



GROW. GRANT. LEAD.





Here for Good
**Community
Foundation**
for Monterey County

Mission

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

Vision

Healthy, Safe, Vibrant Communities



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2024 *Fast Facts*

\$44.4 million

Granted through 3,091 Grants

\$420.2 million

Total Assets

\$59.6 million

Charitable Gifts Received

\$14.2 million

Raised for 206 Nonprofits through Monterey County Gives!

\$1.8 million

Awarded in 493 Scholarships

45

New Funds Established

Message to the Community

Grow. Grant. Lead.

Grow. Grant. Lead. It sounds so simple. This year's annual report theme distills the overall work of the Community Foundation for Monterey County (CFMC) into easily understandable concepts. But, as you might imagine, what lies under the surface is much more complicated.

Why "Grow. Grant. Lead."?

"Grow" represents aligning with donors who might come to us to start a donor advised fund, talk about their charitable estate plan, and often both. These relationships build the assets that fuel impactful grantmaking. All of our published data points lead with grantmaking, but those totals and the lives they improve aren't possible without charitable assets placed here by donors who want to make a difference in Monterey County. We had record gifts in 2024. These gifts will support grantmaking for years to come.

"Grant" is the most public part of the CFMC. 2024 saw record grant totals. Whether it's our application-based Impact Grants from the Fund for Monterey County, donor advised grants, scholarships, grants from funds formed through estates that name specific nonprofit grantees or Monterey County Gives!, the CFMC's commitment to this core purpose is unwavering. Grants support arts programming, protect the environment, provide access to healthcare, help children learn to read, respond to disasters, protect families from domestic violence, care for the elderly and work with the unhoused. Our belief is that locally focused, targeted grantmaking is a hallmark of the CFMC and what makes us unique as a nonprofit.

"Lead" has become a growing part of the CFMC's identity. We embrace this role and the responsibility that comes with it. Whether it is facilitating a philanthropic response to disasters (you'll read about our newly formed COAD in this report), convening the private/public/governmental sectors during the pandemic, making capital campaign loans through our Community Impact Investment program, implementing programs like the Salinas Inclusive Economic Development Initiative or building best practices in nonprofits through our Center for Nonprofit Excellence, we assist nonprofits and Monterey County's many communities by bringing our trusted expertise to a variety of ongoing issues.

The real power of "Grow. Grant. Lead." is that these efforts complement each other. Grantmaking and leadership inspire partnerships, which leads to continued growth. Growth builds resources for greater grantmaking and leadership, driving impact that attracts more growth. And so on. All is in service to the people of Monterey County.

We are proudly **Here for Good.**



Kirk Gafill
2024 Board Chair



Daniel R. Baldwin
President/CEO



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The real power of "Grow. Grant. Lead." is that these efforts complement each other. Grantmaking and leadership inspire partnerships, which leads to continued growth. Growth builds resources for greater grantmaking and leadership, driving impact that attracts more growth.

Dan Baldwin

(l to r) Dan Baldwin and Kirk Gafill at the 2024 Celebration of Philanthropy

Community Leadership

Building Thriving Communities

The CFMC is growing in its role as a community leader, working to bring people, nonprofits and resources together to tackle critical challenges such as homelessness, affordable housing and mental health.

These efforts often result in collaborative initiatives, such as the COVID-19 Collaborative, which the Community Foundation created and led in 2020. The Collaborative was a cross-sector countywide effort to identify and coordinate action around key priorities.

Additional examples include the VIDA (Virus Integrated Distribution of Aid) Program for Community Health Workers and the Community Wellness Collaborative, which focused on mental health support throughout the county.

The CFMC also acts as a philanthropic first responder during times of disaster. It has quickly responded to natural disasters, establishing funds like the Monterey County Fire Relief and Monterey County Storm Relief Funds, distributing millions of dollars in aid to nonprofits assisting those affected.

The Community Foundation's leadership extends beyond grantmaking, with key programmatic initiatives like the Salinas Inclusive Economic Development Initiative (SIEDI). This initiative is focused on advocating for and creating family-sustaining jobs in the Salinas Valley (see page 9).

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The Community Foundation's leadership extends beyond grantmaking.

Dan Baldwin



President/CEO Dan Baldwin speaking at the Farmworker Resource Center Program Recognition Ceremony honoring our partners and Community Health Workers

Another example of the Community Foundation's commitment is the creation of the Monterey County COAD (Community Organizations Active in Disaster), which helps prepare local nonprofits and grassroots groups for future disasters (see page 8).

A core goal of the CFMC is to direct grants to achieve the greatest possible impact. In 2024, the Community Impact team led five listening sessions and reviewed research and over 15 reports to identify key community priorities. This process resulted in the identification of grant opportunities in four key focus areas: Housing Stability, Educational Advancement, Workforce Development and Mental Health Support. In 2025, the Foundation is inviting donors to co-invest in these priorities through THRIVE, a new grant program that aims to make a measurable impact through collaborative giving.

The Community Foundation remains dedicated to addressing complex community issues, working towards its vision of fostering healthy, safe, vibrant communities throughout Monterey County.

THRIVE

 for Good



cfmco.org/thrive

Grantmaking

Growing Impact

Grantmaking is central to the Community Foundation's mission **"to inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County."**

In 2024, through the collective generosity of our donors, we awarded more than \$44 million through 3,091 grants.

The CFMC's grantmaking efforts address a broad range of community needs. These include health and human services, children and youth development, arts and culture, historic preservation, education, environmental conservation, animal welfare and disaster relief (see page 29).

CFMC donor advisors directed more than \$11 million of the 2024 grantmaking to meaningful programs and projects. Donors to the annual Monterey County Gives! campaign contributed a record \$14.2 million in 2024, granted in 2025, continuing the cycle of giving and impact.

Through CFMC's application-based grant programs, we ensure grants are allocated to address pressing community needs. Each year, more than \$2 million is distributed through Impact Grants for both operating and programmatic support, as well as capacity-building improvements. Smaller grants are considered on a rolling basis, providing nonprofits with the flexibility to meet unanticipated or time-sensitive needs.

The Foundation has been entrusted to administer several Field of Interest Funds, each dedicated to specific causes described in the donors' estate plans. Grants provide vital support in areas such as aging services and employment readiness (Ken and Gundy DuVall Fund) and medical services for underinsured individuals (Dr. George & Sam Kih Thorngate Family Fund). We are honored to work alongside committed individuals, families and organizations to make a tangible difference in the lives of our neighbors.



cfmco.org/grants

(top to bottom) Salinas Valley Pride Celebrations, Greenfield Community Science Workshop and Friends of the Carmel Valley Library



Fast Facts →

\$44.4 million
granted

3,091
grants

\$1.8 million
in scholarships awarded

Grantmaking

Stories of Growth



Community Partnership for Youth

- **\$40,000 two-year grant for after-school mentor/tutor program**

Community Partnership for Youth (CPY) programming provides 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. CPY serves youth through after-school and summer programs that help instill self-esteem and respect for others. 550 children attend CPY's programs, including Afterschool Mentor-Tutor, Middle School and High School Leadership, Life Skills/Job Preparation and a Visual and Performing Arts Academy. In 2024, all CPY's mentors including those from other partner service organizations attended a mental health training offered by AIM for Mental Health locally. "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," said Shari Hastey, CPY Executive Director.



Centro Binacional para el Desarrollo Indigena Oaxaqueño (CBDIO)

- **\$50,000 two-year grant in support of Mixteco summer school**

CBDIO was "created by and for Indigenous communities in rural California to organize and make sure our communities' culture, languages and knowledge are recognized and respected by the systems and institutions that impact our lives." The group focuses on health access, education, indigenous youth development, language and cultural preservation and immigration. Its Mixteco after-school program at Santa Rita Elementary School in Salinas teaches students to read and write in the Mixtec language and engages them in cultural activities highlighting Indigenous music, art and foods. Thanks to advocacy efforts by local Mixteco parents who expressed a need for in-language services and support for their children, CBDIO also provides daily in-language assistance to Indigenous parents at schools in the district. CBDIO is a participant in the Foundation's SIEDI Initiative, working to build a more inclusive economy in the Salinas Valley (see page 9).



Point Lobos Foundation

- **\$60,000 two-year grant for climate change mitigation and education**

The mission of Point Lobos Foundation (PLF) is "to protect and nurture Point Lobos State Natural Reserve, to educate and inspire visitors to preserve its unique natural and cultural resources, and to strengthen the network of Carmel Area State Parks." Programming includes climate change mitigation efforts such as removing invasive plants and replanting native plants to allow a healthy forest to benefit the natural ecosystem. PLF plans to remove a minimum of 1,600 pounds of invasive weeds monthly. Volunteer docents receive training to educate county school students and other visitors about the effects of climate change and positive actions individuals can take.

Pajaro Community Grants

\$1.9 Million Awarded

The Community Foundation often facilitates one-time grant programs for a particular purpose. The County of Monterey recently partnered with the CFMC to provide grants for flood relief and resilience for Pajaro. Grants were made possible by County funding received from California Assembly Bill 102 in response to flooding from the Pajaro levee breach in 2023.

The CFMC created the Pajaro Community Grants Program and awarded \$1,893,000 to 22 organizations in December 2024.

Grants provide resources for those impacted by the storms, strengthening their recovery efforts. A volunteer grant committee reviewed applications and provided recommendations based on input from residents directly affected by the flooding.

Grant recipients like Catholic Charities of the Diocese of Monterey help build a more resilient Pajaro



“

These funds were meant for Pajaro, and the CFMC is proud to say Pajaro decided how they were used. The residents decided how they wanted to invest in their own community.

Michael Castro
Director of Community Initiatives and Partnerships

Pajaro Grant Recipients

- **ACTION Council of Monterey County**
Pajaro Community Resources, Economic Development and Language Access Program: \$50,000
- **Casa de la Cultura Center**
Community Center Improvements: \$100,000
- **Catholic Charities of the Diocese of Monterey**
Pajaro Resilience and Beautification Initiative: \$93,000
- **Center for Community Advocacy**
Tenants' Rights Advocacy and Education in Pajaro: \$50,000
- **Centro Binacional para el Desarrollo Indígena Oaxaqueño**
Building Indigenous Farmworker Resilience in Pajaro: \$50,000
- **Community Action Board of Santa Cruz County, Inc. (CAB)**
¡Orgullosamente Pajaro!: \$100,000
- **Community Agroecology Network (CAN)**
Food Aggregation and Distribution through Community Garden Renovation and Reconnection: \$50,000
- **Community Bridges**
Pajaro Rising: \$100,000
- **Hijos Del Sol Arts Productions**
Creating Connections Through Community Mural and Workshops: \$65,000
- **Loaves Fishes & Computers (LFC)**
Digital Equity for Resiliency for Pajaro's Business Owners and Seniors: \$100,000
- **Monterey Bay Economic Partnership**
Pajaro Business Group Incorporation and Resiliency Project: \$100,000
- **Pajaro Rescue Mission**
Pajaro Rescue Mission Program: \$100,000
- **Pajaro Valley Prevention & Student Assistance**
Juntos Sanando Comunidad \$200,000 (two grants)
- **Pajaro Valley Unified School District**
Reopening PVUSD's Healthy Start Center for a Resilient Pajaro: \$100,000
- **Salud Para La Gente**
Expanding Access to Care: \$100,000
- **Salvation Army - Monterey Peninsula Corps, Watsonville Corps**
Support Pajaro's unhoused population: \$5,000
- **Second Harvest Food Bank Santa Cruz County**
Food for Children and Families in Pajaro: \$100,000
- **Teeth for Life Scholarships**
Pajaro Valley Dental Relief Services: \$50,000
- **United Way Monterey County**
Increase childcare capacity and conduct family asset-building: \$80,000
- **Ventures**
Familias con Mas: \$100,000
- **Watsonville Law Center**
Pajaro Valley Legal Access: \$100,000
- **Watsonville Wetlands Watch**
Climate Resilient Pajaro Middle School Campus: \$100,000

Creating Opportunities

Scholarships

Many Monterey County students aspire to attend college, but the cost of higher education may keep them from achieving that dream. The Community Foundation for Monterey County works with generous individuals, families and businesses to help close the gap.

One application allows students to be matched with more than 85 potential scholarships they may qualify for. "These scholarships help create positive change and let students know people believe in them," said Esther Figueroa, CFMC Scholarships and Community Impact Manager.

CFMC scholarship funds are established by people who recognize the value of education and want to support students in achieving their potential. The CFMC manages 85 scholarship funds, and in 2024, the Foundation awarded more than \$1.8 million to 467 students.

Donors can create their own scholarships or support existing scholarships such as College Futures Monterey County, where 95 percent of recipients are the first in their family to attend college. This approach offers need-based scholarships and student support services to students from 12 local high schools. Studies show this can have a significant impact on increasing degree completion for low-income students.

The CFMC is now the 4th highest in number of scholarships awarded annually among California community foundations.



“

Receiving this scholarship means the world to me. It not only alleviates the financial burden of my education but also serves as a profound source of motivation and encouragement. Your generosity has inspired me to work even harder and strive for excellence in all of my endeavors.

Axel Uriel Martinez Sanchez
CSU Sacramento



“

I've always dreamed about pursuing an Agriculture major, and obtaining this scholarship will help me achieve that dream. I want to return to my hometown so I can help provide safe produce from our local fields to my community.

Colton Matthew Sanchez
CSU Chico



“

My parents have given up everything so I could have what they did not. To thank my parents and the community that has raised me, I will be working towards a degree in Molecular, Cell and Developmental Biology and I hope to return to Salinas as a family medicine physician.

Estrella Magaly Jasson Aparicio
UC Santa Cruz

Benefits of Creating a CFMC Scholarship

- Simplified Administration
- Local Expertise and Impact
- Tax Benefits
- Flexibility in Fund Design
- Long-Term Legacy
- Professional Investment Management
- Connection to the Community
- Application Portal
- Opportunities for Additional Funding



Strength in Community

Barbra Ann Wagner

Barbra Ann Wagner, a proud first-generation Otter at CSU Monterey Bay, is majoring in Business Administration. She is a recipient of the Steve and Marti Diamond Scholarship of the Community Foundation for Monterey County.

Raised in a household shaped by adversity—her mother diagnosed with Multiple Sclerosis at 19 and her father, a medically retired correctional officer coping with PTSD—Barbra Ann found strength in faith, love and music.

Her passion for music began at age three. Encouraged and mentored by her father, she grew into a performer, singing and playing drums across the Salinas area. Performing led her to community service—singing at American Legion fundraisers, Relay for Life events and the California Rodeo Salinas, among others. Her performances have supported causes such as cancer research, toy drives for Natividad Pediatrics and programs for adults with intellectual disabilities.

Barbra Ann is also a worship leader at her church, viewing her role as a way to uplift and prepare hearts for life-changing messages. Her love for both creativity and leadership inspired her to major in business, realizing that the arts and business must work together to thrive.



Barbra Ann Wagner shares her music with local nonprofits

At CSUMB, she has seized opportunities such as interviewing the vendors and small business owners at the Monterey Jazz Festival, a project led by former professor Colleen Bailey. She learned firsthand the importance of perseverance and dedication, reaffirming her desire to use business to help others, especially local entrepreneurs.

Barbra Ann's journey has not been easy. In her first semester at CSUMB, she unexpectedly lost her father—her biggest supporter. While grieving, she managed funeral arrangements and cared for her mother, all while maintaining a 4.0 GPA. This tragic loss has become a source of renewed motivation to fulfill the dreams she and her father shared.

Barbra Ann credits the scholarship for helping her afford on-campus living and pursue her education fully. "This would not have been a reality for me without their generous financial support through this difficult time," she says. With her education and experience, she hopes to empower local small businesses and continue enriching her community through both business and music.



“

This would not have been a reality for me without their generous financial support.

Barbra Ann Wagner



Fast Facts →

493
scholarships to
467 students

1.8 million
awarded

85
scholarship
funds

Building Disaster Resilience

COAD

The Monterey County COAD (Community Organizations Active in Disaster), a new initiative of the CFMC, works to increase disaster preparedness through community collaboration. In year one, COAD Manager Nick Zafiratos made significant progress. He established activation procedures, membership agreements and program partnerships and attended trainings with the City of Monterey's Community Emergency Response Team, Monterey County Department of Emergency Management and California Office of Emergency Services alongside members of the COAD Advisory Committee.

The mission of the Monterey County COAD is to bring together organizations active throughout the disaster cycle to foster more effective disaster resilience and readiness in the community. The COAD helps build a more effective response in times of need through cooperation, coordination, communication and collaboration.

COAD member organizations benefit from direct communication with the County of Monterey Emergency Operations Center, established relations with the Federal Emergency Management Agency (FEMA) and its national response partners and training and preparedness opportunities tailored specifically for Monterey County's nonprofit and community-based organizations.



(l to r) COAD Advisory Committee members and program partners, Patte Kronlund, Community Association of Big Sur; Nick Zafiratos, CFMC/COAD; Adriana Mata, Second Harvest Food Bank Santa Cruz County; Patsy Gasca, Gaby Perez, Jamshid Kiani, American Red Cross; Emma Clark, Monterey County Department of Emergency Management

The COAD offers quarterly convenings including valuable training sessions and readiness opportunities to strengthen local resilience. The COAD will prepare for disasters and offer support long after state and federal services may end.

The COAD launch on March 26, 2025 included nearly 70 participating members from more than 50 local organizations. Organizations and grassroots groups who would like to be part of the COAD can contact Nick Zafiratos at 831.375.9712 x 134 or email coad@cfmco.org.

Follow for updates: @montereycountycoad



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Emergencies start local, and they end local. It's our area's nonprofit and community-based organizations that offer long-term support and provide true resiliency to Monterey County residents.

Nick Zafiratos
COAD Manager



cfmco.org/COAD

Fostering Economic Empowerment

SIEDI

In the face of ongoing technological and economic changes, the Salinas Inclusive Economic Development Initiative (SIEDI) remains committed to creating a more equitable economic environment. By offering workshops, direct services, quarterly meetings and strategic collaborations, SIEDI has been instrumental in enhancing advocacy, digital literacy and leadership skills across diverse communities.

SIEDI's influence is seen in the improvement of case management models leading to increased workforce training, participation in the arts and better access to digital tools. SIEDI partners have been able to identify and express the concerns, hopes and dreams of Salinas residents, and their advocacy efforts have successfully led to policy changes in education, housing and workers' rights.

SIEDI builds community by fostering economic empowerment and resilience. Advocates have secured essential resources for childcare and housing, while raising awareness about college savings accounts and farm worker rights, resulting in tangible benefits. Organizations are working together to identify creative solutions for unmet needs.



(l to r) Charron Smith, New Hope Baptist Church; Jacob Martinez, Digital NEST and Clarisa Reyes-Becerra, CBDIO at SIEDI convening

"We've identified the need for a community kitchen in Salinas. Grassroots groups providing hot meals to those in need in Chinatown could expand their efforts if a space were available, allowing them to serve daily rather than just a few times a week. We are exploring ways to incorporate this project into our plans for growth," says Charron Smith, New Hope Baptist Church.

The initiative is equipping emerging leaders with the knowledge, skills and connections they need to contribute to a flourishing economy for everyone.



SIEDI



cfmco.org/SIEDI

SIEDI ORGANIZATIONS

- Agriculture and Land-Based Training Association (ALBA)
- Building Healthy Communities (BHC)
- Center for Community Advocacy (CCA)
- Centro Binacional Para El Desarrollo Indígena Oaxaqueño (CBDIO)
- Communities Organized for Relational Power in Action (COPA)
- Digital NEST

- Hijos del Sol
- Loaves, Fishes & Computers (LFC)
- Monterey Bay Central Labor Council
- Mujeres en Acción
- New Hope Baptist Church
- Rancho Cielo

Monterey County Gives!

15 Years of Impact

The Monterey County Gives! campaign, a partnership of the Community Foundation for Monterey County, Monterey County Weekly and the Monterey Peninsula Foundation, has become Monterey County's highest profile year-end giving campaign, inspiring philanthropy and maximizing the impact of charitable donations.

MC Gives! runs from early-November through December, providing a platform for nonprofits to raise funds while benefiting from matching gifts and challenge grants. This unique model encourages giving by boosting donations, allowing organizations to amplify their fundraising efforts.

More than 200 nonprofits participate, covering a broad spectrum of causes, including education, environmental conservation, healthcare, social services and the arts. Donors explore these organizations through the Monterey County Gives! website and the Monterey County Weekly special print edition, where they can contribute to one or more of their favorite nonprofits.



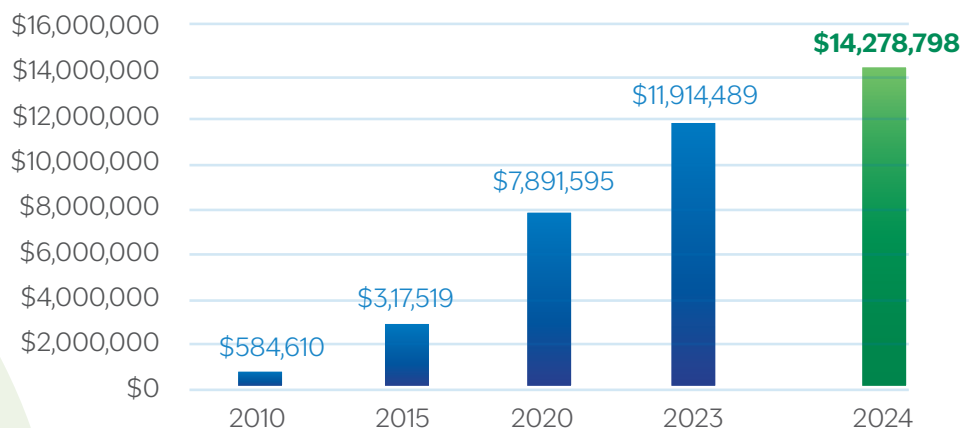
Dan Baldwin, CFMC President/CEO, recognized Bradley Zeve, Founder & CEO, Monterey County Weekly at the 2024 Celebration of Philanthropy for his leadership in Monterey County Gives!

Since its inception 15 years ago, Monterey County Gives! has raised and granted more than \$82 million and become an integral part of the year-end giving landscape, building a culture of generosity and strengthening many of the region's nonprofits with gifts large and small. By connecting donors with meaningful causes, MC Gives! plays a growing role in enhancing the well-being of Monterey County residents and ensuring support for vital community services.

Monterey County Gives! is a special project of the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation. Special thanks to 2024 partners: 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 three anonymous donors for their generous support of the match.

Growing Impact

\$82 Million Raised and Granted Since 2010



mcgives.com

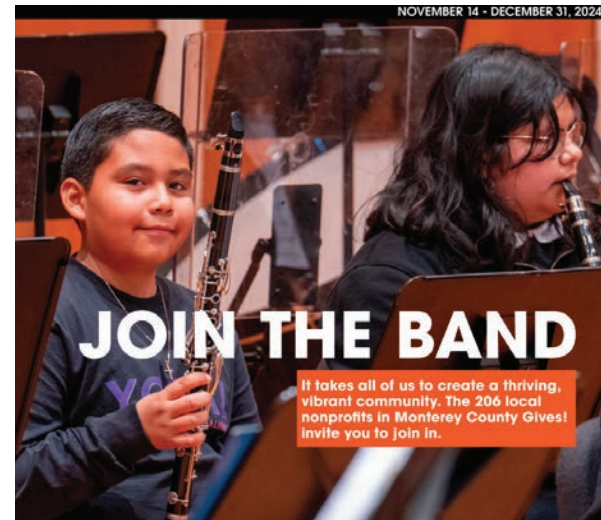
2024 Tops \$14.2 Million

Monterey County Gives! marked a significant milestone in local philanthropy, raising over \$14 million from 7,982 donors through the 2024 campaign. This remarkable achievement underscores the community's dedication to fostering a thriving and vibrant region. The campaign, which ran from November 14 to December 31, 2024, saw a \$2 million increase over 2023. This surge in generosity highlights the power of philanthropy to address local needs.

A unique aspect of MC Gives! is its matching fund structure. In 2024, the campaign had an overall matching fund of \$1.57 million, thanks to major funding partners. Participating nonprofits also secured challenge gifts of more than \$3 million, bringing the matching funds to more than \$4.5 million. This approach not only amplifies individual donations but also encourages broader community engagement.

The campaign also recognized organizations demonstrating exceptional outreach and innovation. Special grants from the CFMC included the Ingenuity Award (\$2,500) to Sun Street Centers, whose substance abuse prevention staff mentor high school leaders to educate their peers on the consequences of fentanyl and other drugs. The Highest Number of Donors Award (\$1,000) went to Peace of Mind Dog Rescue, the Most Donors 18-35 Years Old Award (\$1,000) went to Monterey Peninsula Pride and \$1,000 (each) from the Florence Haspel Zeve Award for women, families and the arts went to Carmel Dance Festival, Musikiwest and New Canon Theatre Co.

Monterey County Gives! significantly strengthens local nonprofits and enhances the quality of life for many residents. The 2024 campaign's success exemplifies the power of collective giving and the spirit of community philanthropy.



JOIN THE BAND

It takes all of us to create a thriving, vibrant community. The 206 local nonprofits in Monterey County Gives! invite you to join in.



**MONTEREY COUNTY
WEEKLY**
PRINT | WEB | MOBILE

**MONTEREY
PENINSULA
FOUNDATION**

Here for Good
**Community
Foundation**
for Monterey County

Fast Facts →

\$14.2 million
from 7,982 donors

\$2 million
increase since 2023

\$1.57 million
matching fund

Community Impact Investment



Fast Facts →

Launched in 2018, the Community Impact Investment (CII) program goes beyond traditional grantmaking to improve communities by strategically investing to expand our impact. Initially, the program focused on investing in local Community Development Financial Institutions (CDFIs). Since then, it has expanded its scope to include direct low-interest loans to nonprofit organizations to support local projects. These investments are designed to deliver both social impact and market-rate or near-market returns for the CFMC portfolio. Unlike grants, CII allocations are governed by CFMC's Investment Policy.

In 2024, CFMC doubled the amount of dollars deployed to nonprofits by adding three new loans to the portfolio, totaling \$3,727,275, for nearly \$7 million in current loans to community nonprofits. Gathering for Women received a loan for \$1,317,275 to pay off the existing mortgage on their headquarters and purchase an additional building next door, allowing them to expand vital community services.

\$2 million
loaned to Pacific Repertory Theatre

\$1.3 million
loaned to Gathering for Women

\$410,000
loaned to Nonprofit Alliance on Mental
Illness (NAMI) Monterey County

\$1.8 million
in repaid principal

\$6.8 million
in outstanding loans to eight
nonprofit organizations

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We are so grateful to CFMC for believing in our work and our vision for expansion! We can't wait to see the transformational change our new facilities will bring to our community. Thank you CFMC for making this possible!"

Staci Alziebler-Perkins

Executive Director, Gathering for Women

Gathering for Women team at site of new facility



Empowering Nonprofit Leaders - CNE

The Community Foundation's Center for Nonprofit Excellence (CNE) is a resource for all nonprofits in our region, whether or not they have received a grant from the Foundation. **The array of CNE support and opportunities helps build lasting, positive change for our community.**

In every community, there are those who dedicate time, energy and expertise to make a meaningful difference through nonprofit organizations. From staff to agency board members and other dedicated volunteers, these individuals seek to learn, grow and bring excellence to their organizations. Their commitment is not just about service—it is about creating greater impact through their missions.

To grow in organizational effectiveness and resilience, many have engaged with the CNE through peer roundtables, training sessions and skill-building programs.

These opportunities have allowed participants to refine grant application readiness, for example, amplify their voices to connect with donor support and enhance board meetings with dynamic financial storytelling. Each effort is a step toward strengthening organizations and building a better, more resilient community.



Team from Sun Street Centers, OD grant recipient



CNE Director Susie Polnaszek and CNE Program Manager Reid Norris host a LEAD Institute session

One powerful example of commitment to organizational and community wellbeing is Sun Street Centers, an established agency that works to prevent alcohol and drug addiction through education, prevention, treatment and recovery services for individuals and families at all income levels. Sun Street Centers secured an Organizational Development (OD) grant to fund its critical Seeking Safety staff training. This initiative equipped staff with the skills to address client trauma and gender-based violence—an effort catalyzed by the tragic loss of two former program clients.

Sun Street committed to staff training beyond what is required for certification and licensing. Funding enabled Sun Street to bring a nationally recognized trainer to teach a counseling model needed to identify and treat clients who may be at risk of serious injury, illness or death due to domestic violence and substance abuse. This proactive investment in staff development and care showcases the power of strategic funding and thoughtful leadership.

This example of learning and action underscores the profound role nonprofit organizations and their leaders play in shaping stronger, healthier communities.



Fast Facts →

200

organizations
partnered with CNE

\$72,350

in Organizational
Development
grants awarded

16 LEAD

graduates
(212 alumni through 2024)

45

nonprofits attended Executive
Director or Board Roundtables



**center for
nonprofit
excellence**



cfmco.org/CNE



Here for Good Campaign

Supporting the Work of the CFMC

With the support of 118 generous donors, the CFMC raised an impressive \$540,000, fueling the Foundation's community leadership work. Special acknowledgment to Bertie Elliott, CFMC fund holder and former Board Chair, whose \$100,000 matching gift amplified the impact of every contribution.

Here for Good
CAMPAIGN

Your support helps strengthen our communities by bolstering leadership on essential issues, aiding in disaster response, and providing vital resources to local nonprofits through the Center for Nonprofit Excellence. Donations to the Here for Good Fund are always welcomed year-round.



Year-End Giving • \$540,000 Raised

CFMC is deeply thankful to all who contributed to the 2024 "Here for Good" Campaign.

Here for Good • \$25,000 +

Anonymous
Bill and Nancy Doolittle*
Bertie Elliott/Bufett Fund*
 E. Stanton McKee Charitable Fund - Fidelity Charitable

Catalyst • \$10,000 +

Anonymous (2)
The Joel and Dena Gambord Foundation*
 Christine and Craig Johnson
Robert and Florence Slinger Fund*
 The Tin Man Fund - Schwab Charitable
 Tuchen Family Charitable Fund - Fidelity Charitable
The Alexander F. Victor Foundation*

Partner in Philanthropy • \$5,000 +

Arkay Foundation
 Aimee and Patrick Burke
 Stephen Eimer and Kevin Cartwright
The Landreth Family Fund*
 The Omaggio Charitable Fund - Schwab Charitable
 William Sharpe
 Viscius Family Charitable Giving Fund
 Thomas A. Werbe Family Fund - T. Rowe Price Charitable
 Ken and Mary Wright

Changemaker (\$2,500 and above)

Incy Brooks - in memory of Peter K. Brooks
 Susan and David Gill
 Vincent Huth
 Kaiser Permanente
 The Meadows Charitable Fund - Schwab Charitable
 Nelson Charitable Fund - Fidelity Charitable
 Patricia Skinner
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Friend of the Foundation • \$1,000+

Anonymous (2)
Rick and Tonya Antle Fund*
Lino and Teri Belli Family Fund*
Buchalter/Adler Family Fund*
Carmel Gives Fund*
 Greg and Liz Chilton
 The Gerald & Joan Colangelo Family Trust
 Kirk and Meredith Gafill
 Tamara and Reuben Harris
 Caroline Hicks
 Beverly Holloway
Tom Hopkins Wilderness Fund*
 Kip and Jay Hudson
Birt and Kathleen Johnson, Jr. Fund*
 Rick and Martha Kennifer

Caron and Alan Lacy Charitable Fund - Fidelity Charitable
 Brian and Carol LeNeve
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 Jane Ashley Lundy
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 Janet McDaniel
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 Grace Merrill
 Clint and Karen Miller
Anthony and Lary Lynn Muller Fund*
 Charles Olvis and Miranda Morris
 Brenda Orr
 Chris and Barbara Ottenweller DAF - Schwab Charitable
 Stephen and Betsey Pearson
 Joe and Mary Pezzini
 Patricia Porter-Hoover Donor Advised Fund - Schwab Charitable
 Janie Silveria and Frank Hoppe
Thau Family Fund*
 The SP Legacy Fund - Vanguard Charitable
 Jennifer Walker and Eric Lee
 David and Linda Wyckoff

**A fund of the Community Foundation for Monterey County*



Celebrating Philanthropy

Raymond Costa Honored

The Community Foundation for Monterey County is committed to inspiring philanthropy and strengthening communities throughout the region. Each year, the Celebration of Philanthropy brings together donors, supporters and community leaders to highlight the transformative impact of local giving. The 2024 celebration, held on October 2, was no exception.

CFMC President/CEO Dan Baldwin highlighted the Foundation's record grantmaking and impactful programs. He recognized Bradley Zeve, Founder and CEO of the Monterey County Weekly, for his leadership in growing Monterey County Gives!—an initiative of the CFMC, the Monterey County Weekly and the Monterey Peninsula Foundation that has significantly boosted year-end donations to local nonprofits.

Jesús Floriano-Ramírez, a recipient of the Raymond H. Costa Family Scholarship five years ago and now a college access practitioner at CSUMB, spoke about how the scholarship shaped his education and career path. He is pursuing a master's degree in Higher Education Leadership, illustrating the life-changing impact of philanthropic support.

The event culminated with 2024 Board Chair Kirk Gafill's presentation of the Distinguished Trustee Award to Raymond Costa, a philanthropist and successful McDonald's franchisee with nine restaurants in the Salinas Valley. His story of resilience and generosity is inspiring. From humble beginnings, he built a successful career and is dedicated to paying it forward to his employees and their families.

In addition to supporting nonprofits throughout the Salinas Valley and beyond, he established the Raymond H. Costa Family Scholarship Fund in 2017, which has awarded over \$420,000 in scholarships to 157 students pursuing higher education. "We are about changing people's lives by giving them an opportunity. If I can help with tuition to help an employee further their goals, then that's what we need to do," he said.

His hope is that recipients not only improve their own lives, but also give back to the community in the future, creating a legacy of opportunity. We are proud to honor Raymond Costa's philanthropic leadership. His investment in his employees' futures exemplifies the generosity of the people we are privileged to partner with and the power of local giving.



(l to r) Christine Dawson, Kirk Gafill, Catherine Fuentes, Raymond Costa and Dan Baldwin at the 2024 Celebration of Philanthropy

“

We are about changing people's lives by giving them an opportunity.

Raymond Costa

THANK YOU 2024 SPONSORS

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cfmco.org/cop2024

Creating Enduring Impact

The Fund for Monterey County

The Fund for Monterey County (FFMC) is a way for people to leave an enduring legacy for our community. The FFMC is comprised of endowed unrestricted and field of interest funds invested to grow over time to forever benefit the people and places of Monterey County.

Gifts to the Fund for Monterey County allow the CFMC to address our greatest local challenges, including relief and recovery grants for disasters such as wildfires, storms and flooding.

The Fund also 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; Community Development; Arts, Culture and Historic Preservation; and Environment and Animal Welfare.

“

The Fund for Monterey County offers an ideal solution for clients who want to make a meaningful impact by supporting a wide range of causes within our local communities.

Jennifer L. Walker

Estate Planning Attorney/Principal, Leach & Walker
CFMC board member



The Fund for Monterey County helps build healthy, safe, vibrant communities. Shown here: youth participants of Palenke Arts

HOW IT WORKS

- You can give to the Fund for Monterey County in your lifetime or name the Fund of the CFMC as the beneficiary of your will, trust, donor advised fund, retirement account or life-income gift.
- The Fund for Monterey County can be included in a Memorandum of Charitable Intent (MOCI), a complimentary service of the Foundation that documents your wishes for your legacy giving. It can be updated at any time at no cost.
- Your unrestricted gift provides philanthropic resources to meet current and future challenges and creates a meaningful impact.

We are grateful for all those who have invested in a lasting legacy by including the Fund for Monterey County in their giving plans. Growing the Fund for Monterey County ensures that the CFMC will continue to meet changing needs, now and for generations to come.



cfmco.org/FundforMontereyCounty

Rooted in Community

Steve and Kim McIntyre

Steve McIntyre, a third-generation Californian, met Kim—a Minnesota native—after she moved to California and enrolled at Camarillo High School. The two became high school sweethearts and married in 1980 while both were studying in Fresno.

Kim pursued a career in dental hygiene, while Steve followed a path into viticulture. A professor at Fresno State further fueled Steve's passion for winemaking, leading him to earn a Master's Degree in viticulture and enology from CSU Fresno.

In the 1980s, the couple moved to Monterey County when Steve took a job planting Galante Vineyards and then worked as assistant winemaker/viticulturist at Hahn Smith & Hook. In 1992, they founded Monterey Pacific LLC, which they ran for over 30 years, planting and farming thousands of acres and producing hundreds of wines.

Kim attributes her deep-rooted philanthropic values to her father. "We were raised to give back and think of others," she says. The McIntyres volunteered extensively with 4-H while raising their three children and continued to mentor volunteers long after. "We're so pleased we raised our family here—it's such a great community," they reflect.

Seeking a way to streamline their giving, they learned about donor advised funds and were immediately drawn to the idea. "It just made sense," says Steve. "Pooling resources for growth and ensuring they're invested wisely to make an impact in the community—it's a great concept." In 2018, they partnered with the Community Foundation to establish the Kim and Steve McIntyre Fund and the Monterey Pacific Company Fund.



Steve and Kim McIntyre give where they live

Their giving process is a personal one—often decided “over dinner and a glass of wine”—with a focus on supporting children, youth and animals, particularly in the Salinas Valley and South County. Their philanthropic reach has supported a diverse range of causes, including Rancho Cielo, the Albert & Donna Oliveira Clinic in Greenfield, a youth soccer team in Greenfield and preservation efforts at Mission San Antonio. “We like to help people succeed,” Steve shares.

Steve and Kim also dedicate their time and talents. Steve served on the board of the Big Sur Land Trust and is a member of the Salinas Valley Basin Groundwater Sustainability Agency. Kim is a breeder for Bernese Mountain Dogs (they have six). She fundraises for The Bernese Mountain Dog Club of America, focused on improving longevity for the breed.

Looking ahead, the McIntyres plan to expand their philanthropy and involve their adult children in their giving decisions. Their decades-long commitment to agriculture, community service and charitable giving continues to make a lasting impact on the Salinas Valley and greater Monterey County. “It takes time to discover what brings you joy,” Steve says. “For us, giving back is a big part of that.”

“

“Pooling resources for growth and ensuring they’re invested wisely to make an impact in the community—it’s a great concept.”

Steve and Kim McIntyre



(l to r) Scholarship recipient Lizeth Patena; Esmeralda Owen, Erin Clark, Judy Guzmán Krueger, Diane Danvers Simmons, Maija West, Morgane McNally, Tonya Antle, Christine Dawson, Margaret D'Arrigo; Christine Dawson and Morgane McNally

The Ripple Effect

Women's Fund



The Women's Fund harnesses the power of philanthropy to overcome obstacles, create opportunities and change the trajectory of people's lives. It creates a ripple effect that inspires women and girls to realize their full potential and give back to others.

2024 Grants exceeded \$85,000 including support for the Boys & Girls Clubs of Monterey County to facilitate the Girls' Health in Girls' Hands program, \$30,000 in college scholarships and \$10,000 each to Monterey Peninsula College and Hartnell College for Emergency Assistance for women and students who are mothers.

The 17th Annual Women's Fund Luncheon on May 17, 2024 brought together nearly 600 people to raise funds to empower local women and girls. Christine Dawson, CFMC Senior VP of Philanthropic Services, led a conversation with Morgane McNally, Senior VP/ Resident Director of Merrill Wealth Management, BMRB Group, on "the Power and Progress of Women." Morgane spoke about the importance of women owning their financial futures by creating retirement and investment accounts. She shared that mentoring is key at all stages, "Look for it and offer to guide others." Christine concluded that women are growing as a force for good with purpose-driven philanthropy.

Scholarship recipient Lizeth Patena shared her story of overcoming obstacles as a native Spanish speaker learning English. She volunteered as a mentor both to middle school and college students. "I will be the first person in my family not only to graduate from college, but to graduate with honors. It is with great joy I share with all of you that I will be accomplishing my lifelong dream of becoming a teacher." She is now working as an elementary school teacher in Salinas.

Esmeralda Owen, Women's Fund Leadership Council member and entrepreneur, spoke about how scholarship and mentorship support shaped her path as a writer and inspired her to give back throughout her life.

Thanks to careful stewardship and planned estate gifts, the endowment will continue to grow, grant and amplify the ripple effect for years to come.

“

Having the support of people uplifting me was a source of energy and drive for me. The Women's Fund does just that."

Esmeralda Owen
Women's Fund Leadership Council

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Special Thanks



Seeding Change

Siembra Latinos Fund



Established in 2017 to improve the quality of life for Latinos in Monterey County, the Siembra Latinos Fund (SLF)—a field of interest fund of the Community Foundation for Monterey County—remains committed to its vision of fostering healthy, safe and engaged Latino communities.

SLF has consistently prioritized both immediate and long-term needs, awarding over \$130,000 in grants to organizations providing COVID-19 and Pajaro flood relief, as well as supporting efforts in Census 2020 outreach, mental health, education and economic development.

With support from more than 100 donors—contributing gifts from \$20 to \$20,000—these grants showcase the strength of collective giving to drive meaningful change. By engaging a diverse philanthropic community, Siembra Latinos Fund amplifies its impact on the issues that matter most to Monterey County's Latino residents.

Siembra's annual fundraiser has grown into a vibrant celebration of community, philanthropy and the achievements of local Latino leaders paving the way for future generations. Established in honor of Alfred Diaz-Infante—a visionary community leader and nonprofit executive known for forging partnerships that uplifted Monterey County's Latino community—the 2024 Alfred Diaz-Infante Award was presented to Dr. Juan P. Magaña.

Born and raised in Salinas, Dr. Magaña always envisioned returning to serve his hometown. Today, he is a Hospitalist at Community Hospital of the Monterey Peninsula (CHOMP) and the founder of Minorities in Medicine, a program dedicated to increasing the number of underrepresented minority students entering medical careers and ultimately returning to serve their communities.



(top) SLF Advisory Council Members (l-r) Luis Diaz-Infante Jr., Elsa Mendoza Jimenez, Lorraine Yglesias, Martha Zárate and Jose Arreola with 2024 Award Recipient Dr. Juan Magaña
(bottom) Guests at the annual Siembra Latinos Celebration

2024 marked a time of reflection and growth for the SLF. The Advisory Council expanded its mission to **"Cultivating Latino leadership and Opportunities in Monterey County."**

Siembra's grantmaking will continue to support nonprofits that help advance the economic mobility of Monterey County's Latino community.

Through its Seeds of Change Campaign, Siembra is committed to build on a culture of giving and poised to drive lasting change through impactful grants, insightful research and powerful storytelling.



cfmco.org/siembra

Fast Facts →

Granted
\$25,000
(more than \$130,000
in cumulative grants)

More than
\$282,000
raised since inception

Celebrated 7th Anniversary
raised more than
\$30,000
through annual event



Neighbors Helping Neighbors

Regional Funds

The Community Foundation's regional funds play a vital role in strengthening communities by addressing localized needs through targeted grantmaking. These funds support a wide range of initiatives, from education and social services to environmental conservation and economic development, ensuring resources reach the areas where they are most needed. By strengthening local nonprofits and community resources, these funds foster collaboration and drive positive, lasting change.

Big Sur Fund Spotlight

Uplifting the Community in a Time of Need

On March 31, 2024, a section of Highway 1 at Rocky Creek Bridge slid into the sea after heavy winter rains, resulting in the closure of traffic into and out of Big Sur. Meanwhile, the South Coast remained inaccessible due to three earlier slides. This prolonged situation caused significant hardship for residents, workers, businesses and essential services throughout the Big Sur community.

During times of disaster, we've witnessed the remarkable way people come together to offer support. In a matter of days, the CFMC, in partnership with David Fink, the Big Sur Food & Wine Festival team and members of the Big Sur Fund Advisory Council, came together to raise \$112,000 from an event and auction to benefit the Big Sur Disaster Relief Fund. Proceeds were granted to the Community Association of Big Sur (CABS), to assist those impacted by the closure.

The Big Sur Disaster Relief Fund is part of the Big Sur Fund in Memory of Weston Call, which granted \$21,000 in 2024 and \$134,000 since 2019.



Fast Facts →

\$274,000

total distributed - most within four weeks of the Rocky Creek Slip Out

548

Immediate relief checks of \$500 each were distributed by CABS to affected employees and independent contractors

\$54,000

raised by private donations to Big Sur Disaster Relief Fund

\$112,000

raised by the La Playa Fundraiser event organized by David Fink



cfmco.org/bigsur

Northern Monterey County Foundation

Created in 2016, the Northern Monterey County Foundation (NMCF) is dedicated to enhancing the quality of life in Northern Monterey County, including Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita. The Fund supports a broad range of projects that aim to improve life for North County residents, including local initiatives that promote education, health, community development and the arts.

As a participant in the 2024 Monterey County Gives! campaign, the NMCF raised more than \$51,000 from the local community demonstrating the power and passion of “neighbors helping neighbors.”

“The NMCF is the epitome of giving where you live, making an impact now and an investment in the future of our community.” - *Danielle Vierra, NMCF Advisory Council Chair*

- **Granted \$51,000**
(\$285,500 since 2017)
- **Raised \$750,000 through 2024**
- **Endowment of \$405,000**

Southern Monterey County Foundation

The Southern Monterey County Foundation (SMCF) is a way for people to give together to strengthen communities from King City and points south to the County line. In November 2024, the SMCF granted \$30,000 to nine organizations, supported in part by Chevron, to benefit the communities of Southern Monterey County.

More than ten years strong, the SMCF is continuing to grow with its “Campaign for the Future.”

The goal is to build an endowment of \$2 million, which will provide a continuing source of grants for groups providing care and support to the people of South County. At \$2 million, the SMCF will be able to provide up to \$90,000 in support annually for generations to come.

The SMCF continues to be a vital force in fostering community well-being, empowering local organizations and creating lasting positive change.

- **Granted \$30,000**
(\$253,000 since 2014)
- **Raised \$868,000 through 2024**
- **Endowment of \$390,000**

Community Fund for Carmel Valley

The Community Fund for Carmel Valley (CFCV) helps protect and improve the quality of life for its residents. Though Carmel Valley offers a wonderful quality of life for some, there are many unmet needs.

The CFCV has created a way for caring neighbors to come together to grow funds to thoughtfully address these local needs. Grants support the greater Carmel Valley area from Highway One to Cahoon Grade.

Priorities include building community, improving infrastructure, expanding youth programming and services, supporting educational, cultural and historical programs and nonprofits serving greater Carmel Valley. All of this with the additional goal of enabling rapid response to community crises, meeting emergency needs and providing disaster relief by building its Disaster Relief Fund.

- **Granted \$29,500**
(\$320,000 since 2020)
- **Raised \$492,000 through 2024**
- **Endowment of \$141,600**



NMCF Grant Recipient, Brighter Bites, Monterey County



SMCF Grant Recipient, Girls Inc. of the Central Coast



CFCV Grant Recipient, Cachagua Fire Protection District

The Power of Legacy

Bob House and Greg Chilton

Bob House and Greg Chilton exemplify a profound legacy of service, philanthropy and community leadership in Monterey County. Bob, a respected attorney, founded his law practice in Salinas in 1967. His son, Greg Chilton, joined him in the firm, which became Chilton & House Inc., serving the community for over three decades.

Both have held the position of Board Chair at the Community Foundation for Monterey County (CFMC), with Bob serving from 2002 to 2003 and Greg in 2016, marking the first father-son duo to lead the Foundation.

Thanks to their personal experience with and deep knowledge of the CFMC, Greg shares that they have frequently referred their clients to the Foundation. “When clients want to integrate charitable giving into their estate plans, we’ve found that having a partner like the Community Foundation - local people we can meet with and talk to - is a resource like no other.”

“We always felt that all we have to do is introduce people to the Foundation and let them see who they are and what they can do. People would have the confidence we have in their expertise.” Bob concurs adding, “The Community Foundation is an amazing resource. We’re so lucky to have it benefiting our County and our people. It is one of the best things to happen in our community.”

Their philanthropic efforts are not just professional but deeply personal. Bob says, “I believe we have to practice what we preach. I’ve personally set up a Charitable Remainder Trust with the Foundation.” With a Charitable Remainder Trust (CRT), the donor receives an immediate tax deduction and receives a fixed percentage payout of income for life. CRTs at the Foundation are expertly managed by TIAA Kaspick and backed by the assets of the CFMC. The remainder creates a charitable fund for a nonprofit or cause they specify to do good work, forever.

To that end, Bob and his wife Millie are involving the next generation in their philanthropy. The remainder of the trust, now grown to more than 150% of their contribution 20 years ago, will create a donor advised fund, with their sons, Greg and Mark, designated as advisors to guide future grants.

Beyond their professional and philanthropic endeavors, Bob and Greg have held leadership roles in local professional and nonprofit organizations. In addition to both leading the Community Foundation board, Greg is a past chair of Legal Services for Seniors and Bob served as chair of the Salinas Valley Memorial Hospital Foundation. Their contributions have been recognized by their peers and numerous groups for their dedication to the betterment of our community.

Bob and Greg’s shared commitment to charitable giving and community involvement serves as a testament to the power of leadership, legacy and the spirit of philanthropy.



“

When clients want to integrate charitable giving into their estate plans, we’ve found that having a partner like the Community Foundation - local people we can meet with and talk to - is a resource like no other.

Greg Chilton

(l to r) Greg Chilton and Bob House, both past CFMC Board Chairs, exemplify giving back

Salinas Valley

Growing Giving

Philanthropy in the Salinas Valley is more than a tradition—it's a deeply rooted value shared by generations of residents and leaders in the local agricultural industry. The Community Foundation for Monterey County is honored to be a trusted partner in this legacy of generosity. Thanks to nearly 150 Salinas Valley-based charitable funds, the CFMC has granted over \$36 million to causes that touch every corner of the Salinas Valley—from health and human services to education, youth programs, arts and culture and community development.

At the heart of this effort is a shared belief: we are stronger together. In total, more than \$81.6 million has been granted from the Community Foundation to benefit the Salinas Valley. The CFMC works alongside families, individuals and businesses to support both immediate and long-term needs.

Many have found a meaningful way to give back through donor advised funds—receiving an immediate tax benefit while supporting the causes they care about most. The CFMC manages all the administrative details, allowing donors to focus on the joy and impact of giving. Businesses like Monterey Pacific Company and Nunes Company use company donor advised funds to streamline their charitable efforts. With just one contribution, they can direct support throughout the year with a call or email—making giving both efficient and impactful.

Andy D'Arrigo, who partners with the Foundation through the Andrew and Phyllis D'Arrigo Donor Advised Fund, puts it simply: "This valley has been very good to us. If you're

in a position to give back, then you do it. Leave a little seed for the next crop." Fundholders Mike and Mary Orradre, echo this spirit: "We give because it's the right thing to do."



“

If you're in a position to give back, then you do it. Leave a little seed for the next crop.

Andy D'Arrigo



John and Annette Romans partner with the CFMC through the John and Annette Romans Family Fund

Scholarships are another powerful way local giving is making a difference. Companies such as Taylor Farms, Church Brothers - True Leaf Farms, and others award over \$1 million annually to local students. These scholarships—like the Raymond H. Costa Family Scholarship, Hugo and Dolores Tottino Family Scholarship Fund and Henry Hibino Memorial Scholarship—help shape the future of the Salinas Valley by helping local students achieve their goals.

Salinas Valley donors also grow local philanthropy through the Southern Monterey County Foundation and Northern Monterey County Foundation funds to support regional projects and programs. The CFMC also holds funds for more than 75 nonprofit agencies as well as projects like the Gonzales and Soledad Community Centers and King City's Forden Park Playground.

True to its motto—"Here for Good"—The CFMC is proud to serve as a bridge between generosity and impact in this ongoing legacy of giving—today and into the future. Whether helping students pursue higher education or ensuring nonprofits can deliver vital services, together, we are building a stronger Salinas Valley and investing in a healthier, more vibrant future for all who call this region home.

Leaving a Legacy



cfmco.org/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 all those who have made this important decision.**

LEGACY SOCIETY MEMBERS

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Leonard Laub
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Susan Wolfe
Kenneth and Mary Wright
Richard Zahm*

*In Memoriam



The Legacy Society

The Legacy Society honors those who have chosen to partner with the CFMC through their estate.

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



Please contact Cecilia Romero, Vice President of Philanthropic Services, at **831.375.9712** or **legacy@cfmco.org** to explore gift planning options. We would be honored to assist you.

Family of Funds

The CFMC holds more than 750 funds created by generous individuals, families and businesses. The CFMC is a steward of both the charitable resources entrusted to us and each donor's philanthropic vision. Donors can choose from many types of funds to enhance their giving.



Boys and Girls Clubs of Monterey County team at Women's Fund Luncheon

Types of Funds

AFFILIATE FUNDS

A local advisory council provides oversight, defines grantmaking priorities and raises funds to grant to community organizations serving a specific geographic region.

AGENCY ENDOWMENT FUNDS

A permanent philanthropic resource for nonprofit agencies, these funds are invested for the long term, producing a steady source of support in perpetuity.

AGENCY STEWARDSHIP FUNDS

Nonprofit 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 impact.

DESIGNATED FUNDS

Donors can choose an agency or agencies to support over time with a permanent, protected stream of operating income.

DONOR ADVISED FUNDS

Donors recommend grants to support the nonprofits of their choice and benefit from customized service and support to enhance their philanthropy.

FIELD OF INTEREST FUNDS

Donors specify a cause or charitable interest area and the CFMC awards grants to local nonprofit organizations working in those areas.

PRIVATE FOUNDATION FUNDS

These funds offer administrative support, tax advantages, increased flexibility and personalized philanthropic services.

SCHOLARSHIP & AWARD FUNDS

Donors invest in the future of local students by creating opportunities for them to achieve their academic goals.

SPECIAL PURPOSE FUNDS

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



Bertie Elliott and Dan Baldwin at the 2024 Celebration of Philanthropy

764
Funds



cfmco.org/FamilyofFunds

New Funds Created

We thank those individuals, nonprofits and businesses who have chosen to partner with us in their philanthropy.*

AGENCY

Friends of Andy Ausonio
Library Endowment Fund
Breast Cancer Assistance
Group Stewardship Fund
Bob Hoover Academy
Stewardship Fund
Cold Case Project of
Monterey County Fund
Junior League of Monterey
County Stewardship Fund
The Marina Foundation
Stewardship Fund
Monterey Opportunity
Housing Trust Stewardship
Monterey Peninsula
Buddhist Temple
Stewardship Fund I
Monterey Peninsula
Buddhist Temple
Stewardship Fund II
Church in the Forest
Joe Verska Music Fund
Youth Arts Collective
Stewardship Fund

CAPITAL CAMPAIGN

The Marina High School
Stadium Capital Campaign

DESIGNATED

The Los Altos Sunset
Rotary with Bill and Mabel
Mayhood Fund
Peetie's Purpose
Designated Fund

DONOR ADVISED

21 Gifting Fund
Baker Fund
Corvus Benedictus
Foundation Fund
Bob Fund
Phil Carey and Koji Kainuma
Fund
John and Pamela Craig
Family Foundation Fund
Duke Family Foundation
Fund
The Peter and Erlene
Fichtner Charitable Fund
David R. Fritsch Jr.
Charitable Foundation
Fund
David and Carla Garnham
Fund
Pat Grant DVM Charitable
Fund
Fred and Katie Hamilton
Family Fund
The Homer T. Hayward
Lumber Company Fund
Bill and Cheryl Kampe
Charitable Fund
Kight Green Family
Foundation Fund
Janette Loomis Charitable
Fund
The Andrew Jim Maness
and Steven Paul Schmidt
Fund
Adele P. Margolis Fund

McCully Hansen Johnson
Family Fund
Margery and L. Bruce Meyer
Memorial Fund
Morgens West Fund
Moroh/Wanderman Family
Fund
Nahas Family Fund
Rapa Trust Fund
Rosen Charitable Fund
Joanne Taylor Fund
Tyler Fund for the
Performing Arts
Wanda C Vollmer
Foundation Fund
Andrew Horst Wolfe Fund

FIELD OF INTEREST

Barbara M. Balison &
Randolph L. Balison Fund
for Community Health &
Social Services
Women's Fund Non-
Endowed (Grantmaking)

SCHOLARSHIP & AWARD

Bird Educational
Scholarship Fund
Carmel Stone Imports
Scholarship Fund
Alexis de Tocqueville
Society Award for Early
Educators Fund
Gruit Memorial
International Student

College Scholarship Fund
EWJ Hitchcock Memorial
Scholarship Fund

Legacy of Learning Jaroslav
"Jerry" Stepanek Memorial
Scholarship Fund
The Lifelong Learning Steve
Attix Memorial Scholarship
Fund
Megan Reis Imagine
Scholarship Fund
Ruelas Fulfillment
Foundation Scholarship
Fund
Taylor Farms SoCal Award
Program Fund
The Voice for Justice
Scholarship Fund
Michael Anthony Willemssen
Public Service Scholarship
Fund

SPECIAL PURPOSE

MPNFA Nanao Earthquake
Relief Fund
Moss Landing Fire Relief
Fund
OCPSC Trusted Messenger
Program Fund
THRIVE for Monterey
County

**New Funds created in
2024 through May 2025*

(l to r) Koji Kainuma and Phil Carey created a family donor advised fund; Christine Dawson (l) congratulates scholarship fund holder Fabiola Ruelas, who was named Philanthropic Young Adult at the 2024 National Philanthropy Day Celebration



cfmco.org/FundList

45
new funds
established
in 2024



Donor Stories

Hank and Julie Armstrong: A Life of Adventure and Giving

Hank and Julie Armstrong have lived a life filled with adventure and service. Their journey began with a publicity tour at Sacramento Magazine, where Hank was editor, and Julie was visiting with a tiger cub from Marine World/Africa USA. They married 3 years later (with the same tiger -full-grown- attending their wedding!) and their relationship evolved into decades of meaningful work and philanthropy.

Hank retired as Vice President of Communications of the Monterey Bay Aquarium after 33 years. Julie brought her communications expertise to several local organizations, including the Monterey Peninsula Chamber, Monterey County Film Commission and the Big Sur Marathon Foundation.

Long-time supporters of the Monterey County Gives! campaign, they created the Hank and Julie Armstrong Family Fund, a donor advised fund of the CFMC, to facilitate giving for themselves and their three daughters. The fund offered an immediate tax deduction and allows them to recommend grants over time, which focus on human services and environmental causes.



Donor advised fundholders Julie and Hank Armstrong

“

It's a pleasure to give this way, and with the Foundation's help, to do it well.

Hank Armstrong

Mike Haynes: Making Local Impact

Salinas native Mike Haynes followed in the footsteps of his father, who founded Cinderella Carpets in the late 1960s. Mike began working in the family business during high school and eventually took it over.

In 1999, inspired by a desire to give back to the community that supported their business, Mike's father established the Haynes Charitable Foundation. The foundation focused on supporting local causes, especially youth under 12. In 2010, Mike, along with his siblings and daughter, assumed stewardship of the foundation.

By 2022, the administrative demands of managing a private foundation became burdensome. The family easily transitioned their foundation into the Haynes Charitable Foundation Fund, a donor advised fund of the CFMC. "I have peace of mind and we can focus on giving," Mike shared. "It's been seamless."

Mike continues to focus on making local impact, such as providing pediatric medical equipment through Natividad Medical Foundation and increasing access to healthy food through Everyone's Harvest. "I want to continue the legacy of my father," Mike said. "It just feels good."



Mike Haynes continues a legacy of giving

2024 Financials



cfmco.org/Finances

COMMUNITY FOUNDATION FOR MONTEREY COUNTY CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2024

Additions	
Contributions*	\$59,631,459
Other income	982,300
Total revenues and support	\$ 60,613,759
Investment gains	24,819,428
Grants and expenses	
Grants*	\$ 44,397,700
Other operating expenses	6,140,534
Total grants and expenses	\$ 50,538,234
Increase in net assets	34,894,953

CONSOLIDATED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2024

Net assets	
Beginning of year	298,014,742
End of year	\$332,909,695
*net of contributions received and grants disbursed on behalf of nonprofit agency and stewardship funds	
Assets	
Cash and equivalents	\$33,639,461
Contributions receivable	441,408
Other assets	12,744
Property and equipment, net	2,553,163
Investments, carried at market value: Mutual funds and equities	10,383,039
Cash and money market funds	320,496,314
Right-of-use asset	66,020
Charitable gift annuities	4,775,027
Beneficial interest in remainder trusts administered by other trustees	907,701
Investments held in charitable remainder trusts	20,248,345
Total assets	\$420,197,115
Liabilities and net assets	
Grants payable	\$3,037,519
Accounts payable and accrued expenses	465,156
Notes payable	2,123,003
Lease liability	68,895
Liabilities under split-interest agreements and charitable remainder trusts	13,097,206
Funds held for others	68,495,641
Total liabilities	\$87,287,420

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.

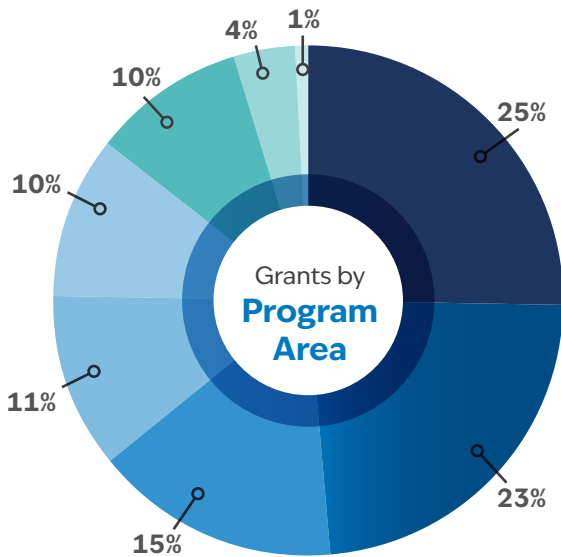
CFNS
ACCREDITED
FOUNDATION

Photo by Chris Burnham

2024 Grant Details



cfmco.org/Grants



Grants by Program Area

Education	
Human Services	
Public & Community Benefit	
Arts	
Health	
Environment	
Animal Welfare	
Religion Related	

Amount

Grants

\$11,280,095	896
10,410,173	577
6,813,140	668
4,995,568	320
4,591,458	275
4,250,102	213
1,765,036	83
292,128	59

Total

\$44,397,700

3,091

Grants by Region

Countywide
Monterey Peninsula
Salinas/Salinas Valley
Castroville/North County
Big Sur Coast
Multiple Areas
Carmel Valley Area
Other California
Outside California

Amount

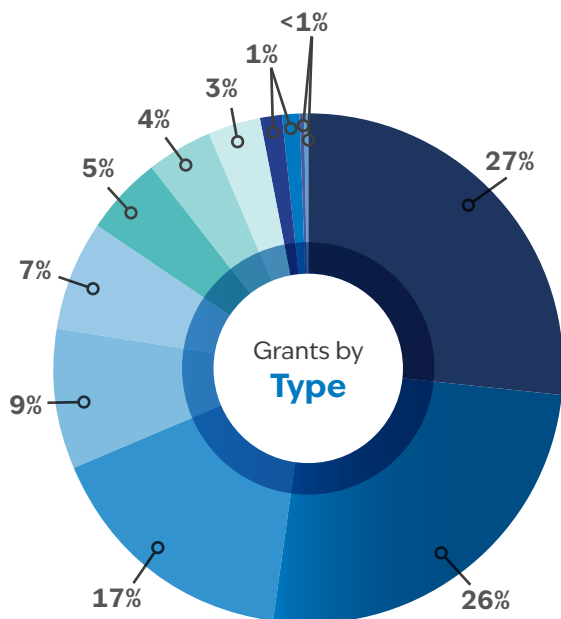
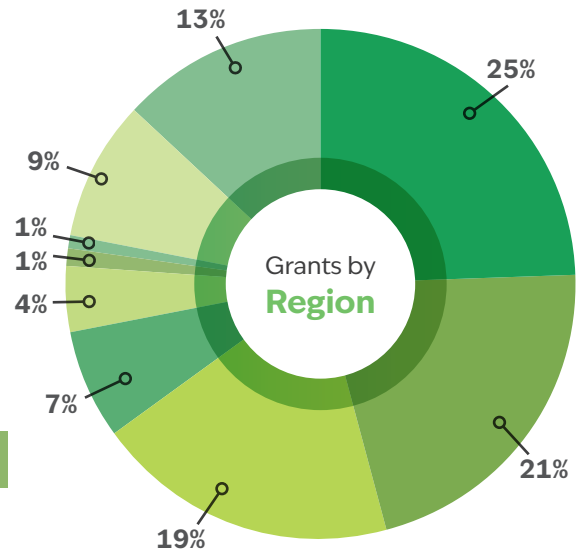
Grants

\$10,893,140	628
9,538,378	534
8,530,204	312
3,033,720	89
1,882,063	69
445,785	36
366,718	40
3,965,312	867
5,742,380	516

Total

\$44,397,700

3,091



Grants by Type

Donor Advised
MC Gives! Campaign
Special Project
Restricted Fund
Pass Thru/Temporary
Discretionary
Scholarships
Community Impact
Opportunity & Neighborhood
Field of Interest
Affiliate Fund
Organizational Development

Amount

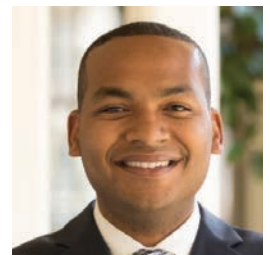
Grants

\$ 11,870,046	1,272
11,327,592	206
7,339,106	83
3,977,630	545
3,013,508	141
2,227,332	54
1,836,147	511
1,545,000	119
554,260	74
511,730	43
123,000	34
72,350	9

Total

\$44,397,700

3,091



2025 board members (l to r): Elsa Mendoza Jimenez (Chair), Joe Pezzini (Vice Chair) Jesse Lopez, CPA (Treasurer), Kathleen Lee (Secretary), Dr. Rolando Cabrera, Mary Claypool, Robert Cullen, Kirk Gafill, Deneen Guss, Romero Jalomo, Adriana Melgoza, René Mendez, Larry Oda, Colby Pereira, Francine Rodd, Julie Roth, John Tilley, Jennifer L. Walker, Tyller Williamson

Leadership 2025 Board of Directors

Elsa Mendoza Jimenez (Chair)

Director of Health Services
Monterey County Health
Department

Joe Pezzini (Vice Chair)

Senior Director of Ag Operations
Taylor Farms

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 Financial
Services Agency

Kirk Gafill

President/Chief Financial Officer
Nepenthe/Phoenix Corporation

Deneen Guss

County Superintendent of Schools
Monterey County Office of
Education

Romero Jalomo

Vice President Student Affairs
Hartnell College

Adriana Melgoza

Executive Director
Watsonville Law Center

René Mendez

City Manager
City of Salinas

Larry Oda

Community Volunteer
Former JACL National President

Colby Pereira

Chief Operating Officer
Braga Fresh Family Farms

Francine Rodd

Executive Director
First 5 Monterey County

Julie Roth

Advisor
Integrus Wealth Management

John Tilley

Senior Vice President
Pinnacle Bank

Jennifer L. Walker

Attorney and Shareholder
Leach & Walker, a Professional
Corporation

Tyller Williamson

Mayor of Monterey

We thank Giff Lehman, whose term ended in 2024, for his years of dedicated service.



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

2025 Staff

Jessica Alcantar-Tinajero

Grants and Office
Coordinator

Dan Baldwin

President/CEO

Chalet Booker

Administrative Officer

Michael Castro

Director of Community
Initiatives and Partnerships

Daniela Cervantes

Community Impact and
Equity Officer

Gina Cervantes

Accountant

Christine Dawson

Senior Vice President of
Philanthropic Services

Gina Delli-Gatti

Communications Officer

Kim Drabner

Senior Vice President
of Finance and Human
Resources

Sarah Elias

Senior Accountant

Daniel Faith

Director of Finance

Esther Figueroa

Scholarships and
Community Impact Manager

Karina Gutierrez-Barboza

Grants and Data Specialist

Maria Hauman

Director of Operations

Amanda Holder

Director of Communications

Laurel Lee-Alexander

Vice President of
Community Impact

Araceli Malone

Accountant

Jakie Marquez

Philanthropic Services and
Scholarships Assistant

Jasmine Menor

Philanthropic Services and
Events Coordinator

Vanessa Miranda

Administrative Coordinator

Reid Norris

Program Manager, Center for
Nonprofit Excellence

Susie Polnaszek

Director, Center for
Nonprofit Excellence

Cecilia Romero

Vice President of
Philanthropic Services

Janet Shing

Director of Grantmaking

Alisa Smith

Philanthropic Services
Officer

Brian Thayer

Senior Philanthropic
Services Officer

Reyna Urzua

Administrative Officer

Nick Zafiratos

COAD (Communities
Organized Around Disaster)
Manager



cfmc.org/staff



Here for Good
**Community
Foundation**
for Monterey County

Gratitude 2024 Committees

BOARD COMMITTEES

Executive Committee

Kirk Gafill (Chair), Elsa Mendoza Jimenez, Romero Jalomo, Kathleen Lee, Giff Lehman, Jesse Lopez, Joe Pezzini, Francine Rodd, Tyller Williamson

Audit Committee

Larry Oda (Chair), Mary Claypool, Kirk Gafill

Community Impact

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

Community Impact Investment

Tyller Williamson (Chair), Kirk Gafill, Giff Lehman, Loren Steck, Bill Tebbe, Nolan Kennedy, John Tilley

Diversity, Equity and Inclusion Work Group

Romero Jalomo (Chair), Elsa Mendoza Jimenez, Adriana Melgoza, René Mendez, Larry Oda, Francine Rodd

Endowment Stewardship

Jennifer Walker (Chair), Kirk Gafill, Elsa Mendoza Jimenez, Betsey Pearson, Greg Chilton

Finance

Jesse Lopez (Chair), Rolando Cabrera, Mary Claypool, Kirk Gafill, Joe Pezzini, David Warner

Governance

Elsa Mendoza Jimenez (Chair), Kirk Gafill, Deneen Guss, Adriana Melgoza, Colby Pereira

Investment

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

Philanthropic Services

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

Real Estate Advisory

Rob Cullen, Giff Lehman, Greg Chilton,

Jim Heisinger, Rick Kennifer, John Mahoney, Bill Mitchell

ADVISORY COMMITTEES

CNE Advisor Circle

Staci Alziebler-Perkins, Stacie Andrews, Colleen Bailey, Ida Lopez Chan, Lauren DaSilva, Steve Dennis, Ron Johnson, Jeff Hinderscheid, Corey Madden, Kate Mitchell Mehle

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, Loren Steck

Northern Monterey County Foundation Advisory Council

Danielle Vierra (Chair), Glen Alameda, Chuck Allen, Ricky Cabrera, Don Chapin,

Glenn Church, Kathy Genasci, Anne Herendeen, Nick Kambic, Wyatt Meiggs, Karen Miller, John Phillips, Brian Smith, Phil Tavarez

Scholarships

Daniella Kuska, Betsy Buchalter Adler, Eric Mora, Dr. Celia Barberena, Nettie Porter, Susan Dooley

Siembra Latinos Fund Advisory Council

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

Southern Monterey County Foundation Advisory Council

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

Robert and Virginia Stanton Endowment Committee

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

Big Sur Fund in Memory of Weston Call Advisory Council

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

Women's Fund Leadership Council

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



Grow with us Your Partner in Philanthropy

Generous givers 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 to learn more.

Start a Fund: It's Simple

• 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, 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.

• 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.

• 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.

In Memoriam

We thank these friends of the CFMC for their support and partnership.



Robert P. Balles
Legacy Society member



Thomas Paul Bohnen
Former CFMC Board member



Patricia Tynan Chapman
Former CFMC Board member
Legacy Society member
Distinguished Trustee Recipient



Peter James Coniglio
Former CFMC Board member



Joel S. Gambord
Fundholder
Legacy Society member



Louis H. Huntington, Jr.
Friend of the Foundation



Colburn A. Jones
Fundholder
Legacy Society member



Butch Kronlund
Friend of the Foundation



William B. Mitchell
Fundholder
Former CFMC Board member



Connie Shelstad
Legacy Society member



Dolores Tottino
Fundholder



Dr. Jim Tunney
Fundholder



William H. Tyler III
Fundholder
Distinguished Trustee Recipient



David Zaches
Fundholder

Not pictured:

Joanne Kay Juarez, Fundholder
Harriet Mitteldorf, Friend of the
Foundation

Ana M. Weidner, Fundholder
Michael Willemsen, Fundholder



Our Values

Advance **positive change** through grantmaking, community engagement and collaboration.

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

Operate with the highest standards of **integrity, ethics and accountability.**

Embrace **diversity, equity and inclusion.**

Commit to **fairness and respect** for the dignity of all people.

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

We strive for excellence in all that we do.



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



cfmco.org



2354 Garden Road, Monterey, CA 93940



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HEALTHY, SAFE, VIBRANT
COMMUNITIES