

ANNUAL REPORT

2022  
2023

*Inspiring Philanthropy*  
**THE COMMUNITY  
FOUNDATION**  
MARTIN | ST. LUCIE

# The Community's *Choice*

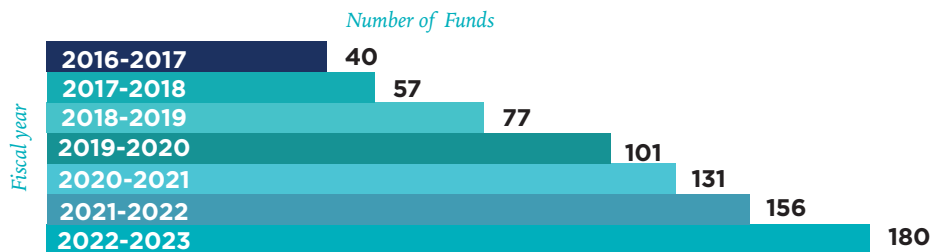


**Elizabeth A. Barbella**  
President & CEO



In 1988 our founding fathers gathered around a table, locked elbows, and launched The Community Foundation. They understood the importance of creating an organization that could work with current and future generations to ensure that charitable dollars were strategically invested right here at home. They also understood the awesome responsibility of working with individuals, families and local businesses to grow those same charitable dollars tax free, for maximum impact today and tomorrow.

Thirty-five years later, The Foundation continues to care and tend Funds established nearly three decades ago, while regularly welcoming new donors - our Fundholders - to our Fund family.



We are honored to have become the trusted philanthropic partner for so many who call the Treasure Coast their home. In choosing to give through The Community Foundation, our Fundholders are reaping the benefits of working with a team of professionals dedicated to helping them realize their charitable goals during and after their lifetimes. The Foundation's promise is to ensure that every gift is given with confidence, knowing that it will have the impact that our Fundholders intended.

Our Fundholders' trust has resulted in record growth in our asset base - representing a 46% increase in philanthropic dollars under management. As our asset base has grown, so has the total amount of charitable dollars given in partnership with our Fundholders. 2022-2023 was a remarkable year for The Foundation, with \$3.41 million in grants and scholarships awarded. Being great champions of giving where you live, we are pleased to share that over 81% of the dollars given remained local.

We look forward to another year of prosperity and good giving. We stand ready to help donors make strategic, well-informed choices that will enable them to reach their philanthropic goals today and plan confidently for the future.

## Working Together for the *Greater Good*

### 2022-2023 Milestones:



# Protecting Your *Investments*

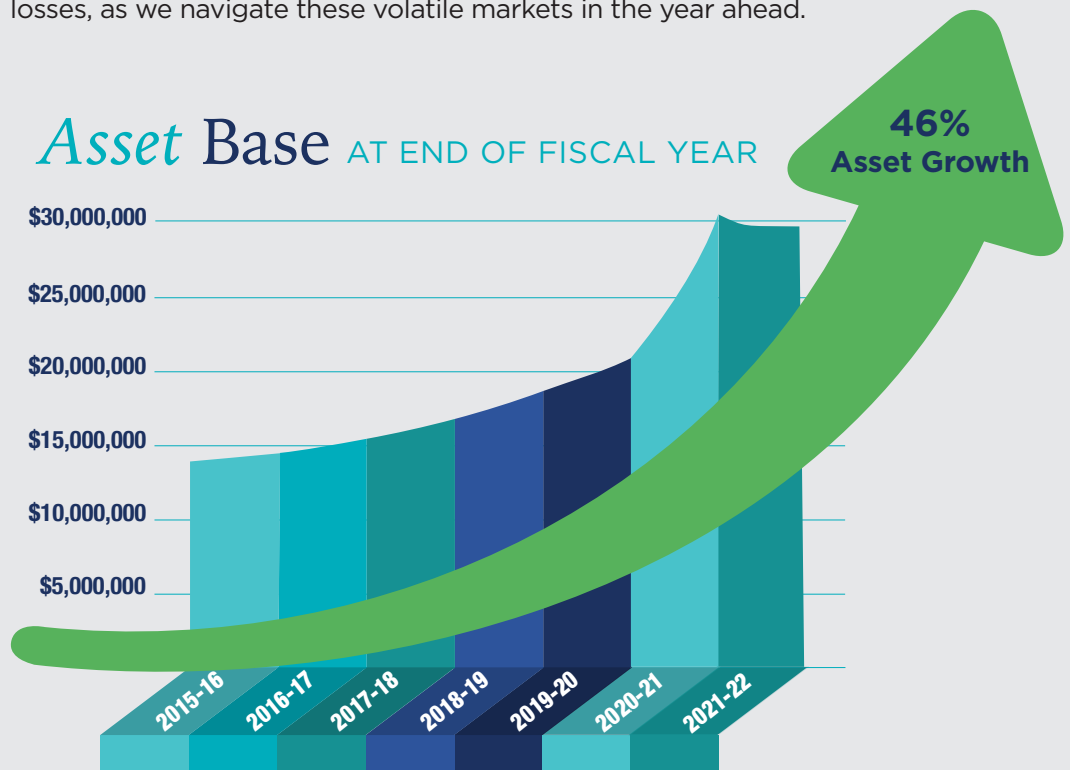


**Linda Houston**

Investment Committee Chair  
for Fiscal Year 2022-2023  
*Former Executive and Wealth  
Advisor, Merrill Lynch*

Our goal as an Investment Committee is to protect and preserve your philanthropic assets. Our committee is comprised of current and former investment professionals, along with our consultant, CAPTRUST. Together we monitor asset allocation and performance on a quarterly basis. We make tactical adjustments as needed, based on the market environment and individual manager performance, to ensure that your funds meet the stated industry benchmarks.

While 2023 remains a volatile and challenging market, we are pleased that your funds continue to track their stated market benchmarks for the year. This performance is the result of our long-term investment philosophy of striving for optimal performance, while preserving and protecting your philanthropic investments. We continue as a fiduciary committee to monitor and track all portfolios to achieve the greatest gains possible while mitigating potential losses, as we navigate these volatile markets in the year ahead.



## Building the Bench Strength of the *Charitable Sector*

The Community Foundation’s innovative Capacity Building Program, which launched in 2020 in partnership with the Children’s Services Council of St. Lucie County and Spot On Strategies, LLC, is empowering area nonprofits to effectively meet the growing needs of their constituencies.

In the past fiscal year, 115 nonprofit executive team members and managers from 43 local organizations attended Master Classes, receiving intensive training in over 30 proven best practices leadership skills and tools. This program exemplifies how The Community Foundation is building the service delivery system’s capacity by investing in well-trained, world-class leaders.

“All of the tools that we’ve been given . . . it’s like getting an MBA in five weeks.”

*Nonprofit CEO - Master Class Tier 2 Graduate*

# Offering A Clear *Advantage*



**Ellyn Stevenson**  
Chair  
Former Health Care Executive

Why are those who are passionate about giving increasingly choosing The Community Foundation Martin-St. Lucie as their philanthropic partner? The answer is simple: They trust us to ensure that their charitable dollars are wisely invested, achieve maximum impact and inspire others to give. They also know that channeling their donations through a Fund at The Community Foundation offers distinct tax and other financial advantages over other private giving and foundation options.

As a long-time Foundation board member and one of the earliest Fundholders, I am proud of the growth and evolution of The Foundation and the value-added benefits we offer.

We are committed to simplifying giving, offering the deepest tax advantages permissible by law, and ensuring that our Fundholders are supporting qualified nonprofits. Establishing a Fund at The Foundation allows the donor to enjoy the benefits of working with a professional team of charitable giving experts, while being actively involved in directing how their charitable dollars are gifted.

The Community Foundation offers a suite of concierge services that result in individualized and unique solutions that empower our Fundholders to optimize their charitable giving. Our personalized guidance, in-depth knowledge of the charitable landscape, research and follow-up reporting services give our Fundholders confidence that their gifts are being exceptionally stewarded to ensure they are doing the most good.

Whether we are mobilizing an individual grant or bringing together like-minded donors to pool their charitable dollars for greater impact, The Foundation's thoughtful and strategic approach to giving is reshaping the way that local philanthropy gets done.

## Value-Added Benefits:



\*Establishing gift restrictions apply.

In the past fiscal year, The Community Foundation Martin-St. Lucie worked with its Fundholders to issue grants and scholarships totaling \$3.41 million.



## \$3.41 Million

### IN GRANTS AND SCHOLARSHIPS AWARDED

Animal Welfare- \$44,646

Arts and Culture- \$562,130

Nonprofit Support- \$224,070

Education & Literacy- \$116,772

Environment- \$97,700

Faith-Based- \$28,918

Health & Wellness- \$599,112

Human Services- \$1,076,890

Research & Advocacy- \$11,371

Scholarships\*- \$647,836

*\*The Community Foundation Martin-St. Lucie has facilitated \$467,851 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 2022-2023.*

# 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

## Board Members

Kelly A. Buist  
John Doody  
Linda Houston  
Michael A. Kelly  
Thomas Lytle  
John E. Tranter  
Gytha Von Aldenbruck

## External Committee Members

Jules Andrew  
Kate Freihofer  
Steven Rivera

## 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.

THE  
COMMUNITY  
FOUNDATION  
*Inspiring Philanthropy*

MARTIN  
ST. LUCIE

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