



The Power of Giving: **\$44 Million Granted**

The Community Foundation for Monterey County (CFMC) creates positive, lasting change. Thanks to the generosity of thousands of donors, in 2024 the CFMC granted a record-breaking \$44.4 million, supporting vital programs and services across Monterey County and beyond.

This includes \$11.9 million from the 2023 Monterey County Gives! campaign, \$9.7 million from our donor advised funds, \$1.9 million in Pajaro Community Grants (below), \$1.8 million in scholarships and \$2.1 million in application-based grants, such as our Opportunity Grants program.



CFMC grants support programs and services creating healthy, safe, vibrant communities throughout Monterey County. Shown here: Palenke Arts' youth participants

Grant recipients Palenke Arts and Youth Arts Collective (see page 4) are just two of many nonprofits empowered by CFMC grants. Thanks to your support, hundreds of organizations continue to uplift our community—especially in challenging times.

Additionally, as we grow the Fund for Monterey County (made up of endowed unrestricted and field-of-interest funds), we are expanding our ability to respond to evolving needs and create a stronger, more resilient future. We deeply appreciate the support that makes this possible and look forward to continuing this powerful work together.

Pajaro Community Grants Awarded



Pajaro Middle School students plant citrus trees and native plants in raised beds on campus (Watsonville Wetlands Watch)

In December 2024, the CFMC distributed nearly \$1.9 million through the Pajaro Community Grants Program. Grants were made possible by California Storm Relief Funds (Assembly Bill 102) allocated by the County of Monterey. We established a volunteer grant committee comprised

of a Pajaro business representative, a County of Monterey representative, County Supervisor Glenn Church and three community residents, including a youth resident, to review applications and provide recommendations.

This program awarded grants to 22 organizations to increase the ability of the community to prepare for, respond to and recover from emergencies and natural disasters. The CFMC is producing a report in English and Spanish to share with Pajaro residents outlining the important work that will be done along with the contact information of grant recipient organizations.

Watsonville Wetlands Watch received a Pajaro Community grant to build resilience to climate change. Jonathan Pilch, Executive Director, notes, "Planting trees and installing edible gardens, orchards and native plants creates a healthier learning environment. Increasing the tree canopy cover is a powerful tool to create a healthier environment for the Pajaro community that is resilient to the impacts of climate change and extreme heat."

President's Message

Creating Positive Impact

Each Spring this note reflects on a robust year at the CFMC. This means year-over-year gifts and grants continue to grow, fueling our impact. This happened again in 2024. We were the recipient of an amazing \$80 million in gifts and proudly granted \$44 million. Our second year-end Here for Good campaign surpassed year one in its support of the greater work of the CFMC. Never abandoning our core role of building and distributing charitable funds, our work has expanded, and it is very rewarding to see this embraced and supported by our donors.

“The real heroes are all of you.”
— Dan Baldwin, President/CEO

But at the end of the day, helping to implement the philanthropic vision of our donors, transitioning assets into grants, partnering with a major funder on major projects like the Salinas Inclusive Economic Development Initiative, watching the CNE's LEAD program continue to grow, \$1.8 million in scholarships, all the work at the CFMC is in service to supporting and uplifting the residents of Monterey County. This can be through food programs, the arts, preserving the environment, legal assistance, access to health care...it's a long a list. Every one of these program areas plays an important role in the health and vibrancy of our community.

Perhaps no other program epitomizes the spirit of philanthropy like Monterey County Gives! I'm sincere

when I say we make no predictions MC Gives! will continue to grow. However, that's exactly what it does. It crept over \$11 million in 2022, jumped to \$11.9 million in 2023, then skipped over twelve and thirteen, landing on \$14.27 million in 2024. This

partnership between the CFMC, Monterey County Weekly and the Monterey Peninsula Foundation, along with several generous sponsors who provide support to the match fund, has raised and granted \$82 million since 2010, \$54.8 million since the 2020 campaign. While tremendous credit goes to the nonprofits that participate in MC Gives! and their growing expertise at describing their work and encouraging donors to provide support, the real heroes are all of you. MC Gives! is a clear demonstration of the remarkable culture of giving in Monterey County.

2025 is off and running. While I'm sure next year's Spring message will describe a remarkable year, we must acknowledge it is a time of uncertainty for many of our neighbors. The CFMC, its board of directors and staff, remain diligent in our desire to create positive impact.



President/CEO Dan Baldwin gives a Community Foundation update at the 2025 Legacy Society Luncheon

MONTEREY COUNTY **GIVES!**

Joining Together for Big Ideas

Monterey County Gives! 2024 was another record-breaking success, rallying community support to fund vital nonprofit initiatives across the county. Gives! continued its mission of strengthening local organizations through collective generosity.

This year, the campaign raised \$14.27 million for more than two hundred local nonprofits in areas such as environmental conservation, education, health services, youth programs and social justice. Donations were amplified by matching gifts and challenge grants, inspiring donors to maximize their impact.

continued on page 3





SIEDI

In 2024, SIEDI (Salinas Inclusive Economic

Development Initiative) was renewed for another two years through a generous \$3.35 million grant from The James Irvine Foundation. SIEDI Part 2 builds on the original effort by focusing on fostering economic equity and opportunities for historically underserved communities in Salinas.

The initiative works to increase the number of family-sustaining, good jobs in Salinas and strengthen nonprofits and the Community Foundation's ability to engage in inclusive economic development efforts.

SIEDI Part 2 is now in full swing and aims to create long-term economic stability and greater prosperity for all Salinas residents. Partners are collaborating on implementing community-driven economic development practices, identifying current capacity-building needs and opportunities and establishing a shared vision and priorities.

SIEDI is a collaboration between local organizations, businesses and government agencies to create a more inclusive and sustainable economy. The success so far demonstrates the impact that can be made by deep, consistent investment in our community leaders.

SIEDI: Investing in Collaboration



SIEDI Program expands efforts

SIEDI funded organizations include:

Agriculture and Land-Based Training Association (ALBA), Building Healthy Communities (BHC), Center for Community Advocacy (CCA), Centro Binacional Para El Desarrollo Indígena Oaxaqueño (CBDIO), COPA (Communities Organized for Relational Power in Action), Digital NEST, Hijos del Sol, LFC (Loaves, Fishes & Computers), Monterey Bay Central Labor Council, Mujeres en Acción, New Hope Baptist Church and Rancho Cielo.

“ Thanks to SIEDI, Ag Industry employers are seizing the opportunity to connect with talented, driven youth from our community at our Employer Mixers.

— SIEDI Participant Jacob Ayon, Digital NEST

Partner organizations include the Institute for Social Transformation at UC Santa Cruz (UCSC), the Everett Program for Global Information and Social Entrepreneurship, First 5 Monterey County and Hartnell Community College.

To learn more, visit: cfmco.org/SIEDI.



Monterey County Gives! continued from page 2

MC Gives! continued to highlight the power of community-driven philanthropy, demonstrating how small contributions add up to significant change. Monterey County Gives! once again proved to be a cornerstone of local giving, helping nonprofits expand their reach and improve lives throughout the region.

Monterey County Gives! is a special project of the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation. Special thanks to 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, Post Ranch Inn, MST, CFMC donor advisors and two anonymous donors for their generous support of the match.



Small Grants – Big Impact

For over a decade, the CFMC made small (\$5,000) grants to emerging organizations and for one-time, unexpected programs or collaborative opportunities. Most years, the Foundation awarded 10 of these Opportunity grants annually. Due to the COVID-19 pandemic and other factors, applications slowed and there were only three grants in 2023.

The CFMC connected with more than 100 local nonprofit providers for feedback. Responding to nonprofit leaders' comments and concerns, the Foundation combined the Community Impact grants under \$20,000 and Opportunity grant programs. CFMC now accepts Small grant proposals between January and October.

Youth Arts Collective (YAC) received an Opportunity Grant in 2024 for its after-school arts and mentorship program. YAC is a safe space for young artists to grow and learn, serving local youth (ages 14-22) by bridging the gap left by traditional education and home environments. YAC's studio space serves as a sanctuary for creative expression, mentorship and collaboration. Its Executive Director and other staff are alumni of the group, passing on YAC's values of fostering artistic growth, cultivating life skills and promoting emotional well-being.



Youth Arts Collective inspires young artists

YAC serves nearly 80 youth annually, hailing from ten cities throughout the County, of which 68% identifies as LGBTQ+. Through these positive role models, encouragement and a growth mindset, youth are inspired to reach their potential. YAC's mission is "to inspire creativity, kindness, and confidence in our youth through artistic expression and mutual respect. Do art. Be kind."

Learn more at yacstudios.org.

The Legacy Society

Welcomes New Members

The Legacy Society is a group of visionary people who will create enduring impact by partnering with the Foundation in their estate plans. We thank these new members (since October 2024) for making this meaningful decision.

Anonymous

Michelle and Frank Knight

Diana Martinetto

Liza Moe

Susan Wolfe

To learn more and see the full list, visit cfmco.org/Legacy.

New Funds Established*

The Community Foundation holds more than 800 charitable funds created by individuals, families and businesses. To create a fund or explore other ways to give, please contact Cecilia Romero, Director of Gift Planning at 831.375.9712 x124.

COMPANY

The Homer T. Hayward Lumber Company Fund

DONOR ADVISED

21 Gifting Fund

David and Carla Garnham Fund

Pat Grant DVM Charitable Fund

Andrew Horst Wolfe Fund

Adele P. Margolis Fund

McCully Hansen Johnson Family

Morgens West Fund

Rapa Trust Fund

Tyler Fund for the Performing Arts

SCHOLARSHIP

Bird Educational Scholarship Fund

Gruit Memorial International

Student College Scholarship Fund

EWJ Hitchcock Memorial Scholarship Fund

Legacy of Learning Jaroslav "Jerry" Stepanek Memorial Scholarship Fund
Ruelas Fulfilment Foundation Scholarship Fund

SPECIAL PURPOSE

Moss Landing Fire Relief Fund

**Since November 2024*



Scholarship fund holder Fabiola Ruelas (l) was honored as the Youth Philanthropist of the Year at the 2024 Philanthropy Day Luncheon, CFMC's Christine Dawson (r)



Partners in Giving – Giff and Pam Lehman

Giff and Pam Lehman brought their philanthropic journey to life at the February 26, 2025 Legacy of Giving Luncheon. The couple met at the Carnegie Mellon Tipper School of Business. They married after graduation, moved to NYC and raised their family, happily relocating to the Monterey Peninsula in 1997.

They began their partnership with the CFMC in 2016 by creating the Lehman Family Fund, a donor advised fund, in order to simplify their giving. They received an immediate tax deduction and enjoy recommending grants to their favorite causes. "It's just easy. We go online, and don't have to keep track. I know our fund is well-managed," says Giff. (Giff served as a CFMC board member from 2019-2024 and chaired the Foundation's Investment Committee for five years).

Later they were looking for a way to honor their long-time nanny, Casilda "Cassi" Paul, who was very involved in her church in Brooklyn and offered her heart and home to many friends and family, before passing away unexpectedly. "She was a real role model for philanthropy," says Pam. "We wanted to do something in her memory."

They created the Casilda Paul Memorial Scholarship Fund in 2021 to benefit children from Cassi's church and have awarded ten scholarships to students in all fields of



Pam and Giff Lehman shared their story of giving at the Legacy Luncheon



They are wonderful thought partners in refining our charitable vision.

— Giff and Pam Lehman

study. "The Foundation designed and executed a program that is small but meaningful to us. They truly are our partner in giving," noted Pam.

Giff spoke about their confidence the CFMC will carry out their wishes. "They are uniquely suited to facilitate complex distribution requirements. They are in the inspiring philanthropy business."

They've outlined their legacy giving plans in a Memorandum of Charitable Intent ("MOCI") to keep all their goals in one place. (Learn more below).

Giff shared that when the time comes, "all of our philanthropic assets will flow to the CFMC, including the creation of a donor advised fund for each of our two children. We consider this the gift of giving." For the remainder, they specified that the Foundation grant a percent each year to the charities they selected.

Giff summed it up this way. "We annually review our MOCI to make sure it still represents our charitable goals. It's easy to change if our vision changes. It can be as complex or as simple as you want it to be. The Community Foundation is just a huge professional resource. They are wonderful thought partners in refining our charitable vision. We have a lot to learn, but we have a great partner."

Read more: cfmco.org/Lehman.

Memorandum of Charitable Intent

The Memorandum of Charitable Intent (MOCI) is a valuable tool for people looking to create a lasting impact through philanthropy. This complimentary service of the CFMC creates a flexible document outlining a donor's charitable wishes for future distribution of their philanthropic assets.

When you name the Community Foundation for Monterey County as your charitable beneficiary, a MOCI ensures your philanthropic wishes are carried out exactly as you intend. A MOCI is adaptable, allowing donors to modify their giving preferences as priorities evolve without revising formal estate documents.

WHY CREATE A MOCI?

- **Easy & Flexible** – Whether directing gifts from your estate, will, trust or donor advised fund, a MOCI simplifies the process and allows for future updates at no cost.
- **Expert Guidance** – The CFMC team works with you and your professional advisors to create a customized plan that aligns with your charitable goals.



CNE Board Empowerment Program Launches



Engaged and effective boards of directors are critical to nonprofits' success. In early 2025, the Center for Nonprofit Excellence (CNE) began the Board Empowerment Program, a pilot effort to strengthen the organizational impact of 12 vital Monterey County nonprofits through

effective and empowered board leadership.

This innovative opportunity combines a \$5,000 unrestricted grant with focused consulting, accountability and a learning cohort of other local nonprofits working on similar board projects facilitated by Dr. Lydia Hughes-Evans of Pure Momentum Consulting.

The Board Empowerment Program takes a unique approach in providing structured support to make meaningful changes in board structure, policy and governance. The program aims to embed lasting changes in nonprofits' culture and practices beyond the nine-month program. At its conclusion, the program will harvest the stories of organizational change and share these for the learning benefit of all.

CNE's 2025 Board Empowerment Program will be facilitated by Dr. Lydia Hughes-Evans of Pure Momentum Consulting



“We're looking forward to being a part of this program and working with the Foundation, Dr. Hughes-Evans, and the cohort!”

– Jennifer Ramirez, Executive Director of Partnership for Children

The inaugural organizations selected for this dynamic program are: **AI & Friends; Birth Network of Monterey County; Boys & Girls Clubs of Monterey County; Epicenter of Monterey; Everyone's Harvest; Foundation for Monterey County Free Libraries; Gathering for Women – Monterey; Independent Transportation Network Monterey County; NAMI Monterey County; Partnership for Children; Veterans Transition Center and Wonderwood Ranch.**

Support from the David and Lucile Packard Foundation makes this program possible. Donors to the CFMC Here for Good Fund also play a vital role in supporting CNE programs that grow staff and volunteer skills and knowledge needed to drive impactful change within their organizations and the broader community.



COAD Update

The public launch of the Monterey County COAD (Community Organizations Active in Disaster), an initiative of the Community Foundation for Monterey County, is set for First Quarter 2025, marking a significant step forward in community collaboration and disaster preparedness. Quarterly convenings are scheduled throughout the

year, offering valuable training sessions and readiness opportunities to strengthen local resilience.

In a recent demonstration of coordinated response, Vistra partnered with the Community Foundation to establish the Moss Landing Fire Relief fund to support households impacted by the January 16, 2025 fire at the Moss Landing Power Plant site. The Monterey County COAD coordinated distribution efforts for residents in the evacuation zone, assisted by partners from United Way Monterey County and the Castro Plaza Family Resource Center. 435 evacuated households received financial assistance via VISA gift cards, distributed over three days, showcasing the power of collective action in times of crisis.

Learn more at cfmco.org/COAD and follow @montereycountycoad for future updates and training opportunities.



COAD Manager, Nick Zafiratos coordinated the Moss Landing Fire Relief Fund gift card distribution



“Here for Good” Campaign Achieves Great Success

We are grateful to everyone who supported the 2024 Here for Good Campaign. With generous contributions from 118 donors, we raised over \$540,000 to enhance the Foundation's ability to address critical community needs. Special thanks to Bertie Elliott, CFMC fund holder and former Board Chair, for her generous \$100,000 challenge gift, which increased the impact of each donation.

Your support strengthens our communities by empowering leadership on key issues, responding to disasters and assisting local nonprofits through the Center for Nonprofit Excellence. Contributions to the Here for Good Fund are always welcome throughout the year. To learn more or make a gift, visit cfmco.org/HereforGood.

2024 Here for Good CAMPAIGN



The Here for Good Fund supports the work of the Community Foundation to create healthy, safe, vibrant communities.

Memorandum of Charitable Intent continued from page 5

- **Peace of Mind** – We periodically check in with you to ensure your MOCI reflects your evolving philanthropic interests.

It's a meaningful process that helps you structure your charitable giving to align with your values and long-term goals. You work with us to direct your gift to the causes and nonprofits that matter most to you and create a lasting impact. To learn more, please contact Cecilia Romero, Director of Gift Planning at 831.375.9712 x124 or visit cfmco.org/MOCI.

Website Redesigned: cfmco.org

The Community Foundation is pleased to announce our new website design. Created with simplicity in mind, there is easy to access information for donors looking for ways to give, nonprofit organizations accessing grant and workshop information, students seeking scholarships as well as advisors (CPAs, financial planners and estate attorneys) searching for charitable giving resources.

The website, redesigned by TMD Creative, offers a fresh look and feel, simplified navigation and a wealth of content. We invite you to explore cfmco.org and share your feedback via email to communications@cfmco.org.



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Inside

- CNE Launches Board Empowerment Program
- SIEDI and COAD Initiative Updates
- Partners in Giving – Giff and Pam Lehman
- New Funds Created



Board Chair Elsa Mendoza Jimenez and
Dan Baldwin at Legacy Society Luncheon

18th Annual Women's Fund Luncheon Friday, May 16, 2025

Hyatt Regency Monterey Hotel & Spa
11:00 a.m. Networking Reception
12-1:30 p.m. Program & Luncheon

DIAMOND SPONSORS

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See all sponsors:
cfmco.org/WomensFund

SPECIAL
THANKS



Fleurs du Soleil



**Strength.
Resiliency. Hope.**

**A conversation with Artist & Author,
René Romero Schuler**

The Women's Fund invests in women and girls now
for a better future for us all.

Please join us Friday, May 16, 2025 for the 18th annual Women's Fund Luncheon at the Hyatt Regency Monterey Hotel & Spa. Nearly 600 people come together at this signature event to enjoy networking and an inspiring program to benefit local women and girls. The theme this year is "Strength, Resiliency, Hope" and the program will feature a scholarship speaker as well as a conversation with artist and author René Romero Schuler and Senior Vice President of Philanthropic Services, Christine Dawson.

To secure your tickets or become a sponsor
visit give.cfmco.org/WomensFund2025.

For sponsorship information,
please contact 831.375.9712 x110.



Join Us!