

# ANNUAL REPORT

2020  
2021

THE COMMUNITY  
FOUNDATION  
MARTIN | ST. LUCIE

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



**Elizabeth A. Barbella**  
President & CEO

A handwritten signature in black ink that reads "Elizabeth A. Barbella".

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.”

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

\*% for 2017-2021

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



**Michael A. Kelly**  
*Private Investor, ArbCap*  
Investment Committee Chair  
for Fiscal Year 2020-2021

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.

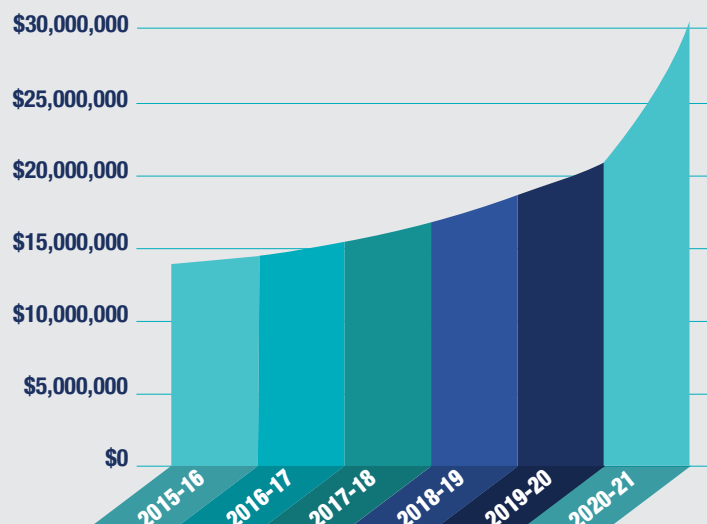
The Community Foundation of Martin - St. Lucie offers several portfolios, from conservative to aggressive. The fiscal year results for donors and agencies ranged from a low of 13.67% in the Conservative Growth and Income portfolio to a high of 28.03% in the actively managed Moderate Growth and Income 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.



**Linda Houston**  
*Former Executive and Wealth Advisor, Merrill Lynch*  
Investment Committee Chair  
for Fiscal Year 2021-2022

## Asset Base AT END OF FISCAL YEAR



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:



**Ellyn Stevenson**  
Chair  
*Former Health Care Executive*

A handwritten signature of Ellyn Stevenson in black ink.

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.



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.



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.



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



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 fundholders, 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 country and around the world.

21 Plus Inc. Foundation 211 Palm Beach/Treasure Coast 4Kids of South Florida 85th U.S. Army Special Forces AABC Foundation Abington Memorial Hospital Foundation ACLU Foundation of Florida Advocates for Victims of Assault AFP Treasure Coast Chapter Aid for Kids Alameda Health System Foundation All Saints Episcopal Church Allegany College of Maryland Allen Jackson Ministries Alzheimer's Association-Southeast Florida Alzheimer's Community Care Amazon Conservation Team America SCORES American Cancer Society American Center for Law and Justice American Diabetes Association American Foundation for Suicide Prevention American Friends of Magen David Adom American Heart Association American Lung Association-Southeast Florida American Red Cross of Martin and St. Lucie Amyotrophic Lateral Sclerosis Association Arthritis Foundation of Florida-Mideastern Region Artists 4 A Cause Arts Foundation of Martin County Atlanta Community Food Bank Atlantic Classical Orchestra Audubon Society of Martin County Autism Speaks Banner Lake Club Benedictine Sisters Berkeley-Carroll Street School Beyond Borders Big Brothers Big Sisters of Palm Beach and Martin Counties Big Dog Ranch Rescue Boston College Boys & Girls Clubs of Martin County Boys & Girls Clubs of St. Lucie County Boys Town of South Florida Bread for the World Institute Brianna Cooper Heavenly Smiles

Foundation Bridge Christian Outreach Brightfocus Foundation Brookgreen Gardens Brooklyn Queens Conservatory of Music Bullsugar Alliance Buoniconti Fund to Cure Paralysis Calvary Fund Cambridge College of Healthcare & Technology Camp Boggy Creek Cancer Research Institute CARE Carebag Caring Children Clothing Children Caring Fields Felines Casey Cares Foundation Castle Catch the Wave of Hope Catholic Charities of the Diocese of Palm Beach Celebrities Fore Kids Centenary United Methodist Church Center for Court Innovation Chabad Jewish Center of Martin-St. Lucie Counties Charcot Marie-Tooth Association Children International Children's Craniofacial Association Children's Emergency Resources Children's Golf Foundation Children's Hope Alliance Children's Hospital of Wisconsin Christian Broadcasting Network Cleveland Clinic Martin Health Foundation Club Managers Association of America Coastal Carolina University College of Mount St. Vincent Committee to Protect Journalists Community Foundation for Palm Beach and Martin Counties Community Foundation of the Florida Keys Convoy of Hope Council on Aging of Martin County Covenant House Florida Cross International Cure Alzheimer's Fund Deana's Educational Theater Department of Business and Professional Regulation Des Moines School District Disabled American Veterans Divestment Student Network Dogs and Cats Forever Dominican Sisters of Houston Domino's Cat Rescue League Duluth Playhouse Dunbar Early Learning Center Dunklin Memorial Church E.N.D. IT Corporation Easter Seals Florida Eckerd Youth Alternatives Education Foundation-of Martin County Elev8Hope Environmental Studies Council Episcopal Church of the Nativity Epoch Times Association Equine Rescue & Adoption Foundation Evangelical Lutheran Church in America Exceptional Academy for Differently-Abled Learners Fairchild Tropical Botanical Garden Faith in Florida Family Meals Family Promise of Martin County Father Flanagan's Boys' Home Florida Feed The Children Fellowship of Christian Athletes First Lutheran Church First United Methodist Church of Stuart Fistula Foundation Florida Arts & Dance Company Florida Atlantic University Florida Gulf Coast University Florida International University Florida Oceanographic Society Florida Sheriff's Youth Ranches Florida State University Fonkoze USA Food Bank for New York City Fort Pierce Central High School Friends of Puerto Rico Friends of the Everglades Friends of the Lyric 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 Healthy Living Foundation GlobalGiving Foundation Gold Coast Professional Schools Good Shepherd School-Inwood Grace Place GraceWay Village Granville Little League Greater Houston Community Foundation Greater New York Councils, Boy Scouts of America Guardians for New Futures Habitat for Humanity of Martin County HANDS of St. Lucie County Hanna Boys Center Harbor Branch Oceanographic Institute Foundation Healthy Start Coalition of St. Lucie County Heart to Heart International Helping People Succeed Heritage Foundation Hibiscus Children's Center Historic Preservation Foundation of North Carolina Historical Society of Martin County/Elliott Museum Hobe Sound Animal Protection League Hobe Sound Early Learning Center Hope Center for Autism Hope Rural School Horry-Georgetown Technical College Hospice Foundation of Western New York Hospice of Palm Beach County Foundation House of Hope Humane Society of St. Lucie County Humane Society of the Treasure Coast Immanuel Lutheran Church Impact 100 Martin Impact 100 St. Lucie In The Image of Christ Indian River State College Iona College Island Impact Ministries Jesus House of Hope John Carroll Catholic High School Jupiter Medical Center Foundation Kamryn Kares Keiser University Ken Duke and Friends Kieve-Wavus Education Kiwanis

Club of Banner Elk Foundation Kiwanis Club of Stuart Florida Foundation Know Thyself As Soul Foundation International Laura Riding Jackson Foundation Lehigh University Leukemia & Lymphoma Society Library Foundation of Martin County Life Outreach International Association of Churches LifeBuilders of the Treasure Coast LifeQuest Church Light of the World Charities Lighthouse ArtCenter Lighthouse Centers of America Lighthouse for the Blind of the Palm Beaches Lighthouse Foundation Lindsay School of the Arts Literacy for Incarcerated Teens Loggerhead Marine Life Center Love and Hope in Action Lungevity Foundation Macalester College Make-A-Wish Southern Florida-Southwest Florida March of Dimes Mariner Sands Chapel Mark Garwood Share Foundation Martin County Healthy Start Coalition Martin County Police Athletic League Mary's Shelter of the Treasure Coast Masonic Charities of Florida Medical Bridges Memory Bridge Molly's House Multi-Cultural Resource Center for Children & Families Muscular Dystrophy Association Mustard Seed Ministries of Fort Pierce Mutt Madd-ness Dog Rescue National Association for the Advancement of Colored People National Jewish Health National Multiple Sclerosis Society New Horizons of the Treasure Coast Nina Haven Scholarships Northwestern University Norton Museum of Art Notley Fund Nova Southeastern University Nurse

Assistant Training School Ocean Research & Conservation Association Okeechobee Main Street Operation 300 Operation Smile Our Community Table OutFront Minnesota Community Services PACE Center for Girls, Treasure Coast Palm City Presbyterian Church Parent to Parent of the Treasure Coast Peace Presbyterian Church People for the American Way PFLAG PGA Foundation Place of Hope Planned Parenthood Prince of Peace Lutheran Church Princeton University Project LIFT Property and Environment Research Center Puppies Behind Bars Rainforest Foundation Reach Out and Read Real Life Children's Ranch Redeem the Shadows Rivers Coalition Defense Fund Robert L. Sweeney Memorial Fund Rollins

College Roosevelt University Ross University Rotary International Roundtable of St. Lucie County SafeSpace Sailfish Point Foundation Saint Edwards School Salvation Army Samaritan Center for Young Boys & Families Samaritan Ministry of Greater Washington Samaritan's Purse Sandy Hook Promise Foundation Santa Fe State College Savannah College of Art & Design Save the Children Seminole Boosters Shriners Hospitals for Children Smithsonian Institution Socially Responsible Investment Coalition Soroptomist International of the Americas South Florida PBS - WXEL South University-Tampa Southern Poverty Law Center Southwest Church of Christ Special Operations Warrior Foundation St. Anne's Church St. Elizabeth Ann Seton Catholic Church St. Helen Catholic Church St. Joseph's Catholic Church St. Jude Children's Research Hospital St. Lucie County CISM Team St. Lucie County Education Foundation St. Lucie County Hundred Club St. Lucie Habitat for Humanity St. Mary's Episcopal Church St. Matthew's House St. Petersburg College St. Vincent de Paul Society of St. Joseph's County StarStruck Theatre Steve Hirsch Memorial Fund at Bread for the City Summit Montessori Teacher Training Institute Suncoast Basset Rescue Suncoast Mental Health Center Surfers for Autism II Susan G. Komen Suzanne J. Kitchen and Donna E. Stevick Charitable 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-Children's Golf Foundation The First Tee-CR Jrs. Chip The First Tee-New Hampshire The Friends of the Lyric The Grace Place The Heritage Foundation The Historic Preservation Foundation of North Carolina The Hope Center for Autism The Inner Truth Project The McIntees Create A Brighter Future for Our Kids The Nature Conservancy Florida The Ohio State University The Osborne Association The Pine School The Refuge Ranch The Stephen Siller Tunnel to Towers Foundation The Village Club & Preserve Treasure Coast Food Bank Treasure Coast Giving Circle Treasure Coast Hospice Treasure Coast Manatee Foundation Treasure Coast Wildlife Hospital Tri-County Animal Rescue Trilogi Genesis Trinity College Tri-State Basset Hound Rescue Trustees of the University of Pennsylvania Turning Point USA Tykes & Teens UNICEF Union Grove Campground Association United Against Poverty United Service Organizations United Way of Greater Atlanta United Way of Martin County United Way of Palm Beach County United Way of St. Lucie County University of Alabama University of Arkansas University of Central Florida University of Colorado Hospital Foundation University of Florida University of Louisville Foundation University of Miami University of North Florida University of South Florida University of West Florida US Sailing Center Martin County USO World Valencia Community College Variety Boys & Girls Club of Queens Visiting Nurse Foundation Volunteers in Medicine Wake Forest School of Medicine Water1st International West Virginia Wesleyan College WETA Winston-Salem State University Women Supporting the Arts Worcester Public Library Foundation World Central Kitchen World Food Program USA World Golf Foundation WQCS NPR for the Treasure Coast YMCA of the Treasure Coast

## \$3.9 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%



# OUR MISSION IS TO INSPIRE PHILANTHROPY

through the establishment of charitable giving funds to impact communities.



## 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.

## Board of Directors 2020-2021

Ellyn Stevenson, Chair  
John Doody, Vice Chair  
Jack Forde, Vice Chair  
Joe Paskoski, Treasurer  
Theora "Bunny" Webb, Secretary  
Nancy Crowder-McCoy  
Brian Foss  
Kate Freihofer  
Linda Houston  
Mike Kelly  
Thomas Lytle  
Ken Norman  
John Tranter  
Gytha Von Aldenbruck

## Emeritus Board

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

## The Community Foundation Staff

Elizabeth Barbella, *President & CEO*  
Ellen Gundrania, *Program Officer*  
Lauren McGinnis, *Program Associate*  
Jacqueline Nelson, *Executive Assistant*

## Our simple, straightforward promise:

Charitable gifting through The Community Foundation Martin - St. Lucie reduces taxes, simplifies giving and ensures grants go to qualified nonprofits.



851 SE Monterey Commons Blvd. | Stuart, FL 34996 | 772.288.3795 | **TCFMSL.org**

