

ANNUAL REPORT

2019
2020

**2019-2020
Annual
Report**

**THE
COMMUNITY
FOUNDATION**

MARTIN
ST. LUCIE



Elizabeth A. Barbella
President & CEO

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Following four years of steady triple-digit growth, we see this trend continuing as philanthropists discover the power of working through The Community Foundation. The Foundation has welcomed new individuals, families and corporations into our Fund family at a record rate. Since 2017, we have seen a 252% increase in the number of new charitable giving fund accounts established.

We have experienced the most growth in three areas: donor advised fund accounts, giving circles, and courage funding that supports start-up research and projects showing promise.

We have experienced an increase of 137% since 2017 in our overall asset base that has been bolstered by strong investment performance, which has met or exceeded industry benchmarks. The results of this growth are extraordinary.

In partnership with our Fundholders, clients and friends, we facilitated the largest number of grant and scholarship awards in our organization’s history, totaling \$2.4 million.

We have witnessed funders – individually and collectively – demonstrate remarkable innovation and inspiration in addressing emerging needs in our local communities. Not the least of these has been an immediate, heartfelt and powerful response to those impacted by the COVID-19 pandemic. The Community Foundation has brought together funders and nonprofits in extraordinary ways (see pages 3-4), creating a philanthropic synergy that will benefit our area for years to come.

At the heart of our growth is a simple, straightforward promise: Gifting through The Community Foundation simplifies charitable giving, reduces taxes and ensures that grants go to qualified, vetted nonprofits. This message strikes a chord with those who want to make the most of their charitable giving, using the resources of a trusted and proven partner with a unique insight into the philanthropic landscape.





Ellyn Stevenson
Chair,
Former Health Care Executive

INNOVATION

In the wake of a strong economy and innovative ideas emerging from nonprofits and fundholders, we saw “start-up” philanthropy take hold this year on the Treasure Coast. More grants than ever seeded early stage projects that show promise. It is a trend we expect to grow as fundholders discover the joy of “giving while living.”

Instigators, the moniker we give fundholders willing to take some risk with new ideas, were richly rewarded with the satisfaction of seeing projects come to life that will benefit area residents for years to come. Examples of this innovative funding include:

- A unique four-year scholarship program that works with at-risk students who show great promise but face challenges that traditionally derail attaining a college education.
- A grant seeding Dr. Edie Widder’s groundbreaking research at the Ocean Research Conservation Association on the effects of blue-green algae on human health, which led to a substantial EPA Environmental Justice grant to support further research.
- A grant funding the construction of a packing house at House of Hope’s farm in Palm City to ensure low income residents’ access to fresh and healthy food, affording long-term health benefits for generations.

We salute the instigators who are sparking new approaches to old problems. They have taken the road less traveled and – as in the Robert Frost poem – it has made all the difference.

A Circle of Giving

Giving

Circles are growing in number on the Treasure Coast, and The Community Foundation is leading the way. We have been instrumental in the formation of Impact 100 chapters in Martin and St. Lucie, as well as the Treasure Coast Philanthropy Circle.

We are also working with communities that have established private foundations and charitable giving and/or scholarship funds, including Mariner Sands, the Sailfish Point Foundation, the Turtle Creek Club and Willoughby Foundation. We provide them with a variety of services, including administrative support, grant and scholarship process management, tools, research and access to subject matter expertise.

Nearly \$873,500 has been invested by these groups since 2017, all for the betterment of our community. This is the power of collective giving.



“COVID-19 has forced all of us out of our comfort zones and given us an opportunity to create a better way of working together for the common good.” - Elizabeth A. Barbella, President & CEO

INSPIRATION

The response of fundholders in addressing COVID-19's impact on our region has been immediate and profound. The Community Foundation has led the charge, bringing together a range of funders – individuals, family foundations, corporations and giving circles – to streamline grantmaking, meet philanthropic priorities, and ensure that grants are efficiently directed to where they are needed most.

- In March 2020, we established the COVID-19 Rapid Response Fund, seeded by Andrew and Robin Hunt and the Lichtenberger Family Foundation.
- We designed, organized and launched a universal application for nonprofit organizations to apply for financial support due to fallout from COVID-19.
- We established and provide ongoing management to Funders' Consortiums in Martin and St. Lucie Counties. Consortium members meet regularly to assess incoming COVID-related grant applications, determine the areas of greatest need, and provide funding either individually or collectively.

Throughout this process, we have been inspired not only by the generosity of our community, but by the collaborative spirit of funders and nonprofits alike. Our entire region benefits from the synergy they have created as they work together, sharing knowledge, connections and resources.

Leaders in Philanthropy

THE COMMUNITY FOUNDATION'S COVID-19 RAPID RESPONSE FUND

Grants Awarded: 51
Total Funding: \$536,728*

Andrew and Robin Hunt Philanthropic Fund
Lichtenberger Family Foundation
Christen M. Price Memorial Fund
Mr. and Mrs. Robert Crandall
Mr. and Mrs. John and Connie Doody
Florida Power & Light
Mr. and Mrs. Peter and Gayle Grimm
Gordana Uscumlic Foundation
Mr. and Mrs. John Loewenberg
Mariner Sands Charity Week
Minnow Fund
Morgridge Family Foundation
Plantation at Sewall's Point
Peter W. Busch Family Foundation
Rev. and Mrs. David A. Rich, Sr.
Mr. and Mrs. Ray and Ellyn Stevenson
Mr. and Mrs. Horace and Bunny Webb
Mr. and Mrs. Robert Weissman
23 Anonymous Contributors

COVID-19 FUNDERS' CONSORTIUMS

Martin County
Organizations Funded: 29
Total Funding: \$980,033*

Allegany Franciscan Ministries
Bank of America
Children's Services Council of Martin County
Cleveland Clinic - Martin Health
Community Foundation for Palm Beach & Martin Counties
Hobe Sound Community Chest
Impact 100 Martin
Lost Tree Village Charitable Foundation
Mariner Sands Charity Week
Sailfish Point Foundation
The Community Foundation Martin - St. Lucie
United Way of Martin County

St. Lucie County
Organizations Funded: 32
Total Funding: \$727,645*

Allegany Franciscan Ministries
Bank of America
Children's Services Council of St. Lucie County
Cleveland Clinic - Martin Health
Impact 100 St. Lucie
The Community Foundation Martin - St. Lucie
United Way of St. Lucie County

Grants have been issued for equipment, personal protection equipment (PPE), sanitization items, computer technology and COVID-related direct service expenses (i.e., basic human needs, health and mental health).

*As of June 30, 2020. Detailed grant information is available on www.tcfmsl.org.

The Foundation, in partnership with members of the Funders' Consortiums, is managing the ordering and delivery of PPE supplies for those nonprofit organizations in Martin and St. Lucie Counties that have no established PPE vendor relationships. Supplies ordered include bleach, diapers, hand sanitizer, masks, paper towels, sanitizing sprays and wipes, and touchless thermometers. To date, over 100,000 units of PPE have been distributed with more to come.



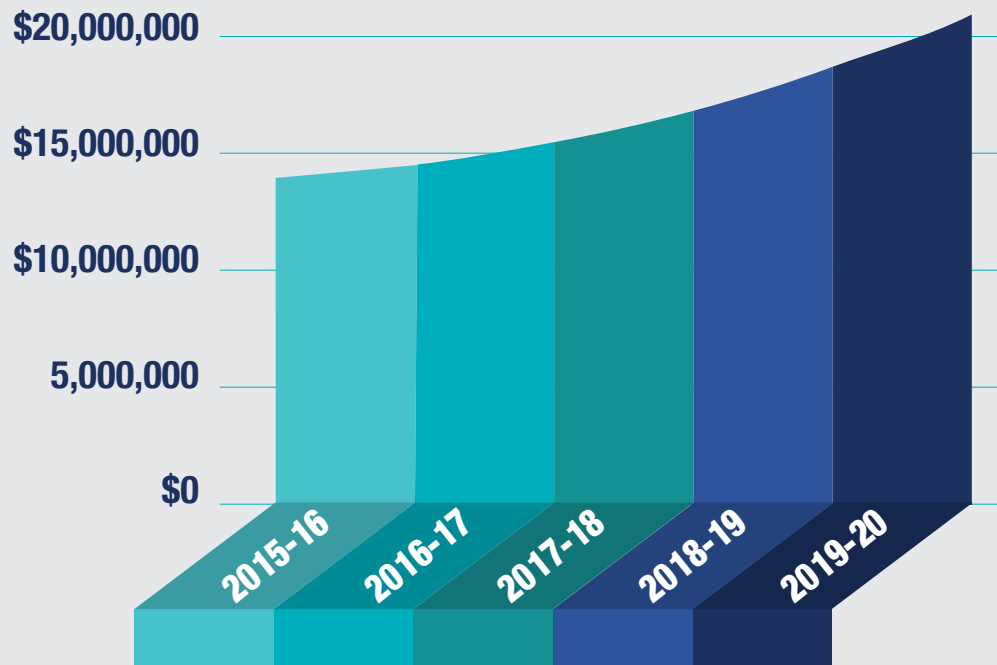
Michael A. Kelly
Investment Committee Chair,
Private Investor

The Investment Committee of The Community Foundation remains committed to providing seasoned oversight and a highly informed perspective with respect to our collective assets. We are focused on tailoring our services to meet the unique needs of our clients, whom we call Fundholders. We offer conservative, moderate and aggressive investment pool options. We work with our Fundholders and/or their wealth managers to create portfolios that best align with their risk tolerances and charitable giving aspirations.

Our Fundholders saw their philanthropic investments meet or exceed performance targets this past year ending June 30, 2020. Early in the year, the relatively strong economy, along with highly accommodative Central Banks globally, provided a constructive environment for capital markets across most asset classes. Performance during this period provided the insulation for fund accounts to weather periods of volatility experienced in the spring, due in large part to the pandemic. Going forward, we remain confident that our respective asset allocations are optimally positioned for long-term performance.

INVESTMENT

Annual Balance AT END OF FISCAL YEAR



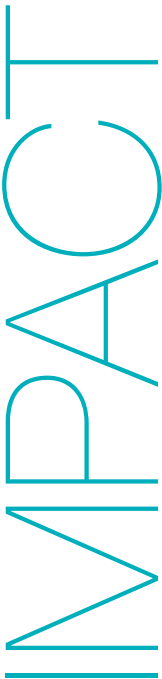
25 United Disaster Relief Fund [ACLU Foundation of Florida](#) Advocates for Victims of Assault [Aid for Kids](#) Alameda Health [All Saints Episcopal Church](#) Alzheimer's Association - SE Florida [Alzheimer's Community Care](#) America SCORES [American Cancer Society](#) American Cancer Society - Florida [American Cancer Society - Martin/Okeechobee Unit](#) American Diabetes Association [American Foundation for Suicide Prevention](#) American Friends of Magen David Adom [American Heart Association](#) American Heart Association - Florida Affiliate [American Lung Association - Southeast Florida](#) American Red Cross - Martin County [American Red Cross - St. Lucie County](#) Amyotrophic Lateral Sclerosis Association [Apollo School Foundation, Inc.](#) Arthritis Foundation - Mideastern Region [Artists 4 A Cause](#) Arts Council of Martin County [Atlantic Classical Orchestra](#) Audubon Society of Martin County [Banner Lake Club / BLAST](#) Berkeley-Carroll Street School [Beyond Borders](#) Big Brothers Big Sisters of Palm Beach and Martin Counties [Boston College](#) Boys & Girls Clubs of Martin County [Boys & Girls Clubs of Palm Beach & Martin Counties](#) Boys & Girls Clubs of St. Lucie County [Brianna Cooper Heavenly Smiles Foundation](#) Bridge Christian Outreach [Brightfocus Foundation](#) Brooklyn Queens Conservatory of Music [Bullsugar Alliance, Inc.](#) Buoniconti Fund To Cure Paralysis, Inc. [Calvary Fund, Inc.](#) Camp Boggy Creek CARE [Caring Children Clothing](#) [Children Inc](#) Caring Fields Animal Sanctuary [Caring Fields Felines, Inc](#) CASTLE [Catch the Wave of Hope](#) Celebrities Fore Kids [Centenary United Methodist Church](#) Center for Court Innovation/Fund for the City of New York [Charcot-Marie-Tooth Association](#) Children's Craniofacial Association [Children's Emergency Resources](#) Club Managers Association of America [Coastal Carolina University](#) College of Mount St. Vincent [Community Foundation for Palm Beach and Martin](#) Community Foundation of the Florida Keys [Convoy of Hope](#) Council on Aging of Martin County at the Kane Center [Cure Alzheimer's Fund](#) Deana's Educational Theater [Dept of Business & Prof Regulations](#) Disabled American Veterans [Disaster Relief Fund](#) Divestment Student c/o Alliance for Global Justice Network [Dogs and Cats Forever](#) Dominican Sisters of Houston [Domino's Cat Rescue League, Inc.](#) Dunbar Center, Inc. [E.N.D. IT! Corporation](#) Elliott Museum [Environmental Studies Council, Inc.](#) Episcopal Church of the Nativity [Equine Rescue & Adoption Foundation](#) Evangelical Lutheran Church in America [Family Meals Inc](#) Family Promise of Martin County [Fellowship of Christian Athletes](#) Fistula Foundation [Florida Arts & Dance Company](#) Florida Atlantic University [Florida Gulf Coast University](#) Florida Oceanographic Society, Inc. [Florida Sheriff's Youth Ranches, Inc.](#) Florida State University [Florida State University Foundation](#) Fonkoze USA-CLM Project [Food Bank for New York City](#) Friends of Puerto Rico [Friends of the Martin County Library System](#) Gertrude Walden Child Care Center [GFWC Woman's Club of Stuart](#) Global Giving Foundation [Gold Coast Professional Schools](#) Grace Place [Granville Little League](#) Greater Houston Community Foundation [Guardians for New Futures](#) Habitat for Humanity of Martin County, Inc. [HANDS of St. Lucie County](#) Harbor Branch Oceanographic Institute Foundation [Healthy Start Coalition of St. Lucie County](#) Heart to Heart International, Inc. [Heifer International](#) Helping People Succeed [Hibiscus Children's Center](#) Historic Preservation Foundation of North Carolina [Historical Society of Martin County](#) Hobe Sound Animal Protection League, Inc. [Hobe Sound Childcare Center](#) Hobe Sound Early Learning Center [Hope Rural School](#) Hospice Foundation of Western New York Inc [Hospice of Palm Beach County](#) House of Hope, Inc. [Humane Society of St. Lucie County](#) Humane Society of the Treasure Coast [Impact 100 Martin](#)

[Impact 100 St. Lucie](#) [In the Image of Christ](#) Indian River State College [Indian River State College - Fire/EMT Scholarships](#) Indian River State College Foundation [Iona College](#) Kamryn Kares [Keiser University](#) Laura Riding Jackson Foundation, Inc. [Lehigh University](#) Leukemia & Lymphoma Society [Library Foundation of Martin County](#) LifeBuilders of the Treasure Coast, Inc. [Light of the World Charities](#) Lighthouse ArtCenter [Lighthouse Centers of America](#) Lighthouse for the Blind of the Palm Beaches [Lighthouse Foundation, Inc.](#) Lindsay School of the Arts Inc [Literacy for Incarcerated Teens](#) Love And Hope In Action [Lungevity Foundation](#) Macalester College [Make-A-Wish Southern Florida](#) March of Dimes, Inc [Mark Garwood SHARE Foundation](#) Martin County Board of County Commissioners [Martin County Healthy Start Coalition](#) Martin County Police Athletic League Inc [Martin Health Foundation](#) Martin Memorial Health Systems [Mary's Shelter of the Treasure Coast](#) Medical Bridges [Memory Bridge](#) Molly's House [Mustard Seed Communities Inc](#) Mutt Maddness [National Multiple Sclerosis Society](#) New Horizons of the Treasure Coast, Inc. [Nina Haven Scholarships, Inc.](#) Norton Museum of Art, Inc [Ocean Research & Conservation Association](#) Operation 300 Inc [Operation Smile](#) OutFront Minnesota Community Services [PACE Center for Girls, Treasure Coast](#) Palm City Presbyterian Church [Peace Presbyterian Church](#) People for the American Way [PERC, Inc](#) Planned Parenthood [Planned Parenthood of South Florida & Treasure Coast](#) Prince of Peace Lutheran Church [Project L.I.F.T.](#) Puppies Behind Bars [Rainforest Foundation](#) Reach Out and Read [Real Life Children's Ranch](#) Redeem the Shadows [Restoring the Village](#) [Impact Fund](#) Robert L Sweeney Memorial Fund Inc [Rollins College](#) Roosevelt University [Ross University](#) Roundtable of St. Lucie County [SafeSpace, Inc.](#) Saint Edwards School [Salvation Army of Martin County](#) [Salvation Army of St. Lucie County](#) [Samaritan Center for Young Boys & Families](#) Samaritan Ministry of Greater Washington [Sandy Hook Promise Foundation](#) Santa Fe Community College [Savannah College of Art & Design](#) Save the Children [Shriners Hospital for Children](#) Smithsonian Institution [South University - Tampa](#) Southern Poverty Law Center [Southwest Church of Christ](#) Special Operations Warrior Foundation [St. Anne's Church](#) St. Joseph's Catholic Church [St. Jude Children's Research Hospital](#) St. Lucie County Hundred Club [St. Lucie County Education Foundation Inc](#) St. Lucie Habitat for Humanity [St. Martin de Porres Catholic Church](#) St. Mary's Episcopal Church [St. Matthew's House](#) St. Vincent de Paul Society [StarStruck Theatre, Inc.](#) Steve Hirsch Memorial Fund at Bread for the City [Surfers for Autism II](#) Susan G. Komen/Ride for the Cure [TCFMSL Institute for Not for Profit Leadership Fund](#) Temple Beit HaYam [The ARC of Martin County](#) The Children's Museum of the Treasure Coast [The Education Foundation of Martin County](#) The Episcopal Church of the Nativity [The Everglades Foundation](#) The First Tee - New Hampshire [The First Tee / Children's Golf Foundation](#) The First Tee / CR Jrs Chip Inc [The Friends of the Lyric](#) The Grace Place [The Heritage Foundation](#) The Hope Center for Autism [The Inner Truth Project](#) The Joseph A. Catrambone Scholarship Fund [The Lyric Theatre](#) The Nature Conservancy - Florida Chapter [The Ohio State University](#) The Osborne Association [The Pine School](#) Treasure Coast Food Bank [Treasure Coast Hospice](#) Treasure Coast Manatee Foundation [Treasure Coast Philanthropy Circle](#) Trinity College [Tykes & Teens](#) UNICEF [United Against Poverty, Inc](#) United Way of Martin County [United Way of Palm Beach County](#) University of Arkansas Community College Rich Mountain Foundation [University of Central Florida](#) University of Colorado Hospital [University of Florida](#) University of Louisville Foundation Inc. [University of Miami](#) University of North Florida [University of South Florida](#) University of West Florida [US Fund for UNICEF](#) US Sailing Center of Martin County, Inc. [Valencia Community College](#) Variety Boys & Girls Club of Queens [Visiting Nurse Foundation](#) Volunteers in Medicine [Water1st International](#) West Virginia Wesleyan College [Willoughby Foundation Scholarship Fund](#) Winston-Salem State University [Women Supporting the Arts](#) World Central Kitchen, Inc [World Food Program USA](#) WQCS-NPR for the Treasure Coast [WXEL PBS for the Palm Beaches](#) YMCA of the Treasure Coast

\$2.4 Million

IN GRANTS AND SCHOLARSHIPS AWARDED

- Animal Welfare & Environment - **23.02%**
- Arts & Culture - **2.89%**
- Education - **14.22%**
- Faith Based - **1.66%**
- Health & Wellness - **13.20%**
- Human Services - **24.76%**
- Research & Advocacy - **3.50%**
- Scholarship - **16.75%**



OUR MISSION IS TO
INSPIRE PHILANTHROPY
through the establishment
of charitable giving funds
to impact communities.



851 SE Monterey Commons Blvd. | Stuart, FL 34996
772.288.3795 | [TCFMSL.org](https://www.tcfmsl.org)



Board of Directors 2019-2020 John Doody, Jack Forde, Brian Foss, Kate Freihofer, Linda Houston, Mike Kelly, Thomas Lytle, Ken Norman, Nancy Crowder-McCoy, Joe Paskoski, Ellyn Stevenson, Gytha Von Aldenbruck, Bunny Webb

Emeritus Board Evans Crary, Jr., Mike Crook, Bill Fowler, Bud Jordan, Tom Weber

Staff Robin Cartwright, Director of Programs, Ellen Gundrania, Senior Program Associate