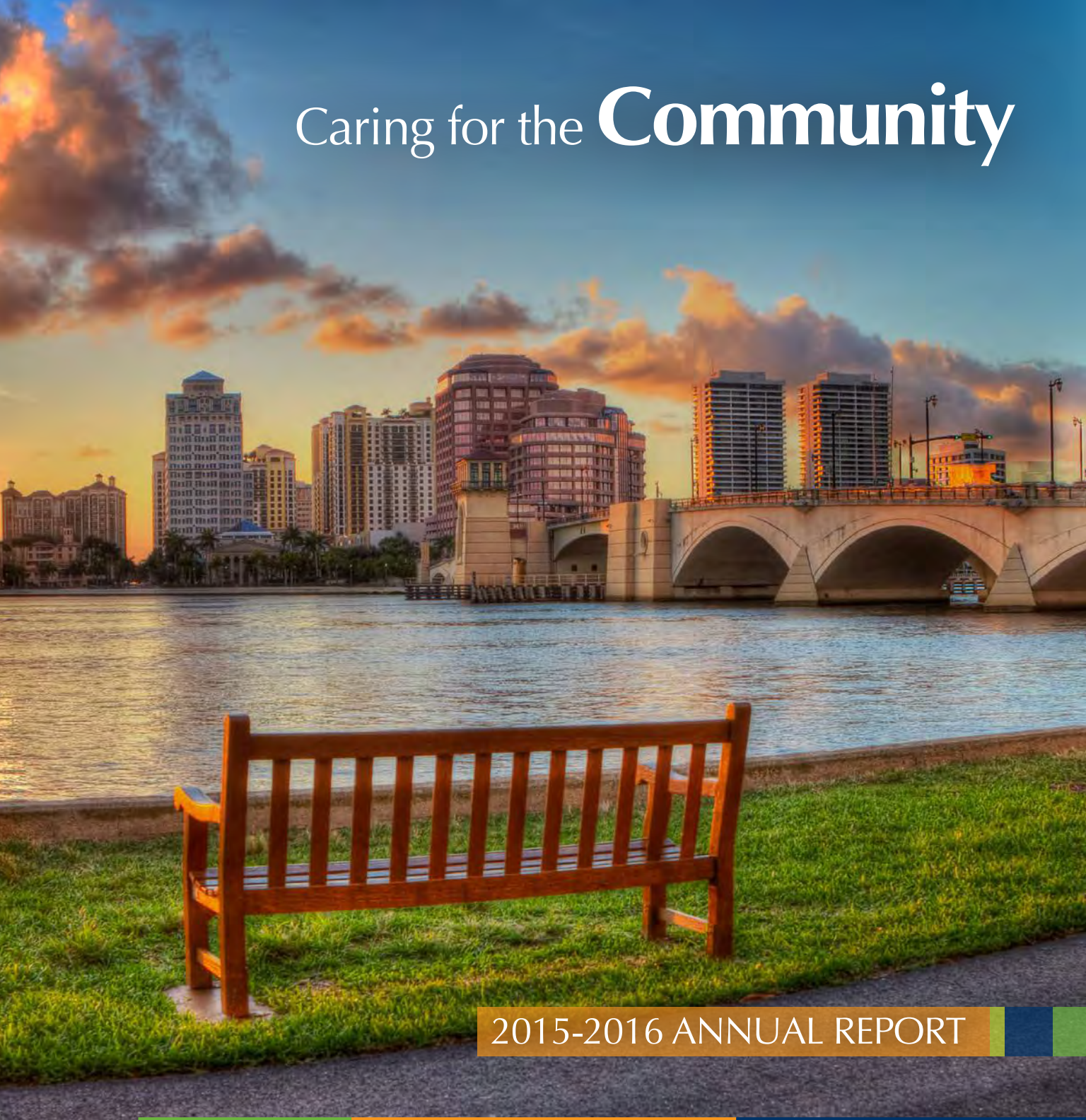


# Caring for the Community



2015-2016 ANNUAL REPORT



**COMMUNITY FOUNDATION**  
for Palm Beach and Martin Counties

Your Philanthropy  
Our Community  
Better Together

## A Worldwide Effort Of Change

First Community  
Foundation Founded:

**1914**

**780**

Community Foundations  
in United States

Distributed

**\$5.2 BILLION**

Last Year to Community Needs

**1,838**

Community  
Foundations Worldwide in

**69 DIFFERENT  
COUNTRIES**

More than

**\$73 BILLION**

in Assets

## Your Community Foundation At A Glance

Founded in:

**1972**

Total Assets:

**\$154 MILLION**

Total Gifts Received:

**1,627**

Cumulative Grants Since Inception:

**\$128 MILLION**

Serving:

**1,523,263**

people in two counties

Total Grants Awarded:

**\$8.94 MILLION**

Total Number of Funds:

**OVER 300**

and growing!

Full Time Staff

**15**



# Letter from the **PRESIDENT**



Dear Friends,

**What do you care about?** Charitable interests are as wide and varied as the world we live in. Whether you want to feed the hungry, educate children, protect our environment, nourish the arts, or revitalize neighborhoods, philanthropy is a unique, determined spirit to better the lives of others. It is inside each of us.

Our Legacy Society members care about the future. This year, our Legacy Society grew to 147 members through bequests, endowed funds and other planned gifts for the benefit of the community – both now and in the future.

Our donors care about those in need. Your generous gifts and the bequests received last year enabled us to award millions. New charitable funds were created by generous individuals, families and businesses – and each fund represents their diverse charitable interests.

Our exceptional Board of Directors care about this region, and we are grateful for their extraordinary leadership. The accomplishments of our Foundation reflect the efforts of our volunteers, professional advisors and dedicated staff.

Speaking of our caring staff, Vice President for Personal and Family Philanthropy Danielle Cameron retires after serving with distinction for 30 years. We salute and thank her for her exemplary service.

Thank you to the entire community for your support this year. Every day, we make grants on our donors' behalf and invest our time, talent and treasure into our community. We remain committed to honoring each donor's intent, and to working in partnership with others to weave together a better future for all of us. Contact me anytime at (561) 340-4502 or [bhurlburt@cfpbmc.org](mailto:bhurlburt@cfpbmc.org).

A handwritten signature in black ink, appearing to read 'Bradley Hurlburt', written in a fluid, cursive style.

Bradley Hurlburt  
President & CEO



## Mission Statement

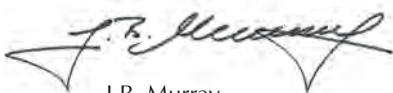
To facilitate informed philanthropy and together, with our donors, serve as the catalyst for building vibrant communities.

- We work with passionate philanthropists to make their charitable giving effective and rewarding.
- We engage in community building to meet our community's critical needs.
- We foster collaborative relationships and facilitate conversations to address emerging challenges.
- We build endowment for the benefit of the community – forever.
- We preserve donor intent, and are bound to uphold the donor's original intent.

## Note from the **CHAIRMAN**

The Board of Directors and I greatly appreciate the generous support our donors have provided throughout the years in sharing their legacy with our community. We remain grateful for the trust placed in the Community Foundation. We will continue to help our community effectively and meaningfully direct its resources generously toward others with the highest degree of integrity.

Thank you for sharing in this legacy of philanthropy.



J.B. Murray  
Chairman of the Board



## Board of Directors

*Sherry S. Barrat  
Anson M. Beard, Jr.  
Susan P. Brockway\*  
Lore Moran Dodge  
George T. Elmore  
Kathleen B. Emmett  
Dr. Dennis P. Gallon  
Dennis S. Hudson III\*  
Bradley A. Hurlburt  
Kathleen J. Kroll  
Andrew Kushner  
Christina M. Macfarland  
Elizabeth 'Libby' Marshall  
Peter Matwiczyn  
Lawrence Miller  
Jane M. Mitchell\*  
Lisa M. Morgan  
J.B. Murray  
Virginia H. Smith  
Caroline B. Sory  
Susan S. Stautberg  
Douglas A. Stockham  
Christopher W. Storkerson  
Steven A. Templeton  
Roy J. Zuckerberg*

*\*new as of July 1, 2016*



### National Standards

The Community Foundation meets National Standards for operational quality, donor service and accountability in our sector. This certification assures the utmost in transparency, donor accountability, fundraising, grantmaking and financial practices.

Administered by the Council on Foundations, National Standards guide community foundations in establishing legal, ethical and effective operational practices that serve as blueprints for internal development and benchmarks for external assessment.



### Council on Foundations

Community Foundation for Palm Beach and Martin Counties is an active member of the Council on Foundations, an association of more than 2100 grantmaking organizations and corporations



### Florida Philanthropic Network

We participate with the Florida Philanthropic Network, a statewide association of grantmakers working to strengthen philanthropy through research, education and public policy.

# What Do You Care About?



## Elizabeth and Marion Muller care about the visually impaired.

Elizabeth and Marion Muller\* inherited their family foundation set up by their loving parents, Emily and Patrick. These siblings decided to transfer the family foundation assets to the Community Foundation for simpler grantmaking. They set up donor advised funds to benefit their charitable passions including special education for the visually impaired.

Donors who have an existing private foundation may be interested in the benefits of transferring it to the Community Foundation. Through a simple transfer process, donors may be able to avoid some of the hassles and costs of private foundation management.

There are two options to consider - donor-advised and other fund options and the supporting organization option. Each approach allows donors to remain involved in grant making if that is their desire. At the same time they will be able to ensure that their intent, name and pattern of charitable giving are maintained in perpetuity.

*\*Names have been changed.*





## Hans and Mary cared about women and children.

Hans and Mary Stratmann cared about our local women and children, especially families struggling with homelessness. They left a bequest in their will to help women get the help they need. They trusted the Community Foundation. And we make sure their passions live on.

An excellent way to support Community Foundation for Palm Beach and Martin Counties' mission is to leave us a bequest in your will, living trust or with a codicil. Making a gift by bequest like the Stratmanns allows you to continue to use the property you will leave to charity during your life and enables you to leave a lasting legacy.

A bequest is generally a revocable gift, which means it can be changed or modified at any time. Donors can choose to designate that a bequest be used for a general or specific purpose so you have the peace of mind knowing that your gift will be used as intended. Bequests are exempt from federal estate taxes. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes, resulting in a larger inheritance for your heirs.

# OUR FUNDS

## 29 New funds this year

- Altobello Family Donor Advised Fund
- The Arts Council of Martin County Endowment Fund
- The Bohnett Family Fund
- Center for Creative Education Endowment Fund
- Sally and Don Chester Family Fund
- The Davis Family Fund
- Charles K. and Lena P. Davis Donor Advised Fund
- The Emmett Fund
- Festival Legacy Circle Fund
- Marjorie S. Fisher Fund
- Gala Giving Circle
- Historical Society of Martin County
- Hope for the Future Fund
- The Lisa L. Huertas Family Fund
- Impact 100 Men Palm Beach County
- Impact The Palm Beaches
- Joan and David Sherman Fund
- Jupiter Inlet Lighthouse Endowment Fund
- Loggerhead Marinelife Center Endowment Fund
- John and Nancy Marshall Everglades Educational Fund
- The Loy Anderson Miles Stone Foundation
- Oristano Scholar Fund
- Palm Beach Zoo Wildlife Conservation Endowment
- The Peterson Family Fund
- Dr. Ray Robinson Endowment Fund
- Sandoway Discovery Center Endowment Fund
- School of the Arts Foundation Fund
- Joan and David Sherman Fund
- Young Singers of the Palm Beaches Endowment Fund

## OUR FUNDS

- 211 Palm Beach Treasure Coast Endowment Fund
- Helen Harting Abell Fund
- Sheldon B. Ackerman Fund
- The Acorn Fund
- The Administrative Fund (Annual Support)
- Advisors for Philanthropic Impact Fund
- Albert and Marjorie Alfus Fund
- Dwight and Lyona Allison Fund for Administrative Endowment
- Lyona and Dwight Allison, Jr. Fund
- ALS Awareness and Education Fund
- Altobello Family Donor Advised Fund
- Inger and H. Loy Anderson Jr. Foundation
- The Loy Anderson Miles Stone Foundation
- The Arts Council of Martin County Endowment Fund
- John S. Atwater Memorial Scholarship Fund
- Matthew James Audin Memorial Scholarship Fund
- Henry and Mildred Baldwin Memorial Endowment Fund
- Bank of America Minority Student Scholarship Fund
- Barnett-Merrill Family Fund
- Laurence E. Barreca Fund
- Laurence E. Barreca Scholarship Fund
- Barrat Family Fund
- Edward T. Bedford Foundation Scholarship Fund
- William E. Benjamin, II Fund
- Maura and William Benjamin Scholarship
- William E. Benjamin, II Unrestricted Fund
- Bennett/Darwin Family Scholarship Fund
- Thomas William Bennett Memorial Scholarship Fund
- Big Dan's Big Give Fund
- John H. Birdsall Family Fund
- Lisa Bjork Memorial Scholarship
- George W. Blabon, III Endowed Fund
- Thomas H. Blash and Martha Blash Research Fund
- Walter & Adi Blum Scholarship Fund
- Helen and Bob Bodington Fund
- The Bohnett Family Fund





- Gina Auditore Boner Memorial Scholarship Fund
- Mary R. and William C. Bowden Fund
- Boys and Girls Clubs of Palm Beach County Great Futures Fund
- Harry and Bertha Bronstein Memorial
- Dr. William J. Bryant Family Fund
- Robert A. Butler Estate and Dr. Richard H. Butler Fund
- Mary Beth and Jack Callahan Fund
- Cardinals-Marlins Fund
- Perry-Belle and Phillip D. O'Connell Pioneer Fund
- Center for Creative Education Endowment Fund
- The Chairman's Fund
- Chapin/Kiefer Family Fund
- Sally and Don Chester Family Fund
- Allen C. Clark Memorial Scholarship Fund
- Irene Gibson Clay Scholarship Fund
- Frank and Marie Cleary Memorial Scholarship Fund
- Julian and Eunice S. Cohen Fund
- Julian and Eunice S. Cohen Scholarship Fund
- Coleman Family Fund
- Nicholas and Briggs Coleman Fund
- Bradley Collins Memorial Scholarship Fund
- Bradley and Carol Collins Fund
- Colonial Bank Scholarship Fund
- Community Impact Fund
- Community Scholarship Fund
- Community Garden Green Fund
- Mark W. Cook Fund
- Christopher N. Coppola Scholarship Fund
- Ingebord Crede Memorial Scholarship Fund
- The Rembert T. Cribb Family Fund
- Cuban Scholarship Fund
- Cummings Rafferty Family Fund
- Julie F. & Peter D. Cummings Fund
- The Joseph DaCorte Fund
- Don Dahlberg Memorial Scholarship Fund
- James & Judy Daleen Fund
- Terry Darby Memorial Scholarship Fund
- Elaine and Dave Darwin Fund
- Dr. Sidney Davidson Nursing Scholarship
- The Davis Family Fund
- James H. Davis Memorial Scholarship Fund
- Charles K. and Lena P. Davis Donor Advised Fund
- The de Peyster Family Fund
- Margo and Ashton de Peyster Fund
- Delray Beach Playhouse Ernest G. Simon Scholarship Fund
- Dominique Trust
- Don Donahue Fund
- The Willard D. Donnelley Endowment Fund
- Dreyfoos Fund
- The DuBois Fund
- Rebecca Walter Dunn Fund
- The Durkin Family Fund
- Early Childhood Education Fund
- Early Childhood Education Fund
- Early Learning Coalition of Palm Beach County Fund
- Dr. William and Nancy Earnhart Fund
- Easter Seals Palm Beach, Martin and St. Lucie Fund
- Ellen Beth Eddleman Memorial Scholarship Fund
- George and Wilma Elmore Fund
- The Emmett Fund
- The Environmental Fund
- Families First of Palm Beach County Foundation
- Ruth Lewis Farkas Fund
- H. David Faust Memorial Scholarship Fund
- Festival Legacy Circle Fund
- The Nettie Spiro Finkle Scholarship Fund
- First Bank and Trust of Indiantown Directors Memorial Scholarship Fund
- Marjorie S. Fisher Fund
- Flah Family Foundation for Childhood Trauma
- Flicker/Freudenberg Scholarship Fund
- Florida Council on Economic Education Fund
- Kathryn Fox Fund
- Ernest Frank Scholarship Fund Created in Memory of Arlene Fulton Hammond
- Frisbie Family Fund
- Funston Family Fund
- Gala Giving Circle
- Galadriel Peace Fund
- Galadriel Peace Fund II
- Gale Academic Leadership Endowment Fund
- Katherine and Richard Garlington Fund
- Fran Gay Memorial Scholarship Fund
- John Giba Youth Leadership Fund
- The Gingras Family Fund
- Gionfriddo Health Education Fund
- Giuffrida Family Fund
- Patrick J. and Jody H. Gleason Environmental Fund
- Scott R. Goering Legacy Fund
- Mary Jane Grant Fund
- Richard and Helen Grant Fund
- Grassy Waters Conservancy Fund
- The Gratitude Fund
- The Gubelmann Family Foundation Scholarship Fund
- Gurto Family Fund
- Jeffrey Gutin Fund
- Jane and Gene Guttman Fund
- Gene J. Guttman Fund
- Robert D. Handley Memorial Scholarship Fund
- Hardrives of Delray Fund
- J. Ira and Nicki Harris Fund
- Harrington Scholarship Fund for Martin County
- Rita Dee Hassenfeld Fund
- Andrew Hatfield Scholarship Fund
- Kathy Heming Scholarship Fund
- T.M. Henry Family Fund
- Heather and Patrick Henry Scholarship Fund
- The Heston Fund
- Historical Society of Martin County
- J. Peter Hoffman Memorial Scholarship Fund
- Hope for the Future Fund
- Phyllis Hopman Arts and Culture Fund
- Ray Howland Scholarship Fund
- The Lisa L. Huertas Family Fund
- The Hurlburt Family Fund
- Frank P. Husvar Memorial Scholarship Fund
- Impact 100 Palm Beach County
- Impact 100 Men Palm Beach County
- Impact The Palm Beaches

*Funds list continued on page 8*

# OUR FUNDS

*Funds list continued from page 7*

- The Jackson Family Foundation Fund
- Robert and Deborah Jacobson Scholarship Fund
- The Freddie Stebbins and James Julius Jefferson Family Fund
- Matthew Jensen Memorial Fund
- R. Bruce Jones Memorial Scholarship Fund established by the Sugar Cane Growers Corporations of Florida
- Jupiter Inlet Lighthouse Endowment Fund
- K2 KIDS
- Alfred and Elizabeth Kay Memorial Fund
- Thomas F. Kearney Memorial Scholarship Fund
- The Kirkwood Fund
- H. Kirsch Family Foundation Fund
- Dixie Kirsch Family Foundation Fund
- Ilse Klassen Fund
- Danny Knichel Memorial Scholarship Fund
- John S. and James L. Knight Foundation Fund
- Sunny and Bonnie Knickerbocker Fund
- Abby Gelles Knott Fund
- Robert P. Koch Memorial Scholarship Fund
- Ryan Kollmer Memorial Scholarship Fund
- Kraus-Jeveli Family Fund
- Laura E. and Wilbur J. Kupfrian Family Foundation Fund
- Devon Kurlander Memorial Fund
- Judy Lake Memorial Fund
- Landon Fund
- Joyce Lanier Milner Fund
- LCAN Fiscal Sponsorship
- Richard G. Lepeska Fund
- George and Arlene F. Lepeska Scholarship Fund
- Stefanie Liberti Memorial Scholarship Fund
- Marcelle Hull Littell
- Loblolly Scholarship Fund
- Loggerhead Marinelife Center Endowment Fund
- Lorenzini Family Fund
- Inez Peppers Lovett and Charlie Ellington Scholarship Fund
- LSP Educational Scholarship Fund
- Paul L. MacAnaney Memorial Scholarship Fund
- John D. and Catherine T. MacArthur Fund
- The Macfarland Philanthropic Fund
- MacGuire Family Fund
- Honorable Eva W. Mack, First Black Mayor of West Palm Beach Scholarship Fund
- Daniel J. Mahoney, Jr. Fund
- Mickey Mandelblatt Memorial Scholarship Fund
- Mariner Sands Chapel Fund
- John and Nancy Marshall Everglades Education Fund
- Marie Graber Martens Fund
- Philip Maslowe Orphanage/Educational Fund
- William Morrison Matthews Fund
- Michael Flagler Matthews Sports Education Fund
- Jordan Camino Evert McCracken Memorial Fund
- Michelle McGann Fund
- Thomas Ladue McGinty Memorial Environmental Fund
- Allan J. McIntosh Fund
- Esther Sheehy McShurley Scholarship Fund
- Alma Lu Meerdink Fund
- Nicholas Megrath Scholarship Fund
- Adele Wells Meyer Memorial Scholarship Fund
- Sydelle F. and Arthur I. Meyer Scholarship Fund
- Courtlandt and Gina Miller Scholarship Fund
- Matthew "Bump" Mitchell/Sun-Sentinel Scholarship Fund
- Helen Powers Monahan Fund
- Helen Powers Monahan Scholarship Fund
- Stella Monchick-West Hospice Educational Fund
- Mordes Family Foundation Fund
- The Morgan Family Fund
- Morris Family Fund
- Morse Hill Foundation Palm Beach Donor Advised Fund
- Jennifer Morton Fund
- Mosaic Fund
- Harding Mott, Sr./US Sugar Corp. Training for Excellence Fund
- Norman and Sarah Murphy Fund
- John T. Murray, M.D. Children's Health Fund
- The Murray Family Fund
- Jon M. Napierkowski Memorial Scholarship Fund
- Mabry M. Noxon Scholarship Fund
- Phillip D. O'Connell, Sr. Memorial Scholarship Fund
- Jacqueline O'Gorman Fund
- Olivia Foundation Fund
- Oristano Scholar Fund
- Nan Ourisman Fund
- Denise Lynne Padgett Scholarship Fund
- Palm Beach Chamber of Commerce Business Scholarship Fund
- Palm Beach Kennel Club Scholarship Fund
- Palm Beach Newspapers Scholarship Fund
- Palm Beach Zoo Wildlife Conservation Endowment
- The Paradise Fund
- Parmet Fund
- PBC Society of Plastic & Reconstructive Surgeons Scholarship Fund
- Stephen Madry Peck, Jr. Memorial Scholarship Fund
- Peggy Adams Animal Rescue League Endowment Fund
- The Peterson Family Fund
- Anna Marie Peterson Fund
- Mary and Robert Pew Public Education Fund
- Betty S. Price Fund
- The Nick Price Fund
- The Reuter Scholarship Fund
- Ritter Family Fund
- Dr. Ray Robinson Endowment Fund
- The Rodgers Family Foundation Fund
- Gwen Baker Rodgers Memorial Fund
- Marion Rossiter-Smith Fund
- Colonel Karl V. Price Lake Worth Community High School Air Force Jr. ROTC Scholarship Fund
- Sadler/Hull Donor Advised Fund
- Safety Net Fund
- Lawrence A. Sanders Fund to Promote Literacy
- Lawrence A. Sanders Scholarship Fund for Creative Writing



- Sandoway Discovery Center Endowment Fund
- Kim Love Sartory Scholarship Fund
- Theodore Satter Memorial Scholarship Fund
- Leah G. Schad Memorial Scholarship Fund
- Charles and Catherine Schmidt Fund
- School of the Arts Foundation Fund
- Schramm-Brown Fund
- Kyle Fredrik Schuemann Scholarship Fund
- Claire B. Schultz Memorial Scholarship Fund
- David C. Scott Fund
- David C. Scott Fund for ALS Research Fund
- Jo Ann and Edward Sears Endowed Fund
- Jo Ann and Edward Sears Fund
- Sharma Family Fund
- Pundit Mulchand and Janki Devi Sharma
- Peter Jay Sharp Foundation Scholarship Fund for Conservation Environment Studies
- Tara Sheridan Scholarship Fund
- Joan and David Sherman Fund
- Allan E. and Carol T. Shore Fund
- Myrna Abelman Siegel Scholarship Fund
- Mary B. Silk Memorial Fund
- Silver Family Fund
- Bickley F. and Russell G. Simpson Fund
- Dan Smith Dairy Scholarship Fund
- James R. and Gladys R. Smith Fund
- Eliot and Ruth Snider Fund
- Edward W. Snowdon and Lee Hill Snowdon Administrative Fund
- Beverly Sommer Scholarship Fund
- Lance Corporal Ryan J. Sorensen, USMC Liberty Scholarship Fund
- The Sorrel Ross Bollet Endowment Fund
- Squire, Sanders & Dempsey L.L.P. Administrative Endowment Fund
- St. Mary's Extended Education Fund
- Stautberg Family Fund
- Bailey Stein Fund
- James Stern Family Foundation Fund
- Robert Glen Stern Scholarship Fund
- Charles T. and Patricia Carry Stewart Fund
- Ann E. Stewart Memorial Scholarship Fund
- Stiller Family Foundation Fund
- Douglas Stockham Fund
- Richard and Lesley Stone Family Fund
- The Hans and Mary Stratmann Fund

- Susan R. & John W. Sullivan Fund for Martin County
- Sunburst Foundation Community Scholarship Fund
- Jack Taylor Fund for Abused and Neglected Children Fund
- Arthur C. Tilley Memorial Scholarship Fund
- Toppel Family Fund
- Ted Trimble Scholarship Fund for Vocational Training
- Trimble Scholarship for Martin County Fund
- Sue Twyford Memorial Fund
- Alexander and Mildred Valuzis Fund
- Wendy and Royall Victor III Fund for Environment and Landmark Preservation
- VSA Florida - Palm Beach County Fund
- The Walden Fund
- Herbert Weber Fund
- Roberta and Stephen R. Weiner Scholarship Fund

- Weinstein Family Fund
- Fred P. and Sophia D. Weissman
- The Weitz Company Scholarship Fund
- White Hat Charitable Fund
- Friends of the Gerald A. Williams, Esq. Academy
- Cliff Williams Youth Recreation Fund
- Williamson Pioneer Fund
- Ralph O. Wood Memorial Scholarship Fund
- Dave Yanis Scholarship Fund
- Robert Yates Charitable Fund
- Young Singers of the Palm Beach Endowment Fund
- Youth Music Fund for Conserving Classical Music Education Inspired by Alice Pyle Walker Maxey
- Joseph Zimmerman Charitable Foundation Fund
- R. J. Zuckerberg Palm Beach Fund



***“The Community Foundation is the lead philanthropic funder in Palm Beach and Martin Counties. Many organizations look to them for cues on issues important to funders. They help identify community needs and priorities, and are innovators in philanthropy. They are the thought leaders, and conveners. They are a quiet, consistent, persistent presence in our community and make a difference in the most understated way.”***

**– Rena Blades,  
President and CEO of the  
Cultural Council  
of Palm Beach County**



# ANNUAL Supporters

## \$100,000+

- Tsunami Foundation - Anson & Debra Beard, Jr.

## \$50,000 to \$99,999

- Community Foundation for Southeastern Michigan/Mrs. Marjorie Fisher
- R. J. Zuckerberg Palm Beach Fund

## \$25,000 to \$49,999

- Mr. and Mrs. Anson M. Beard Jr.
- Ilse Klassen Fund

## \$10,000 to \$24,999

- Lyona and Dwight L. Allison, Jr. Fund
- Mr. and Mrs. Thomas Barrat
- Nancy Brinker Charitable Foundation
- Elmore Family Foundation
- J. Ira and Nicki Harris Foundation
- Mr. and Mrs. Charles B. Johnson
- The Kessler Family Foundation
- Laura E. and Wilbur J. Kupfrian Fund

- Lottie French Lewis Fund
- Mr. and Mrs. Benjamin S. Macfarland II
- Marmot Foundation
- Martin County Community Foundation
- Mr. and Mrs. William M. Matthews
- Northern Trust
- PNC Wealth Management
- Lawrence A. Sanders Foundation
- Squire Patton Boggs
- Ms. Susan Stautberg
- Ms. Susan O. Taylor
- United Way of Palm Beach County

## \$5,000 to \$9,999

- John H. Birdsall Family Fund
- Briggs-Trimble Family Charitable Fund
- Mr. and Mrs. John C. Castronuovo
- The Chairman's Fund
- Mr. Kevin Clark
- Coleman Family Fund
- Julie F. & Peter D. Cummings Fund
- Cummings Rafferty Family Fund
- Ms. Lore Moran Dodge
- Wally Findlay Galleries
- Florida Crystals

- Florida Power and Light Company
- The Mary Alice Fortin Foundation
- The Hurlburt Family Fund
- Mr. Kenn Karakul and Mr. James Held
- The William and Phyllis Mack Family Foundation
- Mr. and Mrs. Peter Matwiczuk
- Ms. Jane Mitchell
- Ms. Charlotte Pelton
- Prime, Buchholz & Associates
- Mr. and Mrs. Michael Pucillo
- Mr. and Mrs. Todd Savage
- Schmidt Family Foundation
- Mr. and Mrs. Eliot Snider
- Templeton & Company
- Mr. Royall Victor III
- Roy Zuckerberg Family Foundation

## \$1,000 to \$4,999

- AIG Private Client Group
- Alzheimer's Community Care
- Andersen Tax
- Ms. Heather U. Baines and Mr. Lloyd Mc Adams
- Mr. and Mrs. Alfred R. Bell Jr.
- Boca Raton Regional Hospital Foundation
- The Borchardt Family Foundation
- The Breakers Palm Beach
- The Honorable Nancy G. Brinker
- Ms. Susan P. Brockway
- The Alice Busch Gronewaldt Foundation
- The Gilbert & Ildiko Butler Family Foundation
- Carney Family Charitable Foundation
- Celedinas Insurance Group
- Howard P. Colhoun Family Foundation
- Cornerstone Realty
- Elaine and Dave Darwin Fund
- Dreyfoos Group
- Mr. Robert B. Dunkin II
- Education Foundation of Palm Beach County
- Mr. George T. Elmore
- Ms. Kathleen B. Emmett CFRE
- Mr. and Mrs. Jose Pepe Fanjul Jr.
- The Fledgling Fund

- Florida Atlantic University Foundation
- Mr. and Mrs. Mark F. Freitas
- Mrs. Mary C. Funston
- Dennis P. Gallon Ph.D.
- Mrs. T. Richard Garlington Jr.
- Dr. and Mrs. Paul Gingras
- Mr. and Mrs. Peter W. Gonzalez
- Mr. and Mrs. Murray H. Goodman
- Gulfstream Goodwill Industries
- Gunster
- Hagan Family Fund
- Mr. and Mrs. Daniel A. Hanley
- Mr. Jim Haymes & Ms. Pam Whitton
- Mrs. Patrick Henry
- Holyfield & Thomas
- Mr. Richard Horowitz and Mrs. Diana Downs
- The Honorable and Mrs. Harry A. Johnston
- Mr. and Mrs. John P. Keller
- Raymond F. Kravis Center for the Performing Arts
- Mr. and Mrs. Andrew Kushner
- Mr. and Mrs. Peter E. Lacaille
- Mr. Matthew Lefkowitz
- Mr. and Mrs. Robb Maass
- Mrs. David J. Mahoney
- Mrs. Charlotte Mandelblatt
- Ms. Elizabeth 'Libby' Marshall
- Merrill Lynch
- Denise and William Meyer Foundation
- Mr. David S. Miller
- Mr. and Mrs. Lawrence J. Miller
- Mr. and Mrs. Scott W. Morgan
- Harding Mott Sr./US Sugar
- Stephen Murray and Muffie Bancroft
- Nova Southeastern University
- Mr. and Mrs. James F. Orr III
- Palm Beach State College Foundation
- Palm Healthcare Foundation
- Paws2help
- Mr. and Mrs. Todd F. Peter
- Pioneer Linens
- The William H. Pitt Foundation
- Max Planck Florida Institute for Neuroscience

The Community Foundation and our generous supporters are committed to improving life in Palm Beach and Martin Counties through effective philanthropy. This year that commitment translated into an \$8.94 million in grants and scholarships to local nonprofits and students. Every gift, regardless of the amount, is an investment to build stronger, healthier communities.



- Ms. Allison Ridder and Mr. Brady Johnstone
- The Rodgers Family Foundation Fund
- The Rodman Foundation
- E. Burke Ross, Jr. Charitable Foundation
- Scripps Florida
- Ms. Maureen Shenkman
- Mr. and Mrs. Bailey B. Sory
- Spirit of Giving Network
- Squire, Sanders & Dempsey
- Mr. Douglas A. Stockham
- Douglas Stockham Fund
- Mr. and Mrs. Mark Swillinger
- Watkins and Johnson Family Charitable
- Mr. and Mrs. Joseph A. Webster III
- Mr. and Mrs. G. Larry Wilson
- Mr. Darren Womer

## \$500 to \$999

- Ms. Eva Bodnar
- Bank of America Corp/US Trust
- Mr. Nevin P. Bauman
- Mr. William E. Benjamin IV
- Mr. and Mrs. Nathan Berry
- Mr. and Mrs. James B. Bertles
- Mr. and Mrs. Gregory Bonner
- Ms. Danielle Blangy Cameron
- Mr. and Mrs. Nicholas Coleman
- Cummings & Lockwood LLC
- David B. Dickenson, Esq.
- Ms. Jennifer Eaton
- Mr. Brian Edwards
- Farmer & Irwin Corp
- First Republic Bank
- Ms. Audrey Goldman
- Mr. and Mrs. Benjamin H. Gordon
- Mr. and Mrs. Alexander H. Griswold
- Mr. Richard D. Grow Jr.
- Mr. and Mrs. Richard D. Grow Jr.
- Hedrick Brothers Construction Co
- Ms. Heather Henry
- Ms. Suzanne Holmes CFP
- Mr. Phillip T. Kraft
- The Honorable Kathleen Kroll
- Mr. and Mrs. Robert P. Leidy Jr.
- Ms. Nancy P. Maio
- Ms. Maria Mamlouk

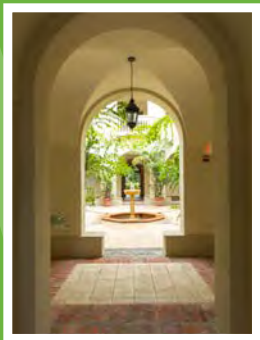
- Mr. and Mrs. James Marcus
- Mr. and Mrs. Alexander W. Matthews
- Mr. and Mrs. Sean D. Miller
- Mr. and Mrs. W. K. Mooney
- J. P. Morgan
- Mr. David G. Ober
- Mr. and Mrs. Michael Ramos
- Mr. and Mrs. Brian Ray
- Ms. Tandy Robinson
- Mr. and Mrs. Joseph Sambuco
- James and Ashley Sharpe
- Mrs. Virginia Smith
- Ms. Maura Smith
- Mrs. Charles T. Stewart
- Mr. and Mrs. Robert P. Stiller
- Mr. and Reverend E. Rodman Titcomb Jr.
- Mr. and Mrs. Winston D. Wren

## \$100 to \$499

- Aid to Victims of Domestic Abuse
- Alpert Jewish Family & Children's Services
- American Red Cross - Greater Palm Beach
- The ARC of Palm Beach County
- The ARC of Martin County
- Leta Austin Foster & Associates
- Ballentine Partners
- Mr. James A. Ballerano, Jr.
- Ms. Bridget Baratta
- Veronica R.S. Bauer Esq.
- Best Foot Forward Foundation
- Bethesda Hospital Foundation
- Big Brothers Big Sisters of Palm Beach
- Boca Raton Historical Society
- Mr. and Mrs. John Bollero Jr.
- Mr. and Mrs. Perry Borman
- Boys & Girls Clubs of Palm Beach County
- Braille Club of Palm Beach County
- Mr. and Mrs. Gregory Burdick
- CareerSource Palm Beach County
- Center for Creative Education/Learning
- Ms. Kim Champion
- Children's Case Management Organization
- Cultural Council of Palm Beach County
- Delray Students First
- Ms. Susan C. Diener
- DonorCommunity
- Ms. Susan T. Duane
- Mrs. Elizabeth H. Dudley
- Mr. and Mrs. Philip L. Dunmire
- Ellison Consulting Group
- Mr. James S. Ely III
- The Everglades Foundation
- Florida Atlantic University Foundation
- Florida Fishing Academy
- Friends of Foster Children of Palm Beach
- Friends of MacArthur Beach State Park
- Florence Fuller Child Development Center
- Ms. Kimberly Goodyear
- Benjamin and Elizabeth Gordon Charitable Foundation
- Ms. Michele L. Gurto CPA
- Habitat for Humanity of Martin County
- Habitat for Humanity of Palm Beach County
- Habitat for Humanity of South Palm Beach County
- Hanley Center Foundation
- Holy Ground Shelter for the Homeless
- HomeSafe
- Hospice of Palm Beach County Foundation
- The Lisa L. Huertas Family Fund
- The Ibarola Family
- Mr. Theodore Iorio
- Junior Achievement of the Palm Beaches
- Ms. Vicki Katz
- Ms. Ellen Kavanaugh
- Ms. Megan Keenan
- Mr. and Mrs. Thomas A. Kelly
- KidSafe Foundation
- Ms. Stefani Kochanski
- Mr. Patrick C. Koenig Jr.
- Ms. Cynthia A. Krebsbach
- Legal Aid Society of Palm Beach County
- Mr. and Mrs. Alan S. Levine
- Mr. James Long
- Ms. Christina Macfarland
- Maltz Jupiter Theatre

- Ms. Elizabeth Matthews and Mr. Charles James
- Ms. Debra M. McCloskey
- Mr. S. Bruce McDonald
- Ms. Katherine G. Metzger
- Mr. Philip Michael
- Mr. Jeremy Morse
- Mounts Botanical Garden
- Ms. Lisa N. Mulhall
- Ms. Vianne Nichols
- Nonprofits First
- The Palm Beach Symphony Society
- Palm Beach Opera
- Mr. and Mrs. Ellis J. Parker
- Ms. Ellen Peitz
- Ms. Thais D. Piotrowski CFP,CRPC
- Mr. Beau R. Raich
- Ms. Gloria Ortega Rex
- Mrs. Kent Rhodes
- Riviera Beach Community Redevelopment
- Mr. and Mrs. Stanley M. Rumbough, Jr.
- Schoolyard Films
- Mr. and Mrs. Brian Smith
- Mrs. Caroline B. Sory
- South Florida Science Center & Aquarium
- Spady Cultural Heritage Museum
- Mr. and Mrs. John P. Steinle
- Ms. Julie Peyton Stein
- Samantha Fairchild Storkerson Fund at New York Community Trust
- Sure2Echo
- Ms. Karen B. Sweetapple
- Ms. Marilyn L. Swillinger
- Ms. Merle J. Tausig
- The Center for Child Counseling
- The EW Foundation
- Treasure Coast Food Bank
- Tri-County Animal Rescue
- Trustbridge
- United Way of Martin County
- Urban Youth Impact
- The Volen Center
- Mr. Jonathan Wemette
- Mr. and Mrs. Austin Willis
- Ms. Maureen A. Wilt
- Mrs. Beverly White Yeager
- Young Singers of the Palm Beaches

# The LEGACY SOCIETY



The Legacy Society recognizes individuals and couples who have made provisions in their estate plans to provide a gift to The Community Foundation for the benefit of their community or our endowed fundholders at the Foundation.

These gifts take the form of bequests by naming The Community Foundation not only in a will or trust, but also in a charitable remainder trust, gifts of life insurance, or any other type of charitable planned gift.



*Frank Irby, Susanne Clemons, G. Sam Smith*

## LEGACY SOCIETY MEMBERS

Mr. Sheldon B. Ackerman  
Mr. Francis Xavier F. Altobello Jr.  
Mr. and Mrs. Henry Baldwin  
Mr. and Mrs. Thomas Barrat  
Mr. Laurence E. Barreca  
Mr. Anson M. Beard, Jr.  
Mr. and Mrs. William E. Benjamin, II  
Mr. and Mrs. Stig Bjork  
Mr. and Mrs. Thomas H. Blash  
Mr. Robert Bodington  
Mr. William H. Bohnett  
Estate of Sorrel Ross Bollet  
Mr. Milton J. Boone  
Michael S. Buckner, Esq.  
Harry and Bertha Bronstein  
Mr. Robert and Dr. Richard Butler  
Dr. and Mrs. William J. Bryant  
Michael S. Buckner Esq.  
Ms. Danielle Blangy Cameron  
Ms. Barbara Bishop Chapin  
Mr. and Mrs. Julian S. Cohen  
Mrs. Gwendolyn M. Cohen  
Mrs. Bradley Collins  
Mrs. Joseph DaCorte  
Mr. and Mrs. Donald Dahlberg  
Mr. and Mrs. James Daleen  
Mr. and Mrs. Dave Darwin  
Mr. James H. Davis  
Mr. and Mrs. John B. Dodge  
Ms. Margaret C. Donnelley  
Mrs. Elizabeth H. Dudley  
Mr. Alexander W. Dreyfoos, Jr.  
Ms. Carol DuBois  
Dr. and Mrs. William Earnhart  
Dr. and Mrs. Robert W. Eddleman  
Ms. Mary D. Fisher  
Ms. Kathryn Fox  
Mr. Ernest Frank  
Ms. Diane M. Freaney CPA



Mr. and Mrs. Barry H. Goldman  
 Ms. Mary Jane Grant  
 Mr. and Mrs. Richard Grant  
 Mr. and Mrs. Kenneth L. Groves  
 Ms. Michele L. Gurto  
 Mr. and Mrs. Gene J. Guttman  
 Estate of Jane S. Handley  
 Dr. and Mrs. Vernon A. Harrington  
 Mr. and Mrs. Patrick Henry  
 Thornton M. Henry, Esq.  
 Estate of J. Peter Hoffman  
 Ms. Phyllis Hopman  
 Mr. and Mrs. Bradley A. Hurlburt  
 Mr. and Mrs. Alfred Kay  
 Mr. William F. Koch, Jr.  
 Mr. and Mrs. William Kollmer  
 Mr. Russell Kraus and Mrs. Elaine Jeveli  
 Mr. and Mrs. Wilbur J. Kupfrian  
 Mr. and Mrs. James Kirkwood  
 Estate of Ilse Klassen  
 Ms. Abby Gelles Knott

Mr. Richard G. Lepeska  
 Ms. Marcelle Hull Littel  
 Ms. Lottie French Lewis  
 Brenda M. Magee, Ed.D.  
 Mr. Daniel J. Mahoney, Jr.  
 Ms. Marie Graber Martens  
 Col. and Mrs. John A. Marshall  
 Ms. Maria Mamlouk  
 Estate of Esther C. McShurley  
 Ms. Connie McEvoy  
 Mrs. Arthur I. Meyer  
 Mr. C. Charles Marran  
 Estate of Thomas Ladue McGinty  
 Estate of Alma Lu Meerdink  
 Ms. Joyce Lanier Milner  
 Estate of Mabry M. Noxon  
 Mr. David G. Ober  
 Mr. Donald M. Paterson  
 Dr. Dorothy Adams Peck  
 Ms. Anna Marie Peterson  
 Ms. Betty S. Price

The Hon. Edward Rodgers  
 Mr. Leon M. Rubin  
 Mr. and Mrs. Frederick Runkel  
 Ms. Lisa D. Russo  
 Mr. and Mrs. Charles Schmidt  
 Mrs. George F. Schrafft  
 Estate of Claire B. Schultz  
 Ms. Joan Sherman  
 Allan E. Shore  
 Mr. and Mrs. James R. Smith  
 Mr. and Mrs. Eliot Snider  
 Mr. Edward W. Snowdon  
 Mr. and Mrs. Charles T. Stewart  
 Mrs. Florence Trefry  
 Mr. Alexander Valuzis  
 Mr. Herbert Weber  
 Mr. Fred P. Weissman  
 Joseph Zimmerman Charitable Foundation

*Anonymous (15)*



*Kathryn Fox Winokur, Vicky Denton*



*Marianne and William Kollmer*

# Caring for Our **NONPROFITS**

## Forever Arts & Culture Endowment Challenge

The Community Foundation for Palm Beach and Martin Counties provided \$250,000 in grants from the John T. and Catherine T. MacArthur Fund at the Community Foundation for the Forever Arts and Culture Endowment Challenge. Each organization received a dollar for dollar matching grant of \$25,000 to establish a permanent endowment at the Community Foundation.

### Winners included:

- Center for Creative Education
- Centre for the Arts at Mizner Park
- Elliott Museum/Historical Society of Martin County
- Loggerhead Marinelife Center
- Loxahatchee River Historical Society
- Palm Beach Symphony Society
- Sandoway House Nature Center
- The Arts Council
- Young Singers of the Palm Beaches
- Zoological Society of the Palm Beaches



**Front Row L to R:** Hulya Selcuk, Palm Beach Symphony; Jamie Stuve, Jupiter Inlet Lighthouse Museum; Jennifer Esler, The Elliott Museum; Nancy Turrell, The Arts Council, Martin County; Joanna Marie Kaye, Festival of the Arts BOCA; Kathleen Breland, Palm Beach Zoo

**Back Row L to R:** D. Shawn Berry, Young Singers of the Palm Beaches; Kevin Smith, Palm Beach Symphony; Laura Daniel, The Arts Council, Martin County; Danica Sanborn, Sandoway House Nature Center; Bob Hamon, Center for Creative Education

**Photo Credit:** Tracey Benson Photography



In fiscal year 2016-2017, the Community Foundation will encourage up to fourteen 501(c)(3) organizations in Palm Beach and Martin Counties to establish a permanent endowment with the Community Foundation. The Community Foundation will invest \$350,000 into this initiative from the John D. and Catherine T. MacArthur Fund, matching up to \$25,000 per organization.





## Centenarian Donor Victor Oristano turns 100



## The John D. and Catherine T. MacArthur Fund

**Committed to building a more just, verdant and peaceful world.**

John Donald and Catherine Teresa MacArthur were quiet philanthropists in their lifetime, giving primarily to organizations in cities where they lived: Chicago and Palm Beach.

When John died of cancer on January 6, 1978, he was one of the three wealthiest men in America. The MacArthur Foundation assumed his assets, estimated at \$1 billion.

In 2004, The MacArthur Foundation entrusted the Community Foundation through the establishment of a \$20 million endowment, the John D. and Catherine T. MacArthur Fund at the Community Foundation. The endowment was created to address needs in the areas of arts and culture, education, the environment, and community revitalization.

Since 2005, 123 grants have been awarded for a total of \$7.2 million.

The MacArthur Foundation has also awarded an additional \$5 million to the Community Foundation for our affordable housing initiative, bringing the total investment in the Community Foundation over the years to more than \$27 million.

For the Oristanos, philanthropy is a family tradition. For more than fifty years, his children watched as he donated to causes he cared about and became active on the boards of various nonprofit organizations.

In 1996, Victor and his wife Jane relocated to sunny south Florida. In 2015, they established the Oristano Scholar Fund at the Community Foundation for Palm Beach and Martin Counties, the successor to the Oristano Foundation. This year the fund awarded 17 students \$5,000 each per school year for tuition and books.

Victor had a long career in the newspaper and public relations businesses and served as an air officer in the U.S. Navy in World II, retiring from active duty in 1946 as Lieutenant Commander.

He lives with his wife Jane in Lost Tree Village, in Palm Beach Gardens and celebrated his 100th birthday in September.

**In 2004, the MacArthur Foundation decided their  
Florida grantmaking should be managed locally, by the  
people who know the local needs best.**



# FINANCIAL Overview

The Community Foundation holds itself to high standards of financial management and transparency and operates efficiently for the interest of our community.

The Audit Committee, together with the Foundation's management and staff ensures rigorous financial controls and high administrative standards.

The Foundation's audited financial statements for 2015-2016 are presented below. We worked closely with our independent auditors, Holyfield & Thomas, to meet our objective and provide an accurate representation of the Foundation's stability as an organization.

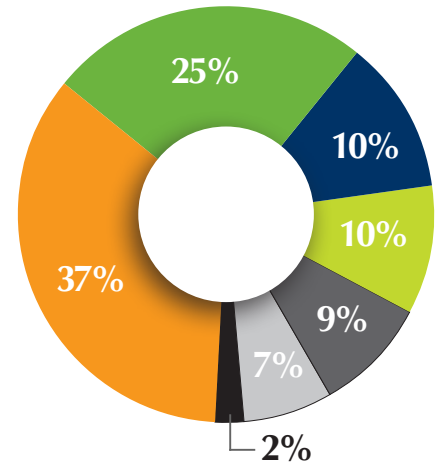
## STATEMENT OF FINANCIAL POSITION as of June 30

Assets	2016	2015
Cash and Cash Equivalents	5,254,183	3,374,282
Contributions and Bequest Receivable	16,456	76,983
Prepaid Expenses and Other Assets	356,617	301,524
Investments	139,625,937	148,466,154
Land, Building and Equipment, Net	7,947,392	8,071,098
<b>Total Assets</b>	<b>153,200,585</b>	<b>160,290,041</b>
<b>Liabilities &amp; Net Assets</b>		
Accounts Payable and Accrued Expenses	378,975	253,282
Agency Payable	1,019,322	653,481
Grants and Scholarships Payable	6,299,339	7,153,434
Bond Issue Payable	6,900,000	6,900,000
<b>Total Liabilities</b>	<b>14,597,636</b>	<b>14,960,197</b>
<b>Net Assets</b>	<b>138,602,949</b>	<b>145,329,844</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>153,200,585</b>	<b>160,290,041</b>

## STATEMENT OF ACTIVITY as of June 30

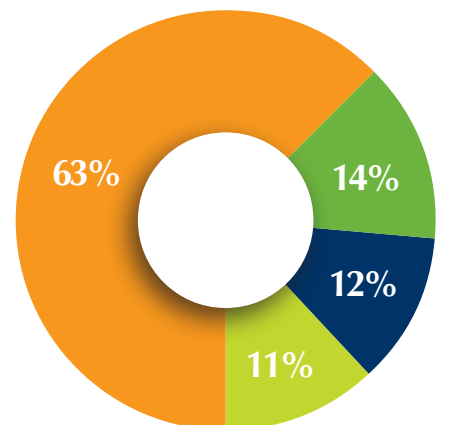
Revenues	2016	2015
Contributions, Grants and Pledges	9,248,171	7,475,748
Investment Income and Other Changes	(4,514,433)	(1,069,751)
Rental and Other Income	242,942	246,632
Other Gain (Loss)	99,498	207,549
<b>Total Revenues</b>	<b>5,076,178</b>	<b>6,860,178</b>
<b>Expenses</b>		
Grants, Net of Cancellations and Returns	8,601,677	9,353,073
Programs and Support Services	3,201,396	3,088,634
<b>Total Grants, Programs &amp; Support Services</b>	<b>11,803,073</b>	<b>12,441,707</b>
<b>Change in Net Assets</b>	<b>(6,726,895)</b>	<b>(5,581,529)</b>
<b>Net Assets at Beginning of Year</b>	<b>145,329,844</b>	<b>150,911,373</b>
<b>Net Assets at End of Year</b>	<b>138,602,949</b>	<b>145,329,844</b>

## ASSETS BY FUND TYPES



Donor Advised	\$51,909,868
Field of Interest	\$34,265,633
Special Purpose	\$13,171,625
Scholarship	\$13,252,159
Unrestricted	\$13,076,014
Supporting Organization	\$9,649,930
Designated	\$3,277,721

## GRANTS BY FUND TYPES



Restricted	\$5,653,713
Supporting Org.	\$1,264,471
Scholarship	\$1,051,200
Unrestricted	\$1,047,383

# Planned **GIVING**



*Southeastern Guide Dogs*

## The Importance of Planned Giving

Charitable philanthropist Joan Sherman had a long time relationship with her wealth advisor John Lacy at Merrill Lynch. She set up documents prior to her death to leave a bequest to the Community Foundation to manage her philanthropy, while continuing to allow Merrill Lynch to manage her assets. Her children now advise a donor advised fund at the Community Foundation in her memory – the Joan and David Sherman Fund. Recently the fund made its first grant which was directed to Southeastern Guide Dogs.



*John Lacy*

*“The Community Foundation offers so many ways for professional advisors to have their client’s funds managed. There is an option for every need – including allowing clients to continue working with their advisor, while taking advantage of the expertise and personal touch of the Foundation to help ensure their philanthropic dollars have the desired impact.”*

– Danielle Cameron,  
Vice President for Personal and Family Philanthropy

## Investment Committee

Anson M. Beard, Jr. – Chair  
Roy J. Zuckerberg  
J. Ira Harris  
William M. Matthews  
Peter Matwiczuk  
Eliot I. Snider  
Douglas A. Stockham

## Finance Committee

Stephen A. Templeton – Chair  
Anson M. Beard, Jr.  
George Elmore  
Andrew Kushner  
Jane M. Mitchell  
Lisa M. Morgan

## Audit Committee

Christopher W. Storkerson – Chair  
George Elmore  
Christina M. Macfarland  
Peter Matwiczuk  
Andrew Kushner

# INVESTMENT Overview

## INVESTMENT MANAGEMENT

At the Community Foundation for Palm Beach and Martin Counties, long term fiduciary responsibility with our investments takes precedence over all else. The intrinsic value of the Foundation's investment management is based on economic principles that run concurrently with our existence in perpetuity. The Investment Committee establishes investment policy and monitors the individual investment managers and their performance on a quarterly basis. The Investment Committee is assisted by Prime Bucholz & Associates, an independent consulting firm.

## INVESTMENT MANAGEMENT AND OPTIONS

The Foundation's investment management goals are to ensure charitable dollars entrusted to us are available in perpetuity while maximizing dollars available for grant-making. A well-diversified investment strategy enables the Foundation to meet these goals.

Our investments are strategically managed by the Investment Committee based on an indefinite time horizon that extends beyond normal market cycles.

The use of a spending policy ensures that charitable funds are protected for the future while having the most impact today. The Board sets each year's spending rate. The 2016 spending rate was 5%.

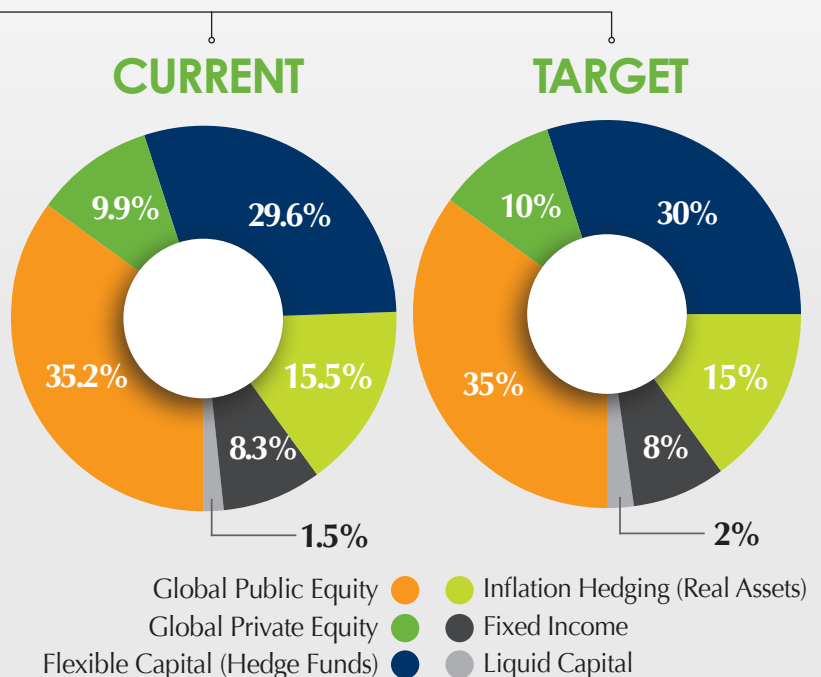
The Foundation offers a long term pool, an intermediate pool and a short term pool. Investments in various pools are reflective of both long term perspective and grant-making needs of the funds. We allow donors to select the option that best matches the time horizon of their charitable giving plans.

## ASSET ALLOCATION

The Investment Committee's objective is to consider the climate and construct an all-weather portfolio that will hold its own and continue to do well in the long term, regardless of near term macro outcomes. The Committee strives to maintain a good balance in the portfolio among asset classes that are expected to perform differently depending on future outcomes.

The endowment's assets include: Global Public Equity, Global Private Equity, Flexible Capital, Fixed Income, Inflation Hedging Assets and a small amount of Liquid Capital.

To ensure good overall value in the portfolio, the Investment Committee actively rebalances the portfolio and considers diversification among multiple asset classes to help reduce the volatility of the Foundation's endowment and moderate market risk.



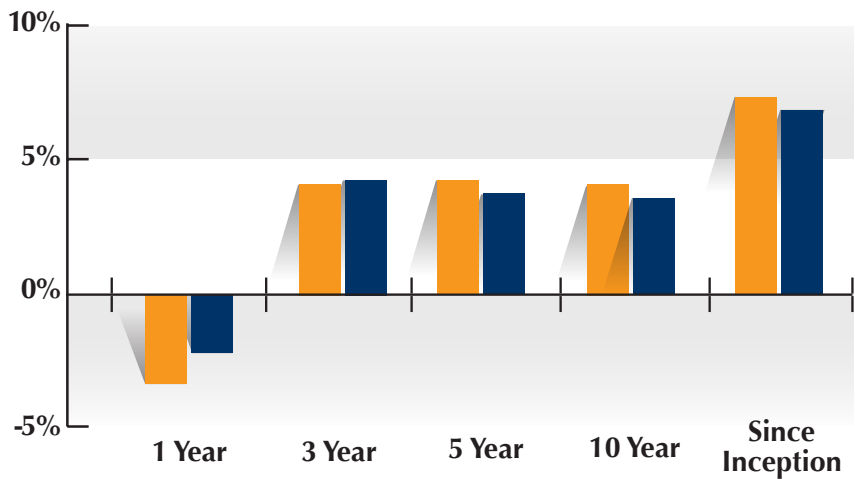


# INVESTMENT PERFORMANCE as of June 30, 2016

	Foundation	Policy Index
1 Year	-3.3%	-2.0%
3 Year	3.9%	4.1%
5 Year	4.0%	3.7%
10 Year	3.9%	3.3%
Since Inception	7.0%	6.6%

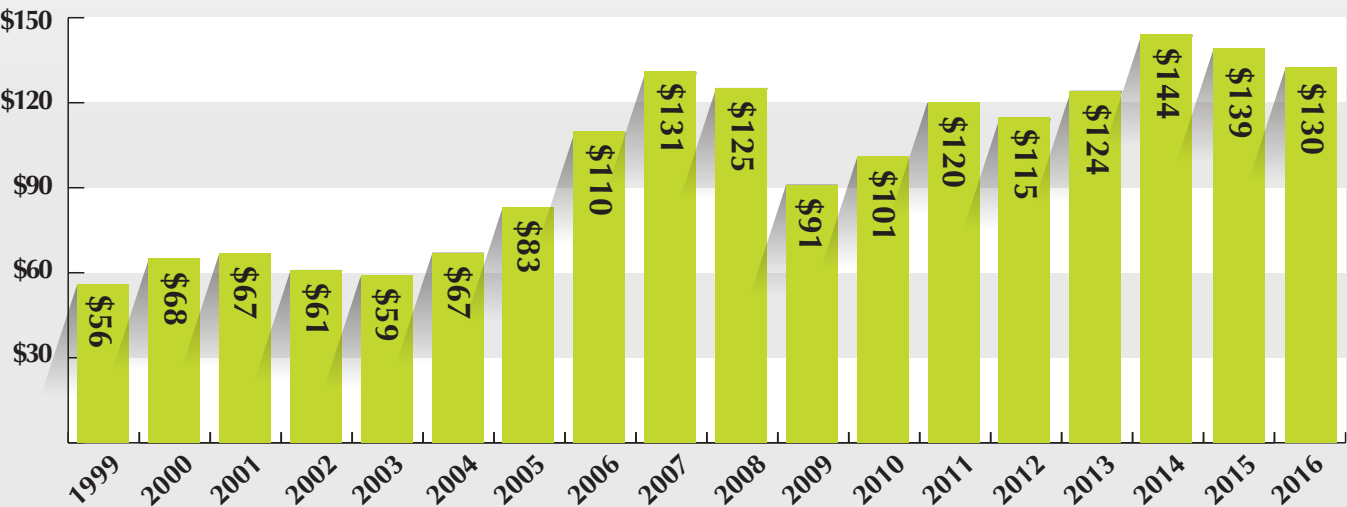
Foundation

Policy Index



# ASSET GROWTH

The Community Foundation’s endowment totaled \$130 million at June 30, 2016. The Foundation’s endowment is our permanent pool of funds invested for long-term growth.



# GRANTS

The Community Foundation is one of the **LARGEST GRANTMAKERS** in the region.

Collectively, the Community Foundation provided over

**\$8.94** million in grants & scholarships in its 2015-2016 fiscal year.

The majority of our annual grantmaking is directed by donors to the causes they care about. Additional grants are made possible through Community Impact Funds, which are established by philanthropists who have entrusted the Foundation to identify and address critical issues and community needs. These grants are awarded through an open and competitive application process.

## 2015-2016 FIELD OF INTEREST GRANT AWARDS: \$123,690

<b>Children's Services of Martin County</b>	<b>\$20,000</b>
- Lawrence A. Sanders Fund to Promote Literacy and the Early Childhood Education Fund	
<b>Clinics Can Help, Inc.</b>	<b>\$5,110</b>
- Bailey Stein Fund and John T. Murray M.D. Children's Health Fund	
<b>Genesis Community Health</b>	<b>\$20,000</b>
- Judy Lake Memorial Fund	
<b>Grandma's Place, Inc.</b>	<b>\$18,000</b>
- Henry and Mildred Baldwin Memorial Endowment Fund and Jack Taylor Fund for Abused and Neglected Children	
<b>Lake Worth West Resident Planning Group, Inc</b>	<b>\$4,240</b>
- Bailey Stein Fund	
<b>Miracle League of Delray Beach</b>	<b>\$3,300</b>
- Cliff Williams Youth Recreation Fund and Perry-Belle and Phillip O'Connell Pioneer Fund	
<b>T. Leroy Jefferson Medical Society</b>	<b>\$5,000</b>
- Judy Lake Memorial Fund	

## 2015-2016 COMMUNITY IMPACT GRANTS: \$1,226,891

<b>ARTS &amp; CULTURE</b>	<b>\$316,498</b>
Ballet Palm Beach	\$38,396
Els for Autism	\$143,882
Expanding and Preserving Our Cultural Heritage, Inc.	\$117,000
dba Spady Cultural Heritage Museum (EPOCH)	
Milagro Center	\$31,470
YMCA of South Palm Beach County	\$22,750
- Funded by John D. and Catherine T. MacArthur Fund	

<b>FOREVER ARTS &amp; CULTURE ENDOWMENT CHALLENGE</b>	<b>\$250,000</b>
Center for Creative Education	\$25,000
Centre for the Arts at Mizner	\$25,000
Elliott Museum/Historical Society of Martin County	\$25,000
Loggerhead Marinelife Center	\$25,000
Loxahatchee River Historical Society	\$25,000
Palm Beach Symphony Society	\$25,000
Sandoway House Nature Center	\$25,000
The Arts Council	\$25,000
Young Singers of the Palm Beaches	\$25,000
Zoological Society of the Palm Beaches	\$25,000
- Funded by John D. and Catherine T. MacArthur Fund	

<b>AFFORDABLE HOUSING</b>	<b>\$190,860</b>
Adopt-A-Family	\$25,860
The Lord's Place	\$165,000
- Funded by MacArthur Foundation Housing Initiative	

<b>NEIGHBORHOOD REVITALIZATION COMMUNITY DEVELOPMENT</b>	<b>\$148,362</b>
House of Hope	\$128,362
Planned Parenthood of South Florida and the Treasure Coast	\$20,000
- Funded by John D. and Catherine T. MacArthur Fund	

<b>YOUTH</b>	<b>\$140,521</b>
Best Foot Forward	\$99,121
Friends of Foster Care Children of Palm Beach County	\$41,400
- Funded by the Hans and Mary Stratmann Fund	

<b>EDUCATION</b>	<b>\$55,000</b>
Education Foundation of Palm Beach County	\$55,000
- Funded by John D. and Catherine T. MacArthur Fund	

<b>ALLEVIATE HUNGER</b>	<b>\$50,000</b>
Palm Beach County Food Bank	\$50,000
- Funded by the Community Impact Fund	

# GRANT HIGHLIGHTS

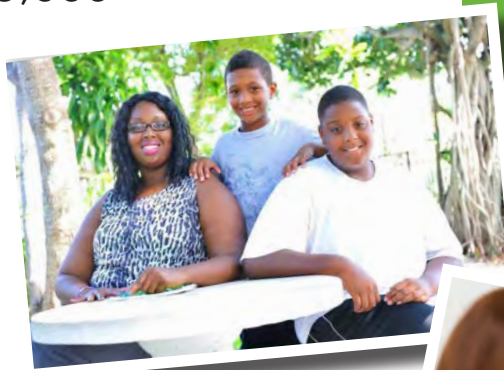


## BEST FOOT FORWARD \$99,121

Best Foot Forward's Grounded for Life program empowers youth in foster care to become productive members of society through academic success by providing an advocate to support their achievements in school and in life. Students commit to specific goals and are assigned to a graduation coach and/or college advisor.

## THE LORD'S PLACE \$165,000

Burckle Place, a project of The Lord's Place, provides housing programs exclusively for hundreds of single, homeless women who often do not qualify for other programs. Burckle Place is centered on the principle that the best environment to foster growth and empowerment is one rooted in community and fellowship. Burckle Place focuses on empowering each woman to secure housing and rebuild their lives.



## ELS FOR AUTISM \$149,629

Els for Autism will design and program a Sensory Arts Garden Environment (SAGE), a therapeutic garden experienced via touch, sight, hearing, smell, taste and movement. The garden will offer educational and employment opportunities while also serving as a space utilized by the community.



# GRANT MAKING

The Community Foundation improves communities through the power of giving. Based on this mission, the Foundation's grantmaking programs build the capacity of organizations to address important issues and thrive.

We welcome applications and proposals from nonprofit organizations and students throughout Palm Beach and Martin Counties. We invite you to visit our website for detailed information on criteria, guidelines and how to apply for a grant or scholarship.

To learn more about applying for a grant, please visit:  
[yourcommunityfoundation.org/grants](https://yourcommunityfoundation.org/grants)

To learn more about applying for a scholarship, please visit:  
[yourcommunityfoundation.org/scholarships](https://yourcommunityfoundation.org/scholarships)





# CARING for Martin County



## Community Foundation for Palm Beach and Martin Counties is one of the largest funders in Martin County.

Our relationship with Martin County started when local philanthropists Barbara “Bobbie” Briggs Trimble and her husband, Edward “Ted” C. Trimble, established the Briggs-Trimble Family Charitable Fund in 1989 at the Community Foundation to assist their favorite Martin County organizations. In 1991, the “Palm Beach County Community Foundation” expanded to accommodate Martin County and became the Community Foundation for Palm Beach and Martin Counties. Now, 21 nonprofit organizations receive checks each year due to the Trimble’s fund.

The Trimbles also endowed two scholarship funds with the Foundation to benefit Martin County students.

*Son David Trimble and his wife Lisa*

**“Together, the Trimble funds have awarded more than \$2 million in grants and \$249,000 in scholarships,” said Bradley Hurlburt, President and CEO at the Foundation. “Both Trimbles served as members of the Community Foundation’s Board of Directors and were strong advocates for friends and neighbors in Martin County. We are honored to preserve their charitable legacy at the Foundation.”**



*Jane Goodall and Bobbie Trimble*

The Golden Gate community is an impoverished neighborhood in Martin County, where more than 25% of residents live below the poverty line. Lack of transportation, limited access to technology, high crime and unemployment rates have plagued the community for years.

But our local nonprofit organizations are working hard to create change and help the families living in the Golden Gate community. Here are a few of our recent grants to assist the Golden Gate community.



### HOUSE OF HOPE

**\$128,362**

House of Hope’s Golden Gate Center for Enrichment offers programs, classes and informational sessions in education, vocational training, life skills, health and nutrition, arts and culture and library services to the Golden Gate neighborhood. The Center offers a vast array of services and programs to help residents live a better way of life, paving the way to breaking the cycle of poverty.

### LIBRARY FOUNDATION OF MARTIN COUNTY

**\$163,293**

The Library partners with the Martin County Community Development Department, the Arts Council of Martin County, local artists and residents to provide space for an art gallery and art instruction within the Golden Gate community, helping residents engage, connect with others, learn and create.

### HABITAT FOR HUMANITY OF MARTIN COUNTY

**\$108,333**

Habitat for Humanity of Martin County helps spruce up the Golden Gate community by performing minor rehabilitation to homes in need with its “A Brush with Kindness Program”. This program provides a cost effective opportunity to revitalize current homes in the community without having to start new construction.

# SCHOLARSHIPS

## Community Foundation Awards **OVER \$1 MILLION IN SCHOLARSHIPS**

This year, 123 deserving students will fulfill their educational dreams thanks to the donors of the Community Foundation for Palm Beach and Martin Counties. These students are the recipients of \$1,051,200 in scholarships awarded by the organization.

The Community Foundation has awarded more than \$9.3 million in scholarship grants since 1983, and helped 1,923 students, making it one of the largest providers of scholarships in the two counties.

View the entire list of scholarship winners at  
[www.yourcommunityfoundation.org](http://www.yourcommunityfoundation.org)

*I'm very thankful to the Community Foundation because they provided me with the tools I needed. They showed me that I can do it, and that anything is possible. Thanks to the donors at the Foundation, I can have an education and with this, I promise to make the world a better place."*

- Julian Acierno,  
2016 scholarship recipient



*I was shocked to learn I won a scholarship from the Community Foundation. They believed in me and saw how passionate I was about becoming a teacher... and now I can pursue my dreams."*

- Bria Holmes,  
2016 scholarship recipient



### **DONOR HIGHLIGHT:**

#### **The James H. Davis Memorial Scholarship Fund**

(awarded scholarships to students Palmer Crippen from Alexander W. Dreyfoos School of the Arts and Dominick Avallone of Jupiter Community High School)

The James H. Davis Memorial Scholarship Fund was established with the Community Foundation in 1996 through donor James Davis' estate. James came from a long line of farmers raising sugar cane and managing potato farms. He created The Davis Tree Farm in 1978, over 125 acres of trees and palms, selling mainly to landscapers in Palm Beach County. His scholarship fund was created to assist students in high school or college pursuing a career in agriculture, horticulture, turf grass, forestry, other agricultural science or dealing with the production and management of plants.

### *Consider establishing a scholarship fund...*

- ... when you want to make a difference in the lives of others.
- ... because you see the potential in every student.
- ... because you understand a college degree increases lifetime earning potential by more than \$1,000,000.
- ... because you share a belief that each student should have this opportunity regardless of their financial situation.



# SPECIAL Events



## MAKE COMMUNITY FOUNDATION GALA 2016 YOUR MARK

### MAKE YOUR MARK GALA & GALA GIVING CIRCLE

Co-chairs Frances Peter, Christina Macfarland and Caroline Rafferty brought a special energy to the Community Foundation's annual gala at the Breakers this year, raising over \$400,000 to support its local leadership work.

Over 300 guests attended 'Make Your Mark' on January 29th at the Breakers – an edgy, street-art themed gala.

*Left:* Frances Fisher, Caroline Rafferty, Christina Macfarland  
*Below:* Anson and Debra Beard

## GALA HIGHLIGHTS

The highlight of the evening was a special presentation of the inaugural Gala Giving Circle. This year, gala chairs decided to participate in the Community Foundation's grant making and create a giving circle – a form of participatory philanthropy where members donate to a pooled fund and decide where to make an impactful grant. **Giving Circle members presented an incredible \$23,000 grant to the Center for Creative Education.**





## FOUNDER'S AWARD LUNCHEON



The Community Foundation for Palm Beach and Martin Counties hosted its third annual Founder's Award Luncheon on Monday, May 16, 2016 at the Kravis Center's Cohen Pavilion. The exciting program honored the Mary and Robert Pew with the Founder's Award for the impact on education it has made in the community. Dr. Robert Avossa, School Superintendent of Palm Beach County, served as keynote speaker.



*William Matthews, Julie Fisher Cummings, Brad Hurlburt, John Pew, Stephanie Pew*



*Karen Krumholtz, Ann Rutherford, Barbara Schmidt, Wendy Friswell*

## THE INAUGURAL MARTENS AWARD LUNCHEON

Honoring the spirit of giving in Boca Raton



The Community Foundation for Palm Beach and Martin Counties hosted its inaugural Martens Award Luncheon on Wednesday, October 28, 2015 at the Polo Club of Boca Raton. Spirit of Giving was honored with the Martens Award for its extraordinary service in the community. Barbara M. Schmidt, author and Board member of the Schmidt Family Foundation, provided a keynote address.

## THREE YEARS OF GREAT GIVE

This year's Great Give raised an incredible total of \$3.2 million for a record breaking 504 nonprofits on Tuesday, May 3. Thank you to everyone who has been involved the past three years!



### HOST PARTNERS THROUGH THE YEARS



# STAFF

**Bradley A. Hurlburt,**  
President and CEO

## Finance & Administration

**Gloria Ortega Rex, CPA, MBA,** Executive  
Vice President & Chief Financial Officer

**Sue Sharra,** Controller

**Sandra Mari,** Accounting Specialist/  
Facilities Coordinator

**Alba Modes,** Contributions Analyst

**Sandra Reid,** Administrative Assistant

## Development & Communications

**Danielle Blangy Cameron, CAP®,**  
Vice President for Personal and Family  
Philanthropy

**Corrie Edwards,** Marketing and  
Communications Manager

**Kati Erickson,** Development Manager

**C. Bonnie Mitchell,** Donor Services  
Officer

**Lisa Huertas,** Major Gifts Officer

**Chelsea Smith Reed,** Development  
Associate

## Community Investment

**Renee Constantino,** Vice President  
for Community Investment

**Daryl Houston,** Community  
Investment Officer

**Stephanie Mejias,** Grants and  
Scholarship Administrator

## Photo Credits

Tracey Benson Photography  
Capehart Photography  
LILA Photo

## Design and Printing

Kind Design Advertising  
[www.kinddesign.com](http://www.kinddesign.com)



*Not pictured: Alba Modes*

## 30 Years of Service Danielle Blangy Cameron Retires From Community Foundation



The Community Foundation extends a warm farewell to Vice President for Personal and Family Philanthropy Danielle Blangy Cameron. After 30 years of service, she is retiring and will be missed dearly.

### An Interview with Danielle

**Year she joined CFPMB:** "I joined the Foundation in 1987 as an assistant to Founding President Shannon Sadler Hull."

**Previous job before the Community Foundation:** "I worked at Chase Manhattan Bank at the main office in Wall Street for 15 years."

**Memorable moments:** "I was here when we received one of the first major gifts - the bequest gift of Marie Graber Martens in 1990. Her gift alone more than doubled the assets of the Foundation. It was the first time I fully understood the meaning of the word "philanthropy": love of mankind. What an incredible woman who placed her confidence and established her legacy with the Community Foundation to continue to support community needs in perpetuity. I was also here during the financial crisis

"It has truly been an honor and a privilege to have served our community of donors for the past 30 years. It was an experience that enriched my life and that of my family. I will be eternally grateful for this incredible adventure at the Community Foundation for Palm Beach and Martin Counties."

of 2009 - a difficult time for all. The Foundation's portfolio was down 20%. Donors who had established endowed funds now were faced with having no funds available for grantmaking. They entrusted their family's endowed legacy with us and we recovered nicely."





## **The Community Foundation for Palm Beach and Martin Counties**

began as the Palm Beach County Community Foundation in 1972. We were established to build a charitable endowment that will meet the changing needs of the community - forever. Today, we are one of the largest community foundations in Florida serving two counties with more than 300 funds and \$154 million in assets. Our impact is only possible through our fund holders, donors and supporters that have helped us improve the lives and opportunities of our residents – both now and in the future.



*"The great use of a life is to spend it for  
something that outlives it."*  
– William James



Your Philanthropy  
Our Community  
Better Together

**office** 561.659.6800 **fax** 561.832.6542  
700 S. Dixie Highway, Suite 200  
West Palm Beach, FL 33401  
**web** [yourcommunityfoundation.org](http://yourcommunityfoundation.org)  
**facebook** /cfpbmc **twitter** @cfpbmc

