sheppard*	Sidney Sue Slade	
	Peter C. Hatton*		Robert B. Sheppard*	Jim and Jill Sleeper	
	Virginia O. Hawes		Robert B. Sheppard*	Madison Smith*	

\*In Memoriam

## The 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. 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)
- Life Income Gift - Charitable Remainder Trust (CRT) or Charitable Gift Annuity (CGA)
- Designate the CFMC as beneficiary of a retirement plan, life insurance or IRA
- Create an Endowed Fund (or contribute \$25,000 or more to an endowed fund)

Please contact Cecilia Romero at 831.375.9712 or [legacy@cfmco.org](mailto:legacy@cfmco.org) to explore these important gifts. We would be honored to assist you.

# STORIES of Giving

## CARMEL REALTY COMPANY

For over 100 years, Carmel Realty Company has been investing in our community through volunteerism and other philanthropic actions. Acting on their commitment to supporting important community causes, they partnered with the CFMC to establish the Carmel Realty Foundation, a company donor advised fund that helps the company reduce its administrative burden and increase and diversify its giving.

“Rather than the expense and burden of a private foundation, we established the Carmel Realty Foundation at the CFMC in 2015,” noted Bill Mitchell, Managing Director of Carmel Realty Company. “It allowed us to formalize and simplify what we were already doing. It’s even increased our giving since it has made it so much easier.”

Since 2015, a portion of every transaction of Carmel Realty and Monterey Coast Realty has been contributed to the Carmel Realty Foundation of the CFMC. In the nearly 10 years of this thriving partnership, \$600,000 has been granted. The company’s philosophy and impact was celebrated in 2023, when Carmel Realty Company received the National Philanthropy Day for the Central Coast’s Outstanding Philanthropic Corporation of the Year.



Roger and Pat Freet (pictured) were honored through a scholarship created by Judge Efren and Lite Iglesia



Carmel Realty was honored at the 2023 National Philanthropy Day Awards. (l to r) Christine Dawson with Shelly Mitchell Lynch and Dan Lynch of Carmel Realty Company

## JUDGE EFREN AND LITE IGLESIA SCHOLARSHIPS IN MEMORY OF ROGER AND PAT FREET

The Judge Efren and Lite Iglesia Scholarships in memory of Roger and Pat Freet were established by retired Monterey County Superior Court Judge Efren Iglesia and his wife Lite, to honor the memories of the late Roger and Pat Freet of Reedley, California. The couple were responsible for bringing Efren Iglesia (at age 21) to the United States during a politically tumultuous time in the Philippines in 1971.

They then saw Efren through college and law school in the U.S. Roger was a long-time Superintendent of Schools for the Kings Canyon Unified School District. Judge Iglesia retired in 2020 after practicing as a lawyer for 31 years and serving as a judge for 13 years. His wife, Lite, worked as a registered nurse for 44 years before retiring in 2020.

The CFMC works with the Reedley Rotary Club to facilitate the scholarship selection and awards at Reedley High School and Reedley College, as well as works with local organizations awarding three scholarships to graduating Monterey County high school students from within the Filipino-American community. In the future, Judge Iglesia wishes to establish scholarships that benefit students at the elementary and high schools from which he graduated in the Philippines.



# 2023 Financials



cfmco.org/Finances

## COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2023

<b>Additions</b>	
Contributions*	\$50,282,237
Other income	678,955
<b>Total revenues and support</b>	<b>\$50,961,192</b>
Investment gains	32,198,179
<b>Grants and expenses</b>	
Grants*	\$36,704,351
Other operating expenses	5,379,355
<b>Total grants and expenses</b>	<b>\$42,083,706</b>
<b>Increase in net assets</b>	<b>41,075,665</b>
<b>Net assets</b>	
Beginning of year	256,939,077
<b>End of Year</b>	<b>\$298,014,742</b>

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

## CONSOLIDATED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2023

<b>Assets</b>	
Cash and equivalents	\$28,011,972
Contributions receivable	3,634,100
Other assets	12,639
Property and equipment, net	2,240,577
Investments, carried at market value: Mutual funds and equities	301,102,008
Cash and money market funds	18,324,960
Right-of-use asset, net	107,005
Charitable gift annuities	4,589,794
Beneficial interest in remainder trusts administered by other trustees	860,500
Investments held in charitable remainder trusts	21,246,927
<b>Total assets</b>	<b>\$380,129,927</b>
<b>Liabilities and net assets</b>	
Grants payable	\$2,015,701
Accounts payable and accrued expenses	318,263
Lease liability	110,144
Liabilities under split-interest agreements and charitable remainder trusts	14,261,524
Funds held for others	65,409,553
<b>Total liabilities</b>	<b>\$82,115,185</b>
<b>Total net assets</b>	<b>\$298,014,742</b>

The condensed financial information was prepared based upon audited financial statements prepared by Hutchinson and Bloodgood, LLP.

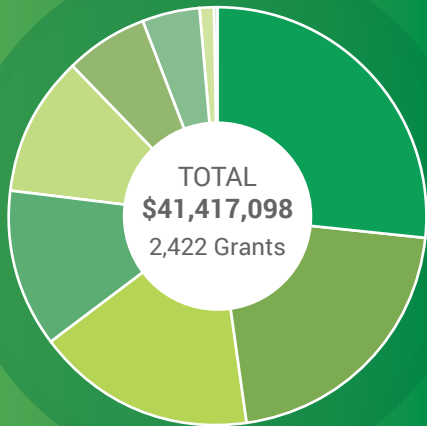
The CFMC is confirmed in compliance with National Standards for U.S. Community Foundations.



# GRANT Details



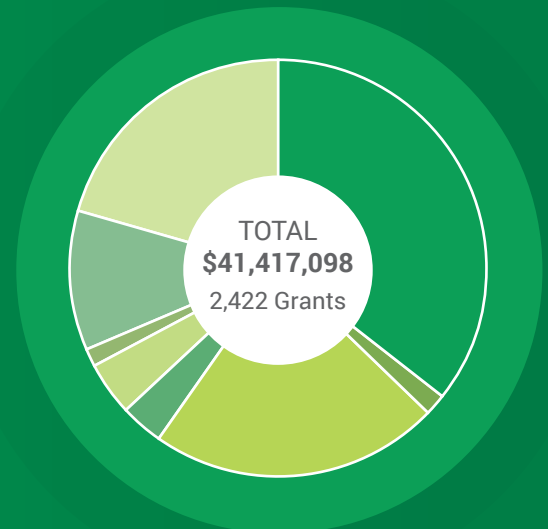
cfmco.org/Grants



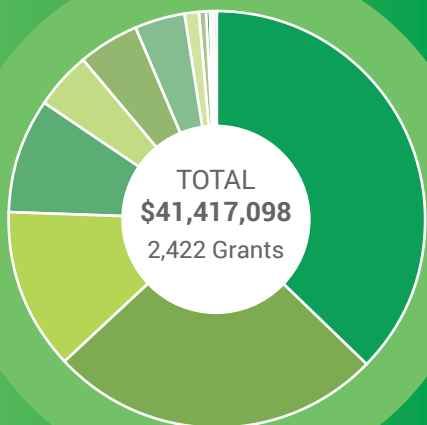
GRANTS BY PROGRAM AREA	AMOUNT	# GRANTS
Human Services	11,152,147	596
Public/Community Benefit Health	8,711,691	239
Education	7,037,990	224
Arts/Culture/Historic Preservation	4,967,425	743
Environment	4,543,195	276
Animal Welfare	2,682,012	163
Religion Related	1,838,120	76
International & Foreign Affairs	402,282	60
<b>TOTAL</b>	<b>82,235</b>	<b>45</b>
<b>TOTAL</b>	<b>\$41,417,098</b>	<b>2,422</b>

## GRANTS BY REGION

	AMOUNT	# GRANTS
Countywide	\$14,759,473	556
Monterey Peninsula	756,761	40
Salinas/Salinas Valley	9,248,453	290
Big Sur Area	1,388,703	55
Castroville & North	1,726,010	73
Multiple Areas	609,374	37
Outside Monterey County	4,471,997	866
Carmel Valley Area	8,456,327	505
<b>TOTAL</b>	<b>\$41,417,098</b>	<b>2,422</b>



29



GRANTS BY TYPE	AMOUNT	# GRANTS
Donor Advised	\$15,421,052	1,203
MC Gives! Campaign	10,755,459	203
Restricted Fund	5,123,894	216
Discretionary	3,731,034	105
Special Project	1,882,589	18
Scholarships & Awards	1,954,282	467
Community Impact	1,583,762	66
Field of Interest	489,485	31
Opportunity & Neighborhood	164,900	14
Affiliate Funds	137,013	44
Organizational Development	89,580	14
Pass Thru/Temporary	84,049	41
<b>TOTAL</b>	<b>\$41,417,098</b>	<b>2,422</b>



# LEADERSHIP

## 2024 Board of Directors

**Kirk Gafill (Chair)**

President/Chief Financial Officer  
Nepenthe/Phoenix Corporation

**Elsa Mendoza Jimenez (Vice Chair)**

Director Health Services  
Monterey County Health  
Department

**Jesse Lopez (Treasurer)**

CPA, Managing Partner  
Bianchi, Kasavan & Pope, LLP

**Kathleen Lee (Secretary)**

Executive Director  
Pebble Beach Company Foundation

**Dr. Rolando Cabrera**

Medical Director  
La Gloria Medical Clinic

**Mary Claypool**

Owner  
Claypool Consulting

**Robert Cullen**

Owner  
Robert Cullen Insurance & Financial  
Services Agency

**Deneen Guss**

County Superintendent of Schools  
Monterey County Office of  
Education

**Romero Jalomo**

Vice President Student Affairs  
Hartnell College

**Giff Lehman**

Founding Partner  
Integris Wealth Management  
(Retired)

**Adriana Melgoza**

Familias Con Mas Director  
Ventures

**René Mendez**

City Manager  
City of Salinas

**Larry Oda**

Community Volunteer  
Former JACL National President

**Colby Pereira**

Chief Operating Officer  
Braga Fresh Family Farms

**Joe Pezzini**

Senior Director of Ag Operations  
Taylor Farms

**Francine Rodd**

Executive Director  
First 5 Monterey County

**Julie Roth**

Wealth Manager  
Monterey Private Wealth

**Jennifer Walker**

Attorney and Shareholder  
Leach & Walker, a Professional  
Corporation

**Tyler Williamson**

Monterey City Mayor

**We thank those board members  
whose terms ended in 2023, for their  
years of dedicated service.**

Loren Steck  
Abby Taylor-Silva  
Jan Vanderbilt

(l to r): Kirk Gafill (Chair), Elsa Mendoza Jimenez (Vice Chair), Jesse Lopez, CPA (Treasurer), Kathleen Lee (Secretary), Dr. Rolando Cabrera, Mary Claypool, Robert Cullen, Deneen Guss, Romero Jalomo, Giff Lehman, Adriana Melgoza, René Mendez, Larry Oda, Colby Pereira, Joe Pezzini, Francine Rodd, Julie Roth, Jennifer Walker, Tyler Williamson





Richard Green

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

31

## 2024 Staff

**Jessica Alcantar-Tinajero**  
Grants and Office Coordinator

**Dan Baldwin**  
President/CEO

**Chalet Booker**  
Administrative Specialist

**Michael Castro**  
Director of Community Initiatives  
and Partnerships

**Christine Dawson**  
Senior Vice President Philanthropic  
Services

**Gina Delli-Gatti**  
Communications Officer

**Kim Drabner**  
Vice President of Finance and  
Human Resources

**Sarah Elias**  
Senior Accountant

**Daniel Faith**  
Director of Finance

**Esther Figueroa**  
Scholarships and Community  
Impact Officer

**Karina Gutierrez-Barboza**  
Grants and Data Manager

**Maria Hauman**  
Director of Operations

**Joel Hernandez Laguna**  
Community Impact and Equity  
Manager

**Amanda Holder**  
Director of Communications

**Laurel Lee-Alexander**  
Vice President of Community Impact

**Jakie Marquez**  
Philanthropic Services and  
Scholarships Assistant

**Jasmine Menor**  
Philanthropic Services and Events  
Coordinator

**Vanessa Miranda**  
Administrative Coordinator

**Reid Norris**  
Leadership Development Specialist,  
Center for Nonprofit Excellence

**Susie Polnaszek**  
Director, 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**  
Senior Accountant

**Nick Zafiratos**  
COAD (Community Organizations  
Active in Disaster) Manager

# GRATITUDE 2023 Committees

## BOARD COMMITTEES

### Executive Committee

Kirk Gafill (Chair), Elsa Mendoza Jimenez, Giff Lehman, Jesse Lopez, Joe Pezzini, Francine Rodd, Loren Steck

### Audit Committee

Loren Steck (Chair), Kirk Gafill, Larry Oda, Jan Vanderbilt

### Community Impact

Francine Rodd (Chair), Kirk Gafill, Romero Jalomo, Kathleen Lee, Adriana Melgoza, René Mendez, Colby Pereira

### Community Impact Investment

Loren Steck (Chair), Kirk Gafill, Nolan Kennedy, Giff Lehman, Abby Taylor-Silva, Bill Tebbe, John Tilley, Jan Vanderbilt, Tyller Williamson

### Diversity Equity

### Inclusion Work Group

Abby Taylor-Silva (Chair), Kirk Gafill, Elsa Mendoza Jimenez, Adriana Melgoza, Larry Oda, Francine Rodd

## Endowment Stewardship

Jennifer Walker (Chair), Greg Chilton, Kirk Gafill, Elsa Mendoza Jimenez, Loren Steck

### Finance

Jesse Lopez (Chair), Kirk Gafill, Joe Pezzini, Jan Vanderbilt, David Warner

### Governance

Elsa Mendoza Jimenez (Chair), Kirk Gafill, Deneen Guss, Abby Taylor-Silva

### Investment

Giff Lehman (Chair), David Benjamin, Bill Doolittle, Kirk Gafill, Craig Johnson, Jesse Lopez, Julie Roth, Bill Sharpe, Loren Steck

### Philanthropic Services

Joe Pezzini (Chair), Kirk Gafill, Kathleen Lee, Larry Oda, Hansen Reed, Jennifer Walker

### ADVISORY

### COMMITTEES

### CNE Advisor Circle

Staci Alziebler-Perkins, Stacie Andrews, Colleen Bailey, Ida Lopez Chan, Lauren DaSilva,

Steve Dennis, Steve Friedlander (*In memoriam*),

Ron Johnson, Gabriela López Chávez, Corey Madden, Kate Mitchell Mehle

### Community Impact Grant Subcommittee

Romero Jalomo (Co-Chair), Francine Rodd, (Co-Chair),

Dr. Celia Barberena, Kathie Cain, Meg Clovis, Laura

Gamble, Deneen Guss, René Mendez, Colby Pereira, John Scourkes

### Community Fund for Carmel Valley Advisory Council

Alondra Klemek (Chair), Cayton Avilla, Nick Craft, Alan Crockett, Teresa Goldberg, Joseph Hertlein, Jessica Kent, Tammi Lyon, Peter Meckel, Jacob Odello, Anne-Marie Rosen, Nicole Saulnier

### Northern Monterey County Foundation Advisory Council

Chuck Allen (Chair), Glen Alameda, Lance Batistich, Ricky

Cabrera, Don Chapin, Glen Church, Kathy Genasci, Anne Herendeen, Nick Kambic, Karen Miller, John Phillips, Brian Smith, Danielle Vierra

### Scholarships

Betsy Buchalter Adler, Dr. Cecilia Barberena, Susan Dooley, Daniella Kuska, Eric Mora, Steffanie Gamecho

### Siembra Latinos Fund Advisory Council

Ida Lopez Chan (Co-Chair), Lorraine Yglesias-Rice (Co-Chair), Alexis Arrazola, Jose Arreola, Lluvia Del Rio, Louie (Luis) Diaz-Infante, Elsa Mendoza Jimenez, Martha Zepeda

### Southern Monterey County Foundation Advisory Council

Oscar Avalos (Chair), Grace Borzini, Ryan Casey, Robert Cullen, Chris Graveline, Michel Hardoy, Erin King, Anita McKean, Lynnne Oliveira, Betsy Roth, Tom Shepherd, Teri Umbarger,

## Carlos Victoria Robert and Virginia Stanton Endowment Committee

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

### Big Sur Fund in Memory of Weston Call Advisory Council

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

### Women's Fund Leadership Advisory Council

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

## In Memoriam



**Tony Ayres**  
Legacy Society



**Ruth Hartmann**  
Legacy Society



**Donna H. Reid**  
Legacy Society



**Peter Brooks**  
Fund Holder



**Frank Keith**  
Fund Holder



**The Honorable Mr. Raymond Simmons**  
Former CFMC Board Member



**Howard Evans**  
Fund Holder



**Ruth McClendon**  
Fund Holder



**Fred Terman**  
Fund Holder



# CONNECT

## PARTNER WITH US

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

## START A FUND - It's simple:

### 1 CREATE

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

### 2 CHOOSE

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

### 3 GIVE

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

# THANK YOU!

Our accomplishments are only made possible through your support.



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

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



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



Chris Burhnam

## 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.





*Here for Good*

**Community Foundation**  
for Monterey County

2354 Garden Road, Monterey, CA 93940

# HEALTHY, SAFE, VIBRANT COMMUNITIES



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