

Giving Matters

SPRING 2024

COMMUNITY FOUNDATION FOR MONTEREY COUNTY NEWS



Here for Good
Community Foundation
for Monterey County

Annual Grants Surpass \$41 Million

Thanks to caring individuals, families and businesses, the Community Foundation for Monterey County (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.

“The power of local philanthropy continually inspires us,” said Dan Baldwin, CFMC President/CEO. “We’re honored to help people make a positive and lasting impact through their giving.”

— Dan Baldwin, President/CEO

More than \$15 million of the total grants came from donor advised funds, through which people support a wide range of causes. Proceeds from the annual Monterey County Gives! campaign accounted for \$10.9 million of the total. Monterey



CFMC grantee Greenfield Community Science Workshop

County Gives! is a partnership of the Monterey County Weekly, the CFMC and the Monterey Peninsula Foundation.

The CFMC granted over \$2 million through the Monterey County Storm Relief Fund in response to winter storms and the Pajaro levee breach. More than \$2 million in scholarships helped create opportunity for 495 local students and \$1.5 million was distributed through Community Impact grants, fueled by the CFMC's Fund for Monterey County.

Donors can partner with the CFMC to enhance their philanthropy by creating charitable funds, establishing life income gifts and including the Community Foundation as part of their estate. Learn more at cfmco.org/waystogive.

SIEDI Program Extended



Partners shared progress at the SIEDI convening in October

The Salinas Inclusive Economic Development Initiative (SIEDI) has made a difference working and advocating for family sustaining jobs and a more inclusive and equitable economy for the communities of the Salinas Valley. Thanks to a generous \$3,350,000 million grant from The James Irvine Foundation the program will continue.

“We are thrilled and grateful to announce that SIEDI has been renewed for another two years! This will enable us to continue our work with renewed enthusiasm and impact. We extend our thanks to The James Irvine Foundation and look forward to continuing this important work,” said Michael Castro, Director of Community Initiatives and Partnerships.

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President's Message Best Year Yet

It seems that in the blink of an eye we've moved through the first quarter of 2024. The ever-accelerating pace of life and work makes it easy to forget the accomplishments of the year that just ended. Some reflection is due.

By all measures 2023 was a remarkable year at the Community Foundation for Monterey County. We had historic highs in grants and gifts, but more importantly were present in so many ways across our county.

The storms of early 2023, combined with the levee breach in Pajaro, again activated our role in disaster philanthropy. Monterey County donors responded generously and the CFMC was able to grant more than \$2 million to support the nonprofits working directly with affected families. Through many fires, a pandemic and now a flood, the CFMC has become the trusted philanthropic partner when disaster strikes. Understanding we'd much prefer these events not occur, the CFMC approaches its role with a deep sense of responsibility.

“We had historic highs in grants and gifts, but more importantly were present in so many ways across our county.” – Dan Baldwin

The COVID-19 Collaborative pivoted to the Community Wellness Collaborative (CWC), an effort focused on mental health. The methodology that proved so effective during the pandemic is being applied to the CWC. A broad cohort of mental health providers is working toward more collaboration and identifying gaps in service delivery.



President/CEO Dan Baldwin gives a Community Foundation update at the 2024 Legacy Society Luncheon

The Salinas Inclusive Economic Development Initiative, a project funded by the James Irvine Foundation, successfully completed its second year. Nine nonprofits went through a rigorous program that supported their own capacity building, developing skill sets that allow them and the people they serve to be strong participants in the Monterey County economy.

We can't recall 2023 without citing Monterey County Gives! MC Gives! has carved out a powerful identity in year-end giving. A partnership of the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation, we are continually amazed at the year-over-year growth. The 2023 campaign set yet another record with nearly \$12 million raised through more than 8,000 donors. The CFMC is committed to making philanthropy accessible to anyone with a desire to participate. MC Gives! receives gifts large and small, and the 200 nonprofits in the program not only receive a significant grant but get introduced to new donors. Many thanks to our many partners who contributed to the overall match.

It's hard to imagine this year will top last, but then we say that every year.

Monterey County Gives! Raises \$11.9 Million



Monterey County Gives! once again shined a spotlight on the enduring generosity and commitment of our community towards local nonprofits. From November 9 to December 31, 2023, more than 8,000 people came together to donate \$11.93 million. Giving supported over 200 nonprofits serving Monterey County in focus areas including animals; arts & culture; community & social service; education & youth; environment & sustainability and health, wellness & food. Better yet, participating nonprofits receive a pro rata match provided by donors to a matching fund.

The CFMC is proud to partner on this local giving platform, described as “online shopping for your favorite nonprofits,” that invites everyone to be a philanthropist.

Since 2009, MC Gives! has raised and granted more than \$67 million to hundreds of Monterey County nonprofits. Learn more at mcgives.com.

MC GIVES!

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 an anonymous donor for their generous support of the matching fund.

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for Monterey County

MONTEREY COUNTY
WEEKLY
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Legacy Society Luncheon Returns

On February 29, 2024, the first Legacy Society Luncheon since 2020 took place at the Inn at Spanish Bay. The luncheon honors the CFMC's Legacy Society members, those who have made the important decision to include the Foundation in their estate plans.

More than 200 guests enjoyed the luncheon and program. CFMC Board Chair Kirk Gafill welcomed guests followed by Dan Baldwin who shared 2023 Foundation highlights. Attorney Nick Fantl with Johnson, Fantl & Aulenta, LLP spoke about the benefits of gift planning and Christine Dawson shared the peace of mind that comes with legacy giving in partnership with the Foundation.

There are many ways to become a Legacy Society member including: a bequest through a will or trust, life income gift such as Charitable Gift Annuity or Charitable Remainder Trust, designating the CFMC as a beneficiary of a retirement plan, IRA or life insurance or creating an endowed fund. If you have included the CFMC in your estate planning, please contact us so we may recognize your generosity. Legacy Society members may also choose to remain anonymous. Contact Cecilia Romero at (831) 375-9712 to learn more or visit cfmco.org/Legacy.

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Wine provided by



(l to r) Legacy Society Luncheon guests: Annette Yee Steck, Jeanne and Ed Gavrin, Loren Steck, Alan Crockett



(at left) Beth and Joe Heston



(above) Pam and Giff Lehman

(at left) Meredith and Kirk Gafill, Kathleen Lee

Community Fund for Carmel Valley Grants

The Community Fund for Carmel Valley (CFCV) was created to offer residents, businesses and organizations an opportunity to contribute to the greater good of others in Carmel Valley. Gifts to the fund support both annual grantmaking and an endowment, a permanent dedicated philanthropic resource for future generations of Carmel Valley and Cachagua residents.

The CFCV granted \$27,000 in response to the 2023 floods and an additional \$24,500 through its 2023 annual grantmaking to ten nonprofits focusing on projects and programs benefiting the communities surrounding Carmel Valley. Recipients included the Breast Cancer Assistance Group of the Monterey Peninsula; Cachagua Fire Protection District; Carmel Valley Art Association; Carmel Valley



Carmel Valley Art Association received a CFCV grant for free children's art workshops

Community Youth Center; Coastal Kids Home Care; Friends of Cachagua Children's Center; Meals on Wheels of the Monterey Peninsula, Inc.; Monterey Bay Power Over Parkinson's; The Regents of the University of California for Science Education; and the Tularcitos Parent Teacher Organization. "These nonprofit organizations enrich the lives of our community," said Alan Crockett, Advisory Council member.

Thanks to the generous donations received in 2023 through Monterey County Gives! (totaling more than \$81,000) and a partial match, the CFCV has been strengthened to be able to make an even greater impact in 2024 and beyond. The CFCV is an affiliate fund of the CFMC. Learn more at cfmco.org/CFCV.

CGAs: Income for Today, A Gift for Tomorrow



Francesca and Marty Wolf

“We will receive income for life, and we’re confident the Community Foundation will carry out our charitable legacy in the future.”

– Marty Wolf

A charitable gift annuity (CGA) is a great way for donors aged 65 and up to make a meaningful gift to their favorite nonprofit(s) and receive a fixed income stream for life. Rates increased on January 1, 2024 and are based on the donor's age at the time of the gift, ranging from 5.7% (for age 65) to 10.1% (for 90 and above).

In addition to the income stream, the individual or couple that set up the CGA may also be eligible to take a tax deduction at the time of the original gift. A portion of the payments received may also be tax-free for a time based on their life expectancy.

At the end of their life as well as their spouse's, if giving as a couple, the remainder of the gift will establish an endowed fund at the CFMC to benefit the donor's chosen nonprofit(s). A CGA is established through a simple contract agreement with the CFMC.

Sample Gift

On her 75th birthday, a donor reached out to the CFMC to establish a Charitable Gift Annuity. With a \$50,000 donation she will create a CGA with a 7% fixed return and:

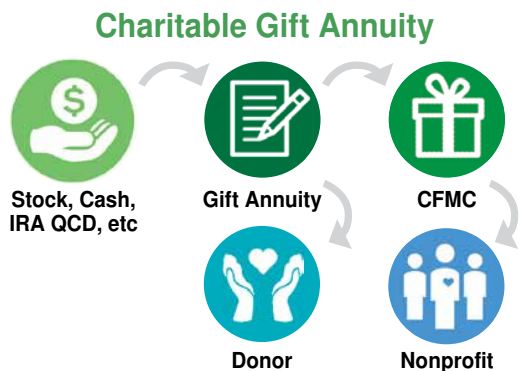
- receive an immediate income tax deduction of \$20,758
- receive \$3,500 fixed annual payment for life (\$2,359 of which is tax free)
- fund her charitable legacy by creating an endowed fund to benefit her favorite nonprofits
- may enjoy reduced probate costs and estate taxes



*\$2,359 is tax free for the first 12.4 years

Marty Wolf, a CFMC donor advised fund holder and Legacy Society member, established a CGA to benefit him and his wife, Francesca. The Wolfs enjoy payments for life and the remainder will benefit jazz and classical music education and performance. Read his story: cfmco.org/Wolf.

IRA Qualified Charitable Distributions & CGAs



Donors who are at least age 70½ at the time of the gift can make an IRA Qualified Charitable Distribution (QCD) to the CFMC to benefit the nonprofit(s) of their choice. The QCD will count toward the Required Minimum Distributions from their IRA without creating taxable income.

Under a new law effective in 2023, some donors over 70½ can make a QCD in exchange for a CGA. Some rules and limitations apply:

- Donors can exercise this option only once during their lifetime.
- There is an aggregate limit of \$53,000 for 2024.
- The donor's spouse can be included as a recipient of the annuity payment.
- Although there is no income tax deduction for this contribution, there is no tax on the QCD.

To explore these options and run custom scenarios, please call Cecilia Romero at (831) 375-9712 x124 or ceciliar@cfmco.org. Learn more cfmco.org/CGA.

The Ripple Effect

Drezner Family Scholarship Fund

Julie and Rob Drezner have always sought to make positive change. Julie, former VP of Community Impact at the CFMC, has her MSW and a passion for social justice and Rob has his PhD in psychology. Both used their careers and volunteering to make a difference.

“The ripple effect these scholars provide as they move forward with their careers will benefit their communities and families for years to come.” — Rob and Julie Drezner

After his retirement, Rob taught at Monterey Peninsula College and saw a spark in the students who wanted to further their education but didn't have the means. There was a pressing need for scholarship support specifically for students transferring to a four-year program.

With the generous support of their families, they created the Drezner Family Scholarship Fund in 2017 to benefit students



Julie (l) and Rob Drezner (r) at a Drezner Family Scholarship reception

“who want to make a positive difference in the lives of others and in their communities.” Since then, they have funded 35 scholars with up to \$10,000 for two-years of schooling and woven in a mentoring component to help with the transition.

Nearly all recipients are first-generation students. They aspire to be doctors, psychologists, educators, nurses, social workers, lawyers and affordable housing professionals. “This scholarship gave me the opportunity to focus on my education path and goals to make a difference as a positive role model for future generations,” said Annabel Negrete, B.A. Education, CSUMB. Read more and see student success stories: cfmco.org/Drezner.

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

Ingrid V. Bartels

Danny Bernstein and Leslie Steinway

Sharlene Erwin

Jeffrey Fowler

Brian and Carol LeNeve

Karin T. Locke

**Since October 2023*

To learn more, please contact Cecilia Romero at (831) 375-9712 x124 or visit cfmco.org/Legacy.

New Funds Established*

The CFMC holds more than 700 funds created by individuals, families and businesses. To establish or contribute to a fund, please visit cfmco.org/WaystoGive or contact Cecilia Romero at (831) 375-9712 x124 to learn more.

Agency Endowment

Friends of Andy Ausonio Library Endowment Fund

Agency Stewardship

Breast Cancer Assistance Group Stewardship Fund
Community Partnership for Youth Capital Fund
The Marina High School Stadium Capital Campaign
Soledad Community Center Capital Campaign

Donor Advised

Natalie and Eric Drobny Fund
The Peter and Erline Fichtner Charitable Fund
Bride Kiniry Family Foundation Fund
Montage Health Fund for Monterey County Teachers
Nahas Family Fund
Mimi and George Niesen Mostly Arts and Youth Fund
The Nunes Company Fund



The Soledad Community Center Capital Campaign Fund aims to upgrade and renovate the facility to enhance community wellbeing

Parker and Shapiro Family Fund
Spradling Family Giving Fund
Judy Williamson Fund
F.H. Woo Family Fund
Dave and Judi Zaches Charitable Foundation Fund

Scholarship and Award

Megan Reis Imagine Scholarship Fund
Taylor Farms SoCal Award Program

Special Purpose

The City of Soledad Recreational Fund
MPNFA Nanao Earthquake Relief Fund

**Since October 2023*

2024 LEAD Cohort Announced

The Center for Nonprofit Excellence (CNE) continues its investment in rising nonprofit talent through its LEAD Institute (Leadership, Education and Development) cohort, a year-long professional development program offered by the CNE to foster strong, effective leadership in the local nonprofit sector.



LEAD Institute 2024 cohort gathered in February at the Harden Foundation

"LEAD Institute combines in-person learning and professional coaching to provide new leaders with resources and skills they need to lead a thriving team, develop a network of peer support and work towards a more sustainable and equitable vision for our community. It's an investment in the LEADers, their organizations and their missions," said Reid Norris, Leadership Development Specialist, Center for Nonprofit Excellence.

LEAD is designed to maximize the leadership potential of capable nonprofit managers through monthly leadership and professional development seminars. The LEAD Institute emphasizes individualized professional growth by identifying core values and building resilience to address the opportunities and challenges facing the community. Participants gain new insights, abilities and a network of support to assume greater leadership roles.

The 2024 cohort features 21 nonprofit management professionals from diverse fields of nonprofit activity, including the arts, education, health and human services, from nonprofits based in Monterey, San Benito and Santa Cruz counties. They join a network of nearly 200 nonprofit leaders representing 132 nonprofits who have engaged with LEAD since it launched in 2009.

"LEAD has been a particularly impactful opportunity for multiple [CASA] staff members to build their own networks of trusted colleagues, refine their personal communication style and stories, tackle leadership challenges with great support and gain confidence in their own judgement. I have been thrilled to witness the increased confidence and clarity about leadership," said CASA Executive Director, Beth Wilber.

Learn more cfmco.org/LEAD.

Community Partnership for Youth Creates Capital Fund

Community Partnership for Youth (CPY) is a prevention program providing positive alternatives to gangs, drugs and violence while reinforcing individual strengths. Their vision is to provide local youth with a safe, structured environment that encourages healthy boundaries, positive self-esteem and the ability to make good choices for a full and successful life.

They recently created the Community Partnership for Youth Capital/Sustainability Fund and launched a \$1.5 million capital campaign. Their goal is to purchase their building to create the CPY Community Center and use the annual savings to expand their programs.

"Some of our kids go through so much trauma. Every day when we build on individual strengths and see lives changed we know we're doing the right thing," says Shari Hastey, Executive Director.

Learn more or give: cfmco.org/CPY.



CPY creates positive experiences for local youth

CFMC Welcomes New Board Members

The Community Foundation for Monterey County is pleased to announce the addition of **Dr. Rolando Cabrera**, **Mary Claypool** and **Robert Cullen** to its Board of Directors.



Dr. Rolando Cabrera is a physician with three decades of experience and broad support for his community. He is affiliated with Salinas Valley Health where he serves as a board member and

is the owner/medical director of La Gloria Medical Clinic located in Salinas. In addition to his strong focus on healthcare for the underserved, Dr. Cabrera supports his community in a range of other ways, including as founder and president of the Salinas Police Foundation and as a board member of the Key for a Cure Foundation.



Mary Claypool is the Owner of Claypool Consulting and currently serves as Trustee on the Monterey County Board of Education, Monterey County Civil Rights Commission and Monterey

County Branch of the NAACP. Previously, she worked for the City of Seaside for 20 years in finance, redevelopment, community

development and economic development, as well as for the County of Monterey for 16 years in economic development. Amongst her many awards and accolades, Mary received a Certificate of Special Congressional Recognition for outstanding and invaluable service and was recognized by the U.S. Department of Commerce, Economic Development Administration for Outstanding Service.



Robert Cullen owns and operates Robert Cullen Insurance & Financial Services Agency, holding a Real Estate Brokers license. He has served on the City Council for King City since 2008 and served as

Mayor from 2010 to 2016. In 2013, he helped form the Southern Monterey County Foundation (SMCF), an affiliate of CFMC. The SMCF has since granted more than \$200,000 to South County nonprofits improving the quality of life for local residents. Robert sits on several boards and volunteers his time to help with various fundraising activities.

2024 BOARD OF DIRECTORS

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SIEDI Program Extended, cont.

SIEDI supports partners as they engage with local economic development processes in ways that center the voices, assets and needs of the community.

The SIEDI Cohort consists of ALBA (Agriculture and Land-Based Training Association, Building Healthy Communities, CCA (Center for Community Advocacy), Centro Binacional Para El Desarrollo Indígena Oaxaqueño (CBDIO), Hijos del Sol, Loaves, Fishes & Computers, Monterey Bay Central Labor Council, Mujeres en Acción, and Rancho Cielo. Organizations use SIEDI funding to build their own capacity while also working collectively to advance SIEDI goals.

SIEDI is making its presence felt in many ways. It sent a delegation to learn about potential benefits and risks technology can have on agriculture. SIEDI leadership met with local and state politicians including Senator Anna Caballero and Congresswoman Zoe Lofgren.

SIEDI partners encouraged over 100 local residents to apply for a paid apprenticeship program with Joby Aviation to learn job skills. Building on this relationship, María Elena Manzo of Mujeres en Acción spoke at a State interview in support of Joby Aviation receiving a CalCompetes grant. Joby received a \$9.8 million grant which will benefit their Marina expansion and support over 690 jobs.

Learn more cfmco.org/SIEDI.



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(l to r) Michael and Gloria Ipson with Dan Baldwin at Legacy Society Luncheon

women's fund

of the community foundation
for monterey county

PLEASE JOIN US!

17TH ANNUAL

WOMEN'S FUND LUNCHEON

Friday, May 17, 2024

11:00 A.M. REGISTRATION & NETWORKING

12:00 P.M. PROGRAM

HYATT REGENCY MONTEREY HOTEL & SPA

The Power and Progress of Women



A conversation with

Morgane McNally

Resident Director
Merrill Wealth Management
The BMRB Group

Please join us Friday, May 17 when we come together for the 17th annual Women's Fund Luncheon to invest in local women and girls. Guest speaker Morgane McNally will talk about "The Power and Progress of Women" and we'll hear from a Girls' Health in Girls' Hands scholarship recipient.

Feel the energy in the room with more than 500 people joining together to uplift the women and girls in our community.

\$75 per person

Sponsor a table of 10 for \$1,000

Additional Levels Available

give.cfmco.org/WomensFund2024

Questions? (831) 375-9712 x110 • events@cfmco.org

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