

ANNUAL REPORT
2021
2022

THE COMMUNITY
FOUNDATION
MARTIN | ST. LUCIE

Delivering on our promise.



Elizabeth A. Barbella
President & CEO



As The Community Foundation celebrates its 35th year, we are fully embracing our role as a leader in philanthropy here on the Treasure Coast.

The Foundation was created to help donors support the causes they believe in, while keeping philanthropic dollars working in our community. We are delivering on that promise.

This year, we've stewarded a record \$4.75 million in philanthropic dollars, with 80% of that total invested right here at home. Our scholarship awards of over \$750,000 have been our largest to date.

We have also extended The Foundation's reach beyond our core commitment to effectively connect clients with charities. This report explores how we are working to ensure that our donors' philanthropic investments achieve maximum impact through innovative programs such as funding consortiums, community conversations, and strategic business planning for nonprofit organizations.

In these ways and more, we are building on our simple, straightforward promise: to reduce the tax impact on your charitable dollars, simplify giving, and provide insight to ensure that your grantmaking is invested with qualified and effective nonprofits.

Reaching new heights.

2021-2022 Milestones:



Investing responsibly.



Linda Houston

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

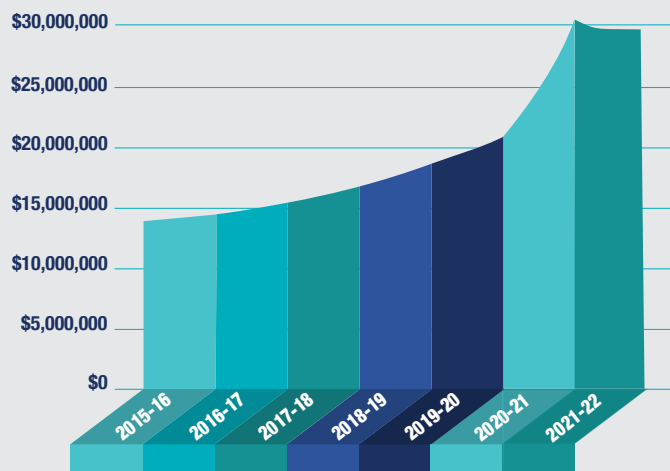
Our investment process begins with understanding you, your philanthropic goals, your risk tolerance, and your investment philosophy. That information allows our committee (comprised of prior and current investment professionals), along with our investment consultant, CAPTRUST, to select the asset allocation model and investment portfolio that best meet your fund's stated goals.

Our goal is first and foremost to protect and preserve your philanthropic investment. We monitor allocation models and investment performance on a quarterly basis to assure that funds are meeting their respective stated industry benchmarks, and make tactical adjustments based on individual manager performance and the overall market environment.

Our long-term disciplined investment process ensures that we achieve optimal portfolio performance while strategically positioning these investments for the future.

We are pleased that in 2022 - despite a challenging market - The Community Foundation's portfolios have met or exceeded their stated industry benchmarks for the year. This performance is emblematic of our trusted role as a fiduciary: to achieve the greatest gains possible while mitigating potential losses in a volatile market.

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 retain your personal wealth manager*
 - Anonymous giving options
- *Establishing gift restrictions apply.

Convening our community.



Ellyn Stevenson
Chair
Former Health Care Executive

Reflecting on the trajectory of The Community Foundation, I am proud of our growth and expansion over the past 35 years. From a small, largely unknown organization at our outset in 1988, we have emerged as a thought leader, able to provide an unbiased, umbrella view of critical needs and funding gaps in our communities. We have become a resource for “all things philanthropic” in Martin and St. Lucie Counties.

Today we are:

- **Organizing and leading funding consortiums**, where we bring together individual donors and funding organizations to rapidly funnel support where it is urgently needed.
- **Convening community leaders** to address emerging challenges, such as basic human needs (food, clothing, shelter, access to medical care) and veteran’s services.
- **Helping local nonprofit organizations excel** by adopting proven best practices.

My passion for The Foundation’s work has always been about how we can best assist our fundholders, our area’s nonprofits and those they serve, and our community as a whole. I am invigorated by the multi-faceted role we now play, and look forward to The Foundation’s future as your philanthropic partner.

Nurturing nonprofits.

In partnership with the Children’s Services Council of St. Lucie County, The Community Foundation is underwriting consulting expertise for qualified nonprofit organizations, to help them more effectively serve their constituents and build for the future.

The pilot program includes embedded guidance within select organizations, coaching for board members and operations teams, and master classes in leadership for current and emerging nonprofit administrators.

Nonprofit Impact:



“These programs provide a new business-oriented perspective and a way for leadership to evolve. Passion for a cause, though important, needs to be combined with metrics for an organization to be efficient, responsive, and focused.”

- CEO Participant

In the past fiscal year, The Community Foundation Martin-St. Lucie has facilitated donor funding totaling \$4.75 million throughout a variety of sectors.



\$4.75 Million

IN GRANTS AND
SCHOLARSHIPS
AWARDED

Animal Welfare- \$55,029

Arts and Culture- \$256,050

Nonprofit Support- \$179,120

Education & Literacy- \$329,260

Environment- \$195,114

Faith-Based- \$353,515

Health & Wellness- \$925,650

Human Services- \$1,682,415

Research & Advocacy- \$23,230

Scholarships*- \$750,617

**The Community Foundation Martin-St. Lucie has facilitated \$520,474 in scholarships in partnership with the [Nina Haven Foundation](#), [Sailfish Point Foundation](#) and [Rodney M. Gould Foundation](#). The collective impact of our collaboration with these external scholarship entities is incorporated into the total value of grants and scholarships awarded in 2021-2022.*

THE COMMUNITY FOUNDATION MARTIN-ST. LUCIE

impacts communities through inspired philanthropy, strategic innovation and leadership.

Board of Directors

Ellyn Stevenson, Chair

Theora “Bunny” Webb, Vice Chair

Nancy Crowder-McCoy, Treasurer

Brian E. Foss, Secretary

Kenneth A. Norman, Immediate Past Chair

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John E. Tranter

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Emeritus Board

Lester Combs (*deceased*)

Evans Crary, Jr.

Mike Crook

Jack Forde

Bill Fowler

Floyd “Bud” Jordan, Founder (*deceased*)

Tom Weber

The Community Foundation Staff

Elizabeth Barbella, President & CEO

Courtney Brown, Program Associate

Ellen Gundrania, Manager of Programs

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.



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Platinum
Transparency
2022
Candid.