



2013-2014 ANNUAL REPORT

# It takes the Community Foundation



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

Your Philanthropy  
Our Community  
Better Together



We are  
Palm Beach and  
Martin Counties'  
community  
foundation.

We have a deep  
knowledge and  
understanding of  
the needs of the  
community.

We make it easy  
for donors to  
help others.

- We are led by a diverse board of community leaders that manages charitable funds for more than 300 like-minded, local individuals, families, businesses and nonprofits who are connected by their passion for making a difference.
- We have a 40-year history of community leadership, and together with our donors and fund holders, we have awarded nearly \$110 million in grants and scholarships – making us one of the largest grant makers in the region.
- We are one of the largest community foundations in Florida, and one of more than 700 across the country.
- We engage in 'community building' by providing grants and scholarships to meet our community's critical needs and to improve the quality of life of our residents – both now and in the future.
- We are 'building community' by fostering collaborative relationships and facilitating conversations that address emerging challenges in Palm Beach and Martin counties.
- We promote philanthropy as a community investment, and we work to grow charitable giving to all nonprofits in the region.
- For more than 40 years, we have been the bridge that connects donors to the issues and causes they care about, and to the people in our community who need them most.
- We offer personalized, flexible giving options for individuals, families and businesses that help them achieve their philanthropic goals in a meaningful and effective way.
- We organize our donors' philanthropy and simplify record-keeping – one donation to a fund at the Foundation allows giving to multiple nonprofits over time with one receipt for the IRS. Our donors can even make grants easily through our website.

*"This year marks the 100th Anniversary of the first community foundation in Cleveland, Ohio. Today, there are over 700 foundations across the country working with local residents who want to make a difference. Together, we are building endowments that will serve community needs now and in the future."*

This year, America's oldest community foundation, the Cleveland Foundation, celebrates its 100th anniversary. This Community Foundation Centennial gives our field the chance to collectively demonstrate the history, influence and exciting future of community foundations which serve as philanthropic hubs for local communities.

Community foundations offer donors many advantages when it comes to managing their charitable giving. We are local organizations guided by a board of directors with diverse fields of expertise. We work with donors of all kinds to bring charitable dreams to life, and we rely on broad community input to make informed community investments. Your community foundation is now 42 years old, and it is through your trust and support that our assets have grown to \$170 million and that we have awarded nearly \$110 million in grants and scholarships over our history.

Our impact on this community is only possible because people from all walks of life have contributed as little as \$25 to millions. Anyone can participate with the Community Foundation to support our community. One of the first bequests we received was from a gentleman in Ocean Ridge who left \$81,000 to support the environment. That gift was placed in a fund that has generated over \$200,000 in grants while increasing in value to \$220,000. The Foundation's prudent investment policy and stewardship assures Mr. McGinty's legacy will live on long after we are gone.

As I reflect on my first full year as president and CEO, I am proud of the accomplishments we have made in our 2013/2014 fiscal year. Most importantly, with the help of our donors, we awarded \$8.9 million in grants, including \$730,000 in scholarships to help

83 exceptional high school students. We held a successful gala at the Flagler Museum to support our leadership work in the community; created an unprecedented partnership with the United Way of Palm Beach County to host the inaugural Great Give, which raised \$2.2 million for our local nonprofits; and awarded our first-ever Founder's Award to two philanthropists who have changed the community with their generosity. We celebrated our outgoing board chairman, Debbie Pucillo as she ended her term, and welcomed our new board chair, J.B. Murray.

A leading priority for the Foundation will always be to promote philanthropy in this community. If someone truly loves their community and wants to make a difference today, or after they're gone, I hope they will consider the Community Foundation. We connect philanthropists to community causes and issues in a way that will last forever. To help illustrate our story, we asked some of our donors to tell us why they partnered with the Community Foundation for their giving. You can read their inspiring stories on the next few pages, and you will see many more later this year when we launch a new advertising series.

Thank you to the entire community for your support. Our accomplishments were only made possible through the generosity of donors like you. I am excited about the future, and I look forward to working with you to make your philanthropic dreams and aspirations a reality. Contact me anytime at (561) 340-4502 or [bhurlburt@cfpbmc.org](mailto:bhurlburt@cfpbmc.org).

  
**Bradley Hurlburt**  
President & CEO



## Highlights from the Year

**Total Assets:**  
\$170 Million

**Total Grants Awarded:**  
\$8.9 Million

**Total Gifts Received:**  
\$5.1 Million

**New Funds:** 13

**Total Number of Funds:**  
Almost 300  
and growing!

**Cumulative Grants  
(since inception):**  
\$108 million



*"It is not we who will shape the future of the world, but our sons, our daughters and grandchildren. Unless we help the youth get the proper start in life, we will have no future. I hope that through my involvement, some person will learn the basics of starting or managing a business, or have the desire to expand upon a dream – and that will keep this country ticking."*

## The **SCIENCE** of Giving

In 1953, George Elmore and his wife, Wilma, began their paving business. Two trucks, a modest loan and an emerging entrepreneurial spirit became what is today Hardrives, Inc. With the enduring support and assistance of Wilma, the business evolved into one of the most prominent paving and contracting operations in the county. As the company grew, George became a catalytic and influential force in Palm Beach County. Believing that you should return to the community what the community has done for you, George's philanthropic ventures have included both time and dollars. He continues to serve on numerous boards and committees, and is on his second term on the Community Foundation board. He has two donor advised funds at the Community Foundation that support nonprofits in the areas of science, education and entrepreneurship.

Max Planck Florida Institute  
for Neuroscience  
Jupiter





Arts Garage  
Delray Beach



*It was an evening of big impact on April 10 when 320 women gathered at Lynn University's Wold Performing Arts Center to award \$320,000 to five nonprofit groups. The event was Impact 100 Palm Beach County's Grand Awards Celebration. Each of the finalist nonprofits had the opportunity to describe their project, their vision and what the high-impact grant would mean for their organization and the community. Afterwards, Impact members voted and the three with the most votes received a grant of \$100,000 each. Winning organizations were the Achievement Centers for Children and Families of Delray Beach for their Pine Grove Afterschool and Summer program; Florence Fuller Child Development Centers for their Family Preservation Program; and The Creative City Collaborative (CCC), also known as the Arts Garage, for their Music and Theatre Education Program. In their three-year-history, Impact 100 has awarded a total of \$688,000 to organizations serving south Palm Beach County. [impact100pbc.org](http://impact100pbc.org)*

## Making an **IMPACT**

As a working mom with a new baby, Goldman Sachs executive Tandy Robinson learned about Impact 100 in 2008 through a friend in Vero Beach. The concept is simple: local women are invited to join for \$1,000, the monies are pooled, and then members vote at one annual meeting to make a \$100,000 grant to the local nonprofit they feel will make the greatest impact on the community. This philanthropic model was being replicated around the country, and the idea really resonated with the Delray Beach resident. In 2011, Tandy co-founded Impact 100 Palm Beach County, which is operated as a donor advised fund at the Community Foundation. She decided to partner with the Foundation on this initiative because of our 40-year track record of community leadership and grant making. The group has become so successful that Tandy is being honored as Outstanding Volunteer Fundraiser on National Philanthropy Day 2014.





## Preserving the ENVIRONMENT

When Thomas Ladue McGinty died in 1986, he left behind his 60-year-old beach home in Ocean Ridge, \$1 million, and three million shells. Although he was well known by experts in the field as an amateur naturalist and malacologist, it was not until after his death that the extent of his knowledge of mollusks and the enormity of his collection was revealed. Tom and his brother Paul (who died just eight months before Tom) moved to Florida in the 1940s. Tom was appointed Chief of Police of Ocean Ridge in 1949, and worked his entire lifetime to collect and label shells and fossils from around Florida waters. A portion of his estate established a field of interest fund at the Community Foundation to support environmental needs, organizations or projects that conserve the natural resources in and around Palm Beach County. The fund was established with \$81,000 in 1988 and has grown to over \$220,000 in assets today. More importantly, Tom's fund has awarded more than \$210,000 in grants over the last 25 years – giving away over two times its original value and demonstrating the power of endowment.



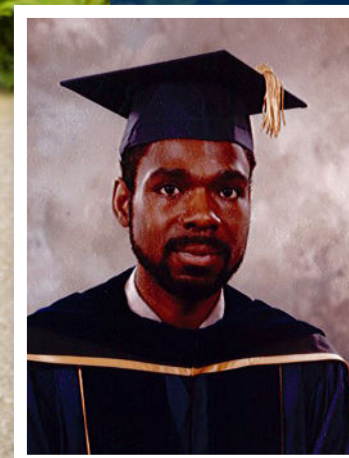
South Florida Science  
Center and Aquarium  
West Palm Beach





## EDUCATING Our Future Leaders

Dr. Dorothy Adams Peck fell in love with helping others at a young age. When she moved to Palm Beach County in 1969, her first teaching position was at Roosevelt and Palm Beach High Schools – now the Dreyfoos School of the Arts. She later became Area School District Superintendent, and began doing missionary work in Africa after retirement. Her son shared her passion for education, travel and foreign languages. He was proficient in eight languages and was a professor of Romance Languages at U.C.L.A.



When he passed away, Dorothy created a scholarship fund to honor his memory and continue his legacy of educating future generations. She also has a planned gift with the Community Foundation, and is a member of our Legacy Society  
*(see full list in the middle fold-out of this report).*

*Dreyfoos School of the Arts  
West Palm Beach*





**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. Today, we are one of the largest community foundations in Florida serving two counties with almost 300 funds and an endowment of \$144 million. These pages contain the names of our fund holders, donors and supporters that have helped us improve the lives and opportunities of our residents – both now and in the future.

**More than \$44 billion will be passed down to the next generation over the next decade in Palm Beach and Martin counties. If just 5% could be captured for philanthropy, our community could have an additional \$111 million a year – forever.**

\*Transfer of Wealth Study commissioned in 2012 by Florida Philanthropic Network. Based on capturing 5% of transferred wealth for permanent endowment with 5% payout rate.







(Seated) Jesse D. Newman and Winsome McIntosh;  
(Standing) William E. Benjamin II; Dr. Donald E. Warren;  
Harry A. Johnston II, Esq.



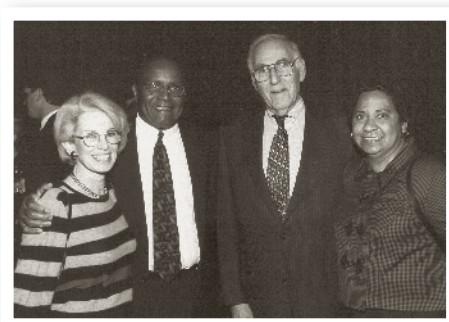
Lore Dodge and Dan Ponton



Shannon Sadler and Robert Hull



Dwight L. Allison, Jr.; Marjorie Fisher;  
William E. Benjamin II



Pearl Weinstein; Dr. William Bryant;  
Richard Weinstein; Taunya Bryant



Bebe Warren; Dr. Donald Warren;  
Helen Cluett



Paul R. Ilynsky; George H. Bailey; Robert A. Satter;  
William E. Benjamin II; J. Bradford Greer;  
John B. Dodge; George T. Elmore

## ANNUAL SUPPORT

### \$100,000

- Anonymous Gift

### \$50,000 & above

- The John A. Hartford Foundation
- Roy J. Zuckenberg Family Foundation

### \$25,000 & above

- Mr. and Mrs. Anson M. Beard, Jr.
- Marjorie S. Fisher Fund
- Charles and Ann Johnson Foundation
- Northern Trust

### \$10,000 & above

- 1st United Bank
- Mr. George T. Elmore
- The Fisher Cummings Family Fund of the Community Foundation for Southeast Michigan
- Mr. and Mrs. Royall Victor III
- Northern Partners Group

### \$1,000 & above

- Appomattox Advisory
- Mr. and Mrs. Joseph R. Atterbury
- The Barrat Family Fund
- BDO USA
- Bessemer Trust
- Dr. and Mrs. Francis J. Bonner Jr.
- Mr. James R. Borynack
- Patrick Carney Foundation
- Celedinas Insurance Group
- The Chairman's Fund
- Mr. and Mrs. Robert Chapin
- Chilton Trust Company
- Coleman Family Fund
- Howard P. Colhoun Family Foundation
- Mr. Mark W. Cook
- Cox Media Group
- Cummings & Lockwood LLC
- Ms. Diane de la Begassiere
- Mr. and Mrs. James K. Dobbs III

### \$5,000 & above

- Mr. and Mrs. Peter M. Bernon
- William E. and Janet Burrows James Foundation
- Mr. and Mrs. John B. Dodge
- Florida Power and Light Company
- Dr. and Mrs. Paul Gingras
- The Hurlburt Family Fund

- Jasteka Foundation
- The William and Phyllis Mack Family Foundation
- William Morrison Matthews Fund
- The McIntosh Foundation
- Ms. Elizabeth R. Moran
- Mr. and Mrs. Robert E. Morrow
- Mr. and Mrs. Michael Pucillo
- Mr and Mrs. Bailey B. Sory
- Squire Patton Boggs (US)
- Ms. Susan S. Stautberg
- Richard and Lesley Stone Family Fund
- Templeton & Company
- Harold and Anna S. Ullian Charitable Foundation
- Mr. and Mrs. Royall Victor III
- The Walden Fund
- Herbert Weber Fund
- Roberta and Stephen R. Weiner Scholarship Fund
- Weinstein Family Fund
- Fred P. and Sophia D. Weissman Unrestricted Fund
- The Weitz Company Scholarship Fund
- White Hat Charitable Fund
- Cliff Williams Youth Recreation Fund
- Friends of the Gerald A. Williams, Esq. Academy
- Williamson Pioneer Fund
- Ralph O. Wood Memorial Scholarship Fund
- Dave Yanis Scholarship Fund
- Robert Yates Charitable Fund
- Youth Music Fund for Conserving Classical Music Education Inspired by Alice Pyle Walker Maxey
- Joseph Zimmerman Charitable Foundation Fund
- R. J. Zuckenberg Palm Beach Fund

- Mrs. Mary C. Funston
- Mrs. T. Richard Garlington Jr.
- The Gingras Family Fund
- Mr. and Mrs. Murray H. Goodman
- Mr. and Mrs. Robert F. Greenhill
- Ms. Peg Greenspon
- Gulfstream Goodwill Industries Foundation
- Ms. Susan G. Guttman
- Mr. and Mrs. William H. Hamm III
- Mrs. Sylvia K. Hassenfeld
- Holyfield & Thomas, LLC
- Mr. and Mrs. Richard Horowitz
- Mr. and Mrs. John P. Keller
- Dr. and Mrs. Ronald Koch
- Raymond F. Kravis Center for the Performing Arts
- Mr. Andrew Kushner
- Mr. and Mrs. Peter E. Lacaille
- Mr. Jonathan Low and Ms. Kathleen Kroll
- Mr. and Mrs. Robb Maass
- Mr. and Mrs. Benjamin S. Macfarland III
- David and Hildegard Mahoney Foundation
- Dr. Lorraine Mari
- Mr. and Mrs. Alexander W. Matthews
- Mrs. Arthur I. Meyer
- Mr. and Mrs. Lawrence J. Miller
- Mr. John A. Moran
- Ms. Lisa N. Mulhall
- The Murray Foundation
- New York Community Trust
- Mr. David G. Ober
- Mr. and Mrs. James F. Orr III
- Palm Healthcare Foundation, Inc.
- Place of Hope
- Prime, Buchholz & Associates

- Quantum Foundation, Inc.
- Quantum House
- Richter's of Palm Beach
- Ms. Tandy Robinson
- The Rodman Foundation
- E. Burke Ross, Jr. Charitable Foundation
- Scripps Florida
- Ms. Maureen Shenkman
- Mr. and Mrs. Douglas A. Stockham
- Mr. Richard Stone and Ms. Lesley Blackner
- Mr. and Mrs. John H. Surovek
- Mrs. Edward C. Trimble
- UBS Financial Services Inc.
- University of Miami
- Wells Fargo Private Bank
- Mr. Jim Haymes & Ms. Pam Whitton

### \$500 & above

- Mr. and Mrs. Laurence M. Austin
- Mr. and Mrs. Alfred R. Bell Jr.
- Mr. and Mrs. James B. Bertles
- Mr. and Mrs. G. Ryan Bridger
- Chase Card Services
- Goldman Sachs Company
- Mr. John Herrick Gooch
- Ms. Pamela S. Gottfried
- Mr. and Mrs. Daniel A. Hanley
- J. P. Morgan
- Ms. Suzanne W. Lanigan
- Ms. Carey O'Donnell
- Mr. and Mrs. Michael Peacock
- Mr. and Mrs. Todd F. Peter
- Mr. and Mrs. Milton Prigoff
- Sabadell United Bank
- Mrs. Virginia Smith
- Mrs. Charles T. Stewart

Complete list of 2013/2014 annual supporters online at: [yourcommunityfoundation.org](http://yourcommunityfoundation.org)

\*Deceased



The Legacy Society recognizes those donors who have included the Community Foundation in their planned and estate gifts. Through their thoughtful generosity, these donors have created a legacy to ensure the future vitality of our community.

Mr. Frank E. Altobello  
Gail and Stig\* Bjork  
Mr. Robert Bodington  
Dr. and Mrs. William J. Bryant  
Michael S. Buckner Esq.  
Danielle Blangy Cameron  
Barbara Bishop Chapin  
Mr.\* and Mrs. Donald Dahlberg  
Mr. Daniel E. Drennen II  
Ms. Carol DuBois  
Dr. and Mrs.\* William Earnhart  
Dr. and Mrs.\* Robert W. Eddleman  
Ms. Diane M. Freaney CPA  
Mr. and Mrs. Barry H. Goldman  
Mr. and Mrs. Kenneth L. Groves  
Mr. and Mrs. Patrick Henry  
Mr. Thornton M. Henry  
Mrs. Phyllis Hopman  
Mrs. Shannon Sadler Hull  
Abby Gelles Knott  
Brenda M. Magee, Ed.D.  
Col. and Mrs. John A. Marshall  
Ms. Maria Mamlouk  
Mrs. Connie McEvoy  
Dr. Dorothy Adams Peck  
The Hon. Edward Rodgers  
Mr. Leon M. Rubin  
Mr. and Mrs. Frederick Runkel  
Mr. and Mrs. Kenneth L. Shepard  
Mrs. Florence Trefry  
Anonymous (13)

## OUR FUNDS

\*New fund this year

- 211 Palm Beach Treasure Coast Endowment Fund
- Helen Harting Abell Fund
- Sheldon B. Ackerman Fund
- The Acorn Fund
- Advisors for Philanthropic Impact Fund\*
- Albert and Marjorie Alius Fund
- Dwight and Lyona Allison Fund for Administrative Endowment
- Lyona and Dwight L. Allison, Jr. Fund
- ALS Awareness and Education Fund
- Americans For Recovery 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
- Edward T. Bedford Foundation Scholarship Fund
- William E. Benjamin, II Fund
- William E. Benjamin, II Unrestricted Fund
- Maura and William Benjamin Scholarship Fund
- Bennett/Darwin Family Scholarship Fund
- Thomas William Bennett Memorial Scholarship Fund
- John H. Birdsall Family Fund
- Lisa Bjork Memorial Scholarship
- George W. Blabon, III Fund
- George W. Blabon, III Endowed Fund
- Thomas H. Blash and Martha Blash Research Fund
- Walter & Adi Blum Scholarship Fund
- Helen and Bob Bodington Fund
- Gina Auditore Boner Memorial Scholarship Fund
- Boone Horticultural Scholarship Fund
- Mary R. and William C. Bowden Fund
- Briggs-Trimble Family Charitable Fund
- Harry and Bertha Bronstein Memorial Scholarship Fund
- 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
- The Chairman's Fund
- Chapin/Kiefer 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
- Bradley Collins Memorial Scholarship Fund
- Bradley and Carol Collins Fund
- Colonial Bank Scholarship Fund
- Community Fund to End Homelessness in Palm Beach County
- Community Garden Green Fund\*
- Community Impact Fund
- Community Scholarship Fund
- Mark W. Cook Fund
- Christopher N. Coppola Scholarship Fund
- Ingeborg Crede Memorial Scholarship Fund
- Cuban Scholarship 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 Fund
- James H. Davis Memorial Scholarship Fund
- Delray Beach Playhouse Ernest G. Simon Scholarship Fund
- The de Peyster Family Fund
- Margo and Ashton de Peyster Fund
- Don Donahue Fund
- The Dreyfoos Fund
- Rebecca Walter Dunn Fund
- Early Childhood Education Fund
- Early Learning Coalition of Palm Beach County Fund
- Easter Seals Palm Beach, Martin and St. Lucie Fund
- Ellen Beth Eddleman Memorial Scholarship Fund
- George and Wilma Elmore Fund
- The Environmental Fund
- Families First of Palm Beach County Foundation, Inc.
- Ruth Lewis Farkas Fund
- H. David Faust Memorial Scholarship Fund
- The Nettie Spiro Finkle Scholarship Fund
- First Bank and Trust of Indiantown Directors Memorial Scholarship Fund
- Mary D. Fisher Fund
- Flah Family Foundation for Childhood Trauma
- Cristina H. Flanagan 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
- Galadriel Peace Fund
- Galadriel Peace Fund II
- Gale Academic Leadership Endowment Fund
- Katherine and Richard Garlington Fund
- Robert P. and Marilyn W. Gatewood Fund for Children
- Fran Gay Memorial Scholarship Fund
- John Giba Youth Leadership Fund
- The Gingras Family Fund\*
- Gionfriddo Health Education Fund
- The Jackson Family Foundation 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
- The Gratitude Fund
- The Gubelmann Family Foundation Scholarship Fund
- Gurto Family Fund
- Jane and Gene Guttman Fund
- Robert D. Handley Memorial Scholarship Fund
- Hardrives of Delray, Inc. Fund
- Harrington Scholarship Fund for Martin County\*
- J. Ira and Nicki Harris Fund
- 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
- J. Peter Hoffman Memorial Scholarship Fund
- Phyllis Hopman Arts and Culture Fund
- Ray Howland Scholarship Fund
- The Hurlburt Family Fund\*
- Frank P. Husvar Memorial Scholarship Fund
- Impact 100 Palm Beach County
- The Jackson Family Foundation Fund
- Richard G. Lepeska Fund
- Robert and Deborah Jacobson Scholarship Fund
- The Freddie Stebbins and James Julius Jefferson Family Fund
- R. Bruce Jones Memorial Scholarship Fund established by the Sugar Cane Growers Cooperative of Florida
- K2 KIDS
- Alfred and Elizabeth Kay Memorial Fund
- Thomas F. Kearney Memorial Scholarship Fund
- The Kirkwood Fund
- Dixie Kirsch Family Foundation Fund
- H. Kirsch Family Foundation Fund
- Ilse Klassen Fund
- Danny Knichel Memorial Scholarship Fund
- Sunny and Bonnie Knickerbocker Fund
- John S. and James L. Knight Foundation Fund
- Abby Gelles Knott Fund
- Robert P. Koch Memorial Scholarship Fund
- Mariner Sands Chapel Fund
- C. Charles Marran Charitable Fund
- Marie Graber Martens Fund
- Michael Flagler Matthews Sports Education Fund
- William Morrison Matthews Fund
- Jordan Camino Evert McCracken Memorial Fund
- Michelle McGann Fund
- Thomas Ladue McGinty Memorial Environmental Fund
- Allan J. McIntosh Fund
- George and Arlene F. Lepeska Scholarship Fund
- Lottie French Lewis Fund
- Stefanie Liberti Memorial Scholarship Fund
- Marcelle Hull Littell Loblolly Scholarship Fund
- Lorenzini Family Fund
- Inez Peppers Lovett and Charlie Ellington Scholarship Fund
- LSP Educational Scholarship Fund
- Paul L. MacAnaney Memorial Scholarship Fund
- MacArthur Foundation Housing Initiative
- John D. and Catherine T. MacArthur Fund
- The Macfarland Philanthropic Fund\*
- Honorable Eva W. Mack, First Black Mayor of West Palm Beach, Scholarship 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
- The Murray Family Fund\*
- John T. Murray, M.D. Children's Health Fund
- Jon M. Napierkowski Memorial Scholarship Fund
- Mabry M. Noxon Scholarship Fund
- Phillip D. O'Connell, Sr. Memorial Scholarship Fund
- Perry-Belle and Phillip D. O'Connell Pioneer 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
- Daniel J. Mahoney, Jr. Fund
- Mickey Mandelblatt Memorial Scholarship Fund
- Mariner Sands Chapel Fund
- C. Charles Marran Charitable Fund
- Marie Graber Martens Fund
- Michael Flagler Matthews Sports Education Fund
- William Morrison Matthews Fund
- Jordan Camino Evert McCracken Memorial Fund
- Michelle McGann Fund
- Thomas Ladue McGinty Memorial Environmental Fund
- Allan J. McIntosh Fund

- Olivia Foundation Fund
- Nan Ourisman Fund
- Denise Lynne Padgett Scholarship Fund
- PBC Society of Plastic & Reconstructive Surgeons, Inc. Scholarship Fund
- Palm Beach Chamber of Commerce Business Scholarship Fund
- Palm Beach Kennel Club Scholarship Fund
- Palm Beach Newspapers Scholarship Fund
- The Paradise Fund
- Parmet Fund
- Stephen Madry Peck, Jr. Memorial Scholarship Fund
- Peggy Adams/Animal Rescue League Endowment Fund\*
- Anna Marie Peterson Fund
- Mary and Robert Pew Public Education Fund
- Betty S. Price Fund
- Colonel Karl V. Price Lake Worth Community High School Air Force Jr. ROTC Scholarship Fund
- The Nick Price Fund
- The Reuter Scholarship Fund
- Ritter Family Fund\*
- Gwen Baker Rodgers Memorial Fund
- Marion Rossiter-Smith Fund
- Sadler/Hull Donor Advised Fund
- Safety Net Fund
- Lawrence A. Sanders Fund to Promote Literacy
- Lawrence A. Sanders Scholarship Fund for Creative Writing
- Kim Love Sartory Scholarship Fund
- Theodore Satter Memorial Scholarship Fund
- Leah G. Schad Memorial Scholarship Fund
- Charles and Catherine Squire, Sanders & Dempsey L.L.P.
- 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 Family Fund of the Community Foundation for Southeast Michigan
- Charles T. and Patricia Carry Stewart Fund
- Stiller Family Foundation Fund
- St. Mary's Extended Education 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
- Ted Trimble Scholarship Fund for Vocational Training
- Trimble Scholarship for Martin County Fund
- Toppel Family Fund

We understand the valuable role an advisor plays in a donor's charitable giving, and that's why we partner with a regional network of accomplished professionals with expertise in tax law, estate planning, accounting, wealth management, and financial planning.

## Benefits of working with the Community Foundation:

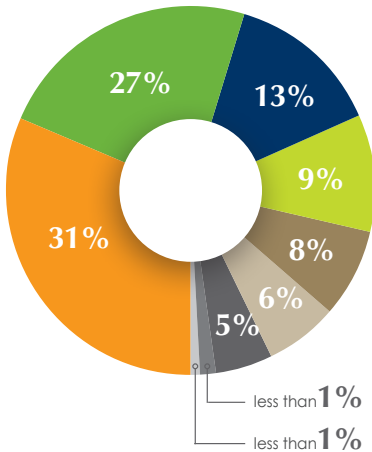
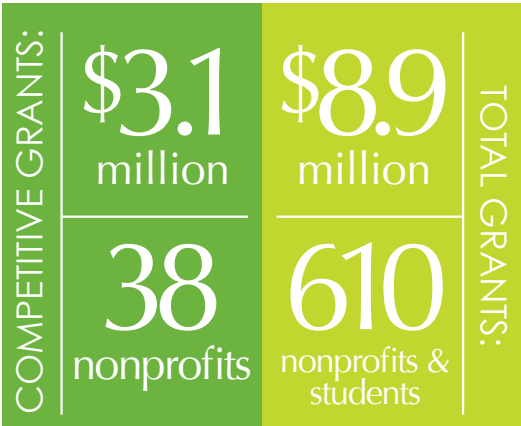
- We offer you guidance on strategies to support a client's charitable goals.
- We provide you with a resource to educate your clients about community needs.
- We offer your clients an efficient way to centralize their charitable giving and recommend grants to nonprofit organizations.
- We offer you a vehicle for your clients to gift different types of charitable assets in addition to cash.

Check out the Advisor Resources section on our website. We have a complete tax update service for CPAs, attorneys, CLUs, ChFCs and trust officers. Call Danielle Cameron at 561.340.4503 for more information.



# STRENGTHENING Nonprofits

The Community Foundation is one of the largest grantmakers in the region. 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. The funding priorities for this year's competitive grants included affordable housing, arts and culture, the environment and hunger.



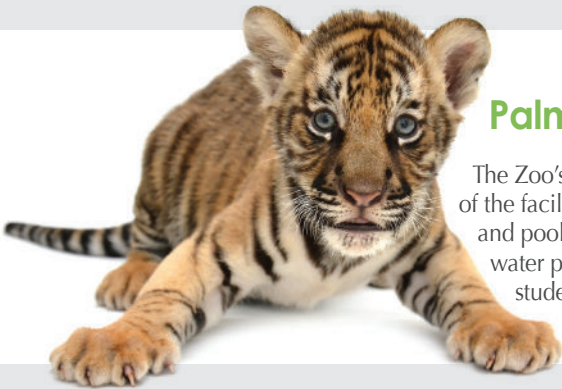
### Grants By Area

Health & Human Services Services	\$2,727,705 (193)
Education	\$2,449,339 (141)
Community & Economic Development	\$1,190,107 (40)
Arts & Culture	\$803,300 (46)
Scholarship	\$730,500 (83)
Religious	\$517,454 (64)
Environment	\$440,450 (31)
Human Race Relations	\$35,000 (5)
Animal Welfare	\$7,514 (7)
less than 1%	
less than 1%	

## 2013/2014 Grant Highlights

### Aid to Victims of Domestic Abuse (AVDA) \$105,771

The Casa Vegso residential program in Delray Beach provides emergency shelter and transitional housing for victims of domestic abuse and their children. The grant will provide funding for occupancy, rehabilitation and preservation of the 32-bed facility.



### Palm Beach Zoo \$165,000

The Zoo's Water Conservation Project has two parts. First, the grant will fund the replacement of three of the facility's water pumps that service many of the animal exhibits' water features such as waterfalls and pools. This will reduce the ecological load on the aquifer by saving over one million gallons of water per year. The second part of the grant will help use this project as a teaching model for K-12 students at the nearby Renaissance Charter School at Summit.

### Education Foundation of Martin County \$55,000

The Rio Creative Placemaking project is an Art in Public Places partnership between the Education Foundation, Martin County Board of County Commission and the Martin County School District. The funding will bring an artist-in-residence to Felix A. Williams Elementary School and Anderson Middle School to teach students the ancient art of making mosaics and provide art history lessons. The students will then help design mosaic benches that will be installed with bike racks throughout the Rio community, making the neighborhood more pedestrian-friendly.



## 2013/2014 Community Impact Grants Total: \$2,793,669

### Affordable Housing

\$1,680,753

Adopt-A-Family of the Palm Beaches, Inc.	\$205,000
Aid to Victims of Domestic Abuse, Inc.	\$105,771
Community Land Trust of Palm Beach County, Inc.	\$50,000
Community Partners Group	\$217,000
H.A.C.E.R. Ministry Group	\$55,000
Habitat for Humanity of Martin County, Inc.	\$35,500
Indiantown Non-Profit Housing, Inc.	\$122,914
Legal Aid Society of Palm Beach County, Inc.	\$119,100
Neighborhood Renaissance, Inc.	\$119,100
Pathways to Prosperity, Inc.	\$10,000
Place of Hope	\$216,368
The ARC of Martin County	\$125,000
The Lord's Place, Inc.	\$255,000
The Salvation Army of Martin County	\$45,000
Funded by MacArthur Foundation Housing Initiative	

### Arts & Culture

\$642,216

Boys & Girls Clubs of Martin County	\$60,216
Education Foundation of Martin County	\$55,000
Flamingo Clay Studio, Inc.	\$51,000
Glades Historical Society, Inc.	\$45,000
Palm Beach Opera, Inc.	\$134,400
Street Beat, Inc.	\$119,100
The Arts Council, Inc.	\$12,500
Young Singers of the Palm Beaches	\$165,000
Funded by John D. and Catherine T. MacArthur Fund	

### Environment

\$370,700

Florida Atlantic University Foundation, Inc.	\$25,000
Friends of MacArthur Beach State Park, Inc.	\$55,700
Palm Beach Atlantic University	\$50,000
South Florida Science Center & Aquarium	\$75,000
Zoological Society of the Palm Beaches	\$165,000

Funded by the Environmental Fund and John D. and Catherine T. MacArthur Fund

### Alleviate Hunger

\$100,000

Palm Beach County Food Bank	\$100,000
-----------------------------	-----------

Funded by the Community Impact Fund; Sheldon B. Ackerman Fund; Robert A. Butler Estate and Dr. Richard H. Butler Fund; Julian and Eunice S. Cohen Fund; Mary D. Fisher Fund; Marcelle Hull Littell Fund; Alfred and Elizabeth Kay Memorial Fund; Daniel J. Mahoney, Jr. Fund; C. Charles Marran Charitable Fund; and the Allan E. and Carol T. Shore Fund

"This was a particularly exciting year for our grantmaking.

Market improvements provided a greater return on our endowment, which is what we use for our competitive and responsive grant funding. This increase allowed us to focus on several areas of need in our community, instead of just one or two. We were also able to take some chances on a few unique, creative projects that have the potential to really impact the community in a positive way."

DEBBIE PUCILLO, outgoing board chair



## Offering much needed **SCHOLARSHIPS** to deserving students is a wonderful expression of philanthropy.

The Community Foundation has nearly 100 scholarship funds established by donors who are committed to education, and often named in the memory of a loved one. The organization has awarded \$7.5 million in scholarship grants since 1983, and helped 1,700 students, making it one of the largest providers of scholarships in the two counties. Students are evaluated by an advisory committee of board members and community volunteers based on a written application, test scores, grade transcripts and interviews.



### Preparing for College

As part of our scholarship program, we offer a financial literacy workshop for recipients and their parents. Sponsored by Citi Foundation and led by Clearpoint Credit Counseling Solutions, the goal of the session is to teach the importance of financial management.

*Imai and Latoy Campbell,  
Angeline Saint Fleur*



### Donor Spotlight

Edward T. Bedford was born in Brooklyn, NY in 1849. Edward worked initially as a salesman for Charles Pratt & Co., selling lubricating and heating oils.

Through collaboration with his friend, Robert Chesebrough, he helped develop and market the petroleum byproduct now more commonly known as Vaseline. Edward was a personal friend of John D. Rockefeller and his business acumen was highly regarded. The Bedford Foundation was established by Edward's grandson and Palm Beach resident, E. T. Bedford Davie. The Foundation started a scholarship fund at the Community Foundation in 2009 to help students in Palm Beach County.



*The Bedford Foundation is very involved in the selection process each year, and recently held an awards ceremony at the Center for Philanthropy for the eight winning high school graduates who each received \$10,000 scholarships over four years.*

## TRANSFORMING Education Funding Update

In 2012/2013, the Community Foundation made the largest grant in its history -- \$661,203 over two years to support a collaborative program between the School District of Palm Beach County and the University of Florida. The goal is to build a "best-in-class" educational program in the vital STEM subject areas of science, technology, engineering and math. Our funding was combined with grants from the Mary and Robert Pew Public Education Fund and Quantum Foundation, to provide \$1 million for the STEM initiative's rollout.

### Year 1 successes:



**The STEM Education Council**, a cohesive group of community leaders and school district personnel, has been organized and is working cooperatively to enhance STEM education in Palm Beach County.

**392 new Palm Beach County mathematics and science teachers** have received

2,166 hours of ongoing, personalized, online, subject- and grade-specific support from content experts and instructional coaches within the STEM TIPS component of the initiative.



**Palm Beach teachers filled 35 of the training slots to**

attend the 2013 CPET Summer Science Institutes this year, where they worked directly with science researchers at the University of Florida in Gainesville.



**16 science and math teachers** enrolled in the first STEM Graduate Course, Guided Teacher Inquiry.



**19 district and area staff have already earned their certification in the Certified Instructional Coaching**

training sessions and up to 31 teachers spread across 23 elementary schools, 2 high schools, and 5 middle schools are currently on track to earn this certification.



**6 different content clinics (with 6 follow-up sessions) have been held within the County.**

This has impacted 133 teachers who have received over 2,000 hours of professional development. The content clinics provide just-in-time, in-field support to veteran teachers and have immediate impact on students.



Palm Beach County students and teachers have made the district one of the **most active Algebra Nation partner districts** in Florida, with **65 schools** and **400 teachers** utilizing the site. Algebra teachers have ordered **16,000 workbooks** for use by their students.



**15 Palm Beach County science teachers are earning a Master of Arts in Education degree** in Science and Environmental Education while implementing a new, inquiry-based curriculum in area middle schools.

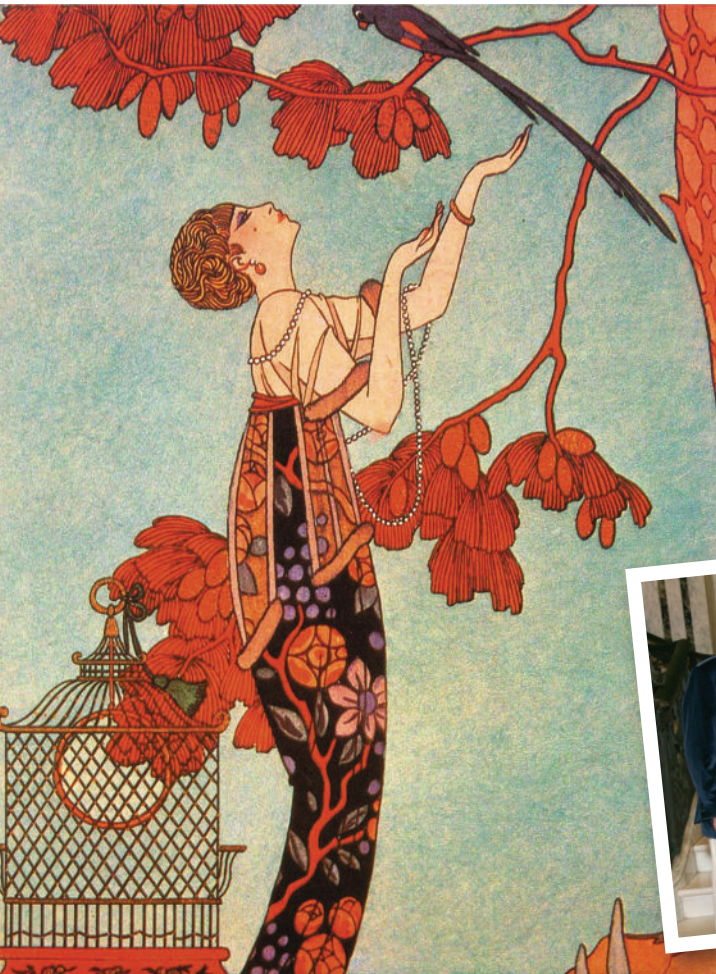
"This bold initiative will position the Palm Beach County school system as a national leader in recruiting, retaining and developing highly effective teachers and boosting students' achievement."

GLENN GOOD, UF Education Dean





# SPECIAL Events



## Gatsby Gala Dazzles

More than 150 guests dressed in feathers, fringe and fedoras and enjoyed an evening of glitz, glamour and grand entertainment at The Great Gatsby Gala on January 23 at The Flagler Museum. The event featured cocktails in the Grand Hall followed by dinner and dancing to the 12-piece Bob Hardwick Sound in the West Room. Christina and Benjamin Macfarland, III and Angela and Douglas Stockham were the event's honorary chairs; Debra and Anson Beard, Jr., Carol and Peter Matwiczkyk, and Tara Kelleher and Roy Zuckerberg served as the 2014 chairs. All proceeds from the Roaring Twenties-inspired dinner dance benefited the Community Foundation's leadership work and its mission to connect philanthropists to important issues and causes.



Gala co-chairs  
Anson and Debra Beard;  
Peter and Carol Matwiczkyk;  
Tara Kelleher and  
Roy Zuckerberg



## FOUNDER'S A W A R D Inaugural Luncheon

## Great Give Raises \$2.2 Million for Local Nonprofits

More than \$2.2 million was raised in a single day for 330 local nonprofits during the first-ever Great Give Palm Beach and Martin Counties. The 24-hour online fundraising event held on May 6 was hosted by the Community Foundation, United Way of Palm Beach County, Martin County Community Foundation and United Way of Martin County. The final total includes the money raised through online donations that day, as well as additional funds raised by the nonprofits through match challenges and checks that were not contributed via the website. It also includes close to \$460,000 in bonus funds raised by the Community Foundation that was divided and awarded to every participating nonprofit based on the total they raised. Nearly 100 community foundations across the country participated in the giving event in partnership with Give Local America, and collectively raised \$53 million in one day.



One Day  
One Community  
One Way to GIVE



## 2014 Great Give Highlights: \$53 Million National total raised on May 6

**\$2.2 Million**  
Total raised during  
inaugural Great Give

**\$458,000**  
Bonus pool funds  
awarded to all  
participating  
nonprofits

**330**  
Number of participat-  
ing nonprofits in Palm  
Beach and Martin  
counties

**7,400**  
Total number of  
online gifts made

**4 Million**  
Social media  
reached

**43**  
Number of  
contributing  
states

## First-Ever Founder's Award Celebrates Philanthropy in our Community

Nearly 550 guests attended our inaugural Founder's Award Luncheon at the Kravis Center on June 4. It was truly a celebration of philanthropy as we honored Marjorie S. Fisher and her daughter, Julie Fisher Cummings for their dedication to children and families in our community and around the world. Our founder, Winsome McIntosh provided the keynote address and presented our first-ever award. Stacy Palmer, editor of *The Chronicle of Philanthropy*, served as Master of Ceremonies.



J.B. Murray; Winsome McIntosh; Stacy Palmer;  
Rudy Schupp; Julie Fisher Cummings; Brad Hurlburt;  
and Debbie Pucillo.



# FINANCIAL Overview

The goal of the Community Foundation for Palm Beach and Martin Counties is to ensure that the charitable dollars entrusted to us are available to the community forever.

Through prudent stewardship of our assets, we strive to maximize available grant dollars while ensuring that we serve as a permanent philanthropic resource for our region.

The responsibility for managing the Foundation's investment portfolio is vested in our board of directors through its Investment Committee. This committee works closely with staff and the independent consulting firm Prime Buchholz & Associates, to establish investment policy, implement asset allocation, set benchmarks and monitor the individual investment managers and their performance on a quarterly basis. The use of a 5% spending policy ensures our charitable funds are protected for the future while having the most impact today.

The board also has an Audit Committee that works with the Foundation's management and staff to ensure rigorous financial controls and high administrative standards. We work closely with our independent auditors, Holyfield & Thomas, LLC to meet our objectives.

## Statement of Financial Position as of June 30

Assets	2014	2013
Cash and Cash Equivalents	3,473,215	2,863,597
Contributions and Bequest Receivable	497,368	3,000,000
Prepaid Expenses and Other Assets	319,934	295,312
Investments	157,325,140	136,487,947
Land, Building and Equipment, Net	8,332,100	8,547,910
<b>Total Assets</b>	<b>169,947,757</b>	<b>151,194,766</b>
<b>Liabilities and Net Assets</b>		
Accounts Payable and Accrued Expenses	814,357	743,619
Grants and Scholarships Payable-current portion	7,114,479	4,814,626
Interest Rate Swap	207,549	601,385
Bond Issue Payable	10,900,000	10,900,000
<b>Total Liabilities</b>	<b>19,036,385</b>	<b>17,059,630</b>
<b>Net Assets</b>	<b>150,911,372</b>	<b>134,135,136</b>
<b>Total Liabilities and Net Assets</b>	<b>169,947,757</b>	<b>151,194,766</b>

## Statement of Activity as of June 30

Revenues	2014	2013
Contributions, Grants and Pledges	5,558,234	7,838,082
Investment Income	22,315,800	11,730,484
Rental and Other Income	269,787	238,075
Other Gain (Loss)	393,836	363,939
<b>Total Revenues</b>	<b>28,537,657</b>	<b>20,170,580</b>
<b>Expenses</b>		
Grants, Net of Cancellations and Returns	8,801,662	6,350,098
Programs and Support Services	2,959,759	2,969,051
Total Grants, Programs and Support Services	11,761,421	9,319,149
<b>Change in Net Assets</b>	<b>16,776,236</b>	<b>10,851,431</b>
<b>Net Assets at Beginning of Year</b>	<b>134,135,136</b>	<b>123,283,705</b>
<b>Net Assets at End of Year</b>	<b>150,911,372</b>	<b>134,135,136</b>

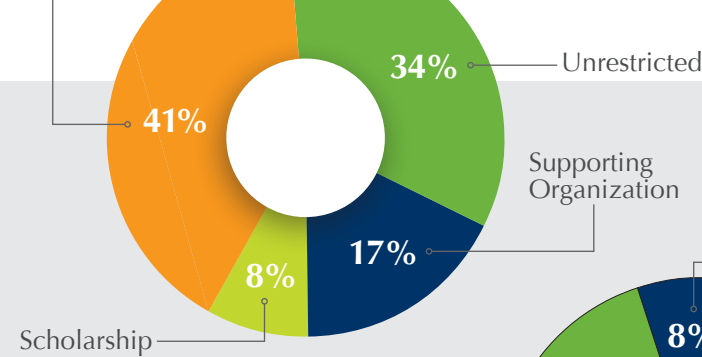
## Investments as of 6/30/14

Asset	Long-Term Asset Allocation (%)	Current Allocation (%)
Global Public Equity	30.0%	34.8%
Global Private Equity	10.0%	8.5%
Flexible Capital	30.0%	28.7%
Inflation Hedging	20.0%	20.1%
Fixed Income	8.0%	7.3%
Liquid Capital	2.0%	0.7%

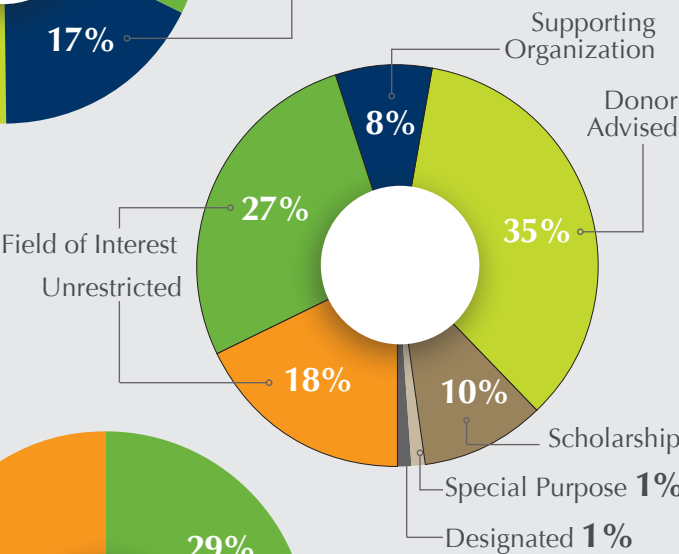
## Investments Performance as of 6/30/14

	Foundation	Policy Index
1 Yr	15.7%	14.5%
3 Yr	7.9%	6.7%
5 Yr	10.3%	9.2%
10 Yr	6.4%	5.7%
Since Inception	7.7%	7.2%

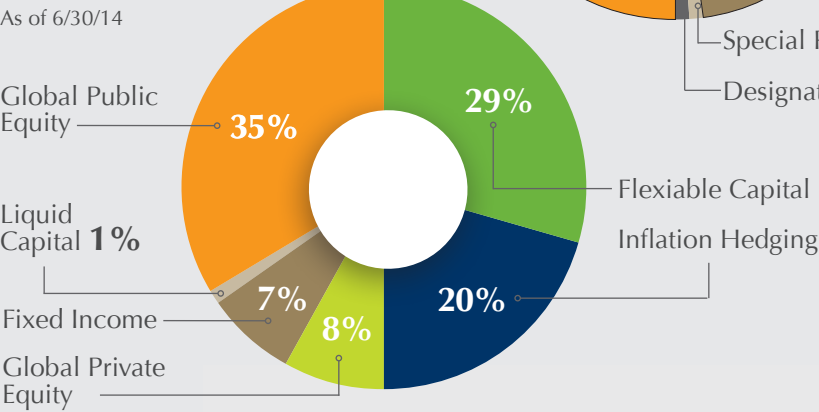
## Grants by Fund Type as of June 30



## Assets by Fund Type as of June 30

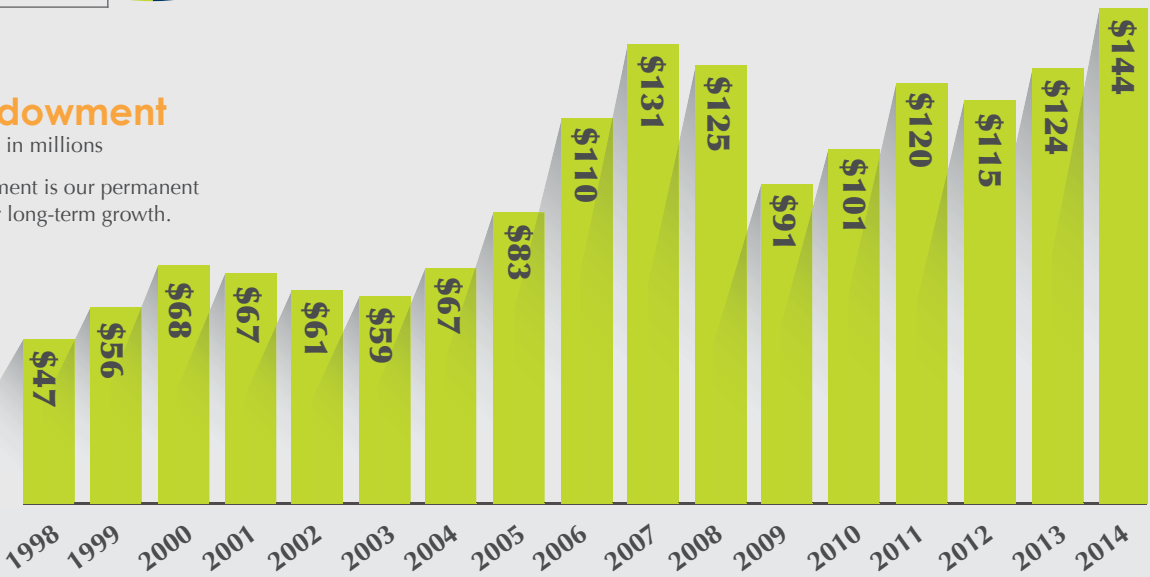


## Current Asset Allocation As of 6/30/14



## Growth of Endowment as of June 30 | figures are in millions

The Foundation's endowment is our permanent pool of funds invested for long-term growth.



Our donors have the option of selecting from a variety of investment options:

- Permanent Pool**  
Invested for long-term growth and appreciation across multiple investment managers.
- Intermediate Pool**  
Invested to meet the needs of funds with one- to three-year grantmaking goals.
- Short Term Pool**  
Invested to meet the needs of funds with less than one-year grantmaking goals.
- Independently Managed**  
Customized investment option where advisors can manage and invest charitable assets on behalf of the donor.





J.B. Murray  
Chair



Deborah Dale Pucillo  
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++(Deceased)

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# Ways to Give

## The types of funds we offer:

- **Donor Advised Fund:** Donors make grant recommendations to charities of their choice; we vet the nonprofits, write the checks and handle the reporting.
- **Community Impact Fund:** For visionary donors who want their philanthropy to continue after their lifetime and want their gift to meet the needs of generations to come. Our team of experts will make annual grants to address community issues.
- **Field of Interest Fund:** For donors who have a particular area of charitable interest. They name the area, and then we go to work researching and preparing a grant spending plan in that field.
- **Designated Fund:** For donors firmly committed to supporting specific charities. The donor names the charity or charities they'd like to benefit; we take care of the investments and regularly make grants to the charities named.
- **Scholarship Fund:** For donors who want to help local students achieve the dream of a college education; these funds often memorialize a loved one.
- **Agency Endowment Fund:** A fund managed by the Foundation on behalf of a local nonprofit. The nonprofit receives annual distributions for unrestricted use and a permanent source of income.

## Other ways to give:

- **Deferred Gift:** Donors can set up a fund through a deferred-giving arrangement. A key feature of many estate plans is a tax advantage to the donor now for the commitment of a charitable gift later.
- **Bequest:** After providing for personal bequests, donors may include provisions for setting up a fund or add to one already established. They may pay lower estate taxes while ensuring that the charitable work they care about is carried on.
- **Annual Support:** Donations to the Community Foundation strengthens our ability to tackle critical issues, develop solutions and provide services to the people and organizations in our community.





*"The true meaning  
of life is to plant  
trees, under whose  
shade you do not  
expect to sit."*

- Nelson Henderson



Your Philanthropy  
Our Community  
Better Together

office 561.659.6800 fax 561.832.6542  
700 South Dixie Highway, Suite 200  
West Palm Beach, FL 33401  
web [yourcommunityfoundation.org](http://yourcommunityfoundation.org)  
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