we received sad news that caused us to reflect on our past, our purpose and our work. On November 14, our beloved founder, Floyd “Bud” Jordan, passed away.

This year’s annual report is now dedicated to him. I am humbled when I reflect on all the good work done by one man. Many benefited from his strong mind and generous heart. Bud was many things—a family man, a principled and committed man, and always, a man who understood the importance of joy.

With the help of a few good friends and his strong beliefs, Bud created The Community Foundation so donors could support charities during their lifetime and after. Here we are 34 years later. Hundreds of charities and thousands of individuals have been touched by over $20 million of philanthropic activity guided by The Foundation. Today, we proudly partner with more than 130 individuals, families and businesses to manage their charitable giving.

This year and every year, we will pay our deepest respects and thank those who are the “doers” and “givers,” like Bud. And we’ll move forward with his words ringing in our ears, “Great job. Keep up the good work.”

Days before this annual report began making its way to the printer,

Elizabeth A. Barbella
President & CEO

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**Asset Base**

+191%

to $30.4 Million in 2021

**Established Fund Accounts**

+230%

to 132 accounts

**Grants & Scholarships Awarded**

+913%

to $3.9 Million

**Nonprofit Leadership Training/Development**

Invested $332,750 since January 2020,
benefiting 17 organizations

The Community Foundation Martin - St. Lucie values the collective impact resulting from collaboration with external scholarship entities. The Foundation has facilitated $383,657 in scholarships in partnership with the Nina Haven Foundation, the Sailfish Point Foundation and The Rodney M. Gould Foundation.
The Community Foundation Investment Committee is composed of board members with seasoned expertise in the areas of finance, wealth management, law and business. They are committed to performing their roles as fiduciaries at the highest level. They provide oversight and highly informed perspectives with regard to managing our collective assets. Their work is guided by comprehensive investment policies and advice from CAPTRUST, an external investment consultant.

The Community Foundation of Martin - St. Lucie offers several portfolios, from conservative to aggressive. The fiscal year results for donors and agencies ranged from a low of 13.67% in the Conservative Growth and Income portfolio to a high of 28.03% in the actively managed Moderate Growth and Income portfolio. In all cases, our portfolios outperformed the metrics established by the Investment Committee for evaluating performance.

We continue to be confident that our respective asset allocations are optimally positioned for long-term performance going forward.

The performance of our investment pool options is of paramount importance to our clients, as it allows their funds and the grants they provide to grow. Equally important to our philanthropic partners is the value added through The Community Foundation’s fully customized concierge services, including:

- Personal philanthropic guidance
- In-depth reporting and research, including site visits
- Collective giving opportunities
- Connections to high-impact programs and projects
- In-depth knowledge of the local charitable landscape
- Ability to work with an established wealth manager
- Anonymous giving options
This past year has reminded us all of the importance of connections: as individuals, as families and as a community. These connections shape us, they influence and inspire us, and they allow us to have a greater collective impact on the world around us.

Many of our partners came to The Community Foundation with a desire and an idea of how to affect tangible and meaningful change in our community. Each has a personal story that led to the creation of a new and focused fund that others can join in supporting, now and for years to come. They entrusted us with their unique vision, and we were honored to bring together the people and organizations that ensure these funds succeed.

These new funds represent the myriad of challenges we face today, such as: the environment, basic and unanticipated community and human needs, land conservation, and wildlife. We are grateful to our fundholders for their foresight, their long-term commitment and their belief in our community’s future. They join a family of funds that has grown consistently over the past five years.

**New Specialty Funds**

The philanthropists who created the following funds did so with the intention that other donors would join them in contributing to the funds – allowing for greater impact into the future.

**Wildlife Fund**

Stephen Stock’s deep appreciation for the value of wildlife led him to launch this Fund in 2021. The Fund supports the protection and preservation of wildlife and related land conservation.

**ERIC Fund**

In 2020, Judie and Gary Price established this Fund to support charitable organizations that provide basic needs, including the provision of shelter and access to food, clothing, health care and other services.

**Forever Fund**

Established in 2020 by Peter and Gayle Grimm, this endowed Fund was created to address future and unanticipated community needs.

**Environmental Action Fund**

Two concerned residents created this Fund in 2019 to address environmental issues on the Treasure Coast through research and education, with a particular focus on water quality and the environment’s impact on human and animal health.
In partnership with our Founders, The Community Foundation has issued grants and scholarships that have impacted hundreds of nonprofits, educational institutions and faith-based organizations in our community, across the state and around the world.

$3 Million IN GRANTS AND SCHOLARSHIPS AWARDED

Animal Welfare & Environment – 9.3%
Arts & Culture – 7.8%
Capacity Building – 7.5%
COVID-19 – 3.3%
Education, Literacy & Scholarships – 13.1%
Faith-Based – 1.7%
Health & Wellness – 11.9%
Human Services – 43.4%
Research & Advocacy – 2%

The Episcopal Church of the Nativity The Everglades Foundation The First Tee-Children’s Golf Foundation The First Tee-Florida The First Tee-New Hampshire The Friends of the Lyric The Friends of the Martin County Library System Garrett County Maryland Community Action Committee Gentle Giants Draft Horse Rescue Society Gertrude Walden Child Care Center GFWC Woman’s Club of Stuart Global Health Initiative Gulf of Mexico Research Laboratory Hobe Sound Early Learning Center Hope Center for Autism Hope Rural School Horry-Georgetown Technical College Hospice Foundation of Western New York Hospital of Palm Beach County Foundation House of Hope Humane Society of St. Lucie County Human Society of the Treasure Coast Imperial Luminaries of Martin County Intimate Interiors Internationals Island Impact Ministries Jesus House of Hope John Carroll Catholic High School Jupiter Medical Center Foundation Kamryn Kare’s Keiser University Ken Duke and Friends Kieve-Vavau Educa...
Bud Jordan’s Legacy

Bud Jordan’s far-reaching impact stretches beyond his role in founding The Community Foundation in 1988. From the moment he and his wife Marjie moved to Martin County in 1971, they worked to better our community in countless ways, including initiatives addressing education, the environment, health care and the arts.

He recognized the treasure of our waterways and the threats to their survival. Decades ago, he co-founded the St. Lucie River Initiative (now the Rivers Coalition). In 2019, he doubled down on his commitment to clean water by co-founding the Environmental Action Fund at The Community Foundation. Its goal is to support research that provides actionable data and projects that ensure ongoing education.

Bud’s good works will carry on for generations to come. Visit TCFMSL.org to learn more about his legacy.