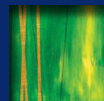
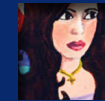


THE POWER OF

GIVING FORWARD

2021 Annual Report To The Community



THE COMMUNITY
FOUNDATION
FOR NORTHEAST FLORIDA

www.jaxcf.org



We start with an idea — a donor's vision, a nonprofit's need, a community imperative. Through tireless collaboration behind the scenes, we work to bridge the gap between noble idea and great execution. The result? Programs and projects built on the compounding efforts of passionate people in our community.



That's the Power of
GIVING FORWARD.

See the art installation and this metaphor come to life by flipping the page edges front to back.

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An idea sparks...

Letter from the President & Chair



Nina M. Waters
President

It's fair to say that 2021 tested us, and not just with nasal swabs and COVID. Figuring out how to move forward with so much uncertainty was akin to tiptoeing through a minefield. Important issues in our community demanded our attention every day, and we couldn't shut ourselves off in hopes that the outlook for the next week/month/year would be better. Instead, we responded daily to the urgency from both fundholders and nonprofit organizations, while calculating risks and devising alternatives for extenuating circumstances.



Martha Frye Baker
Chair

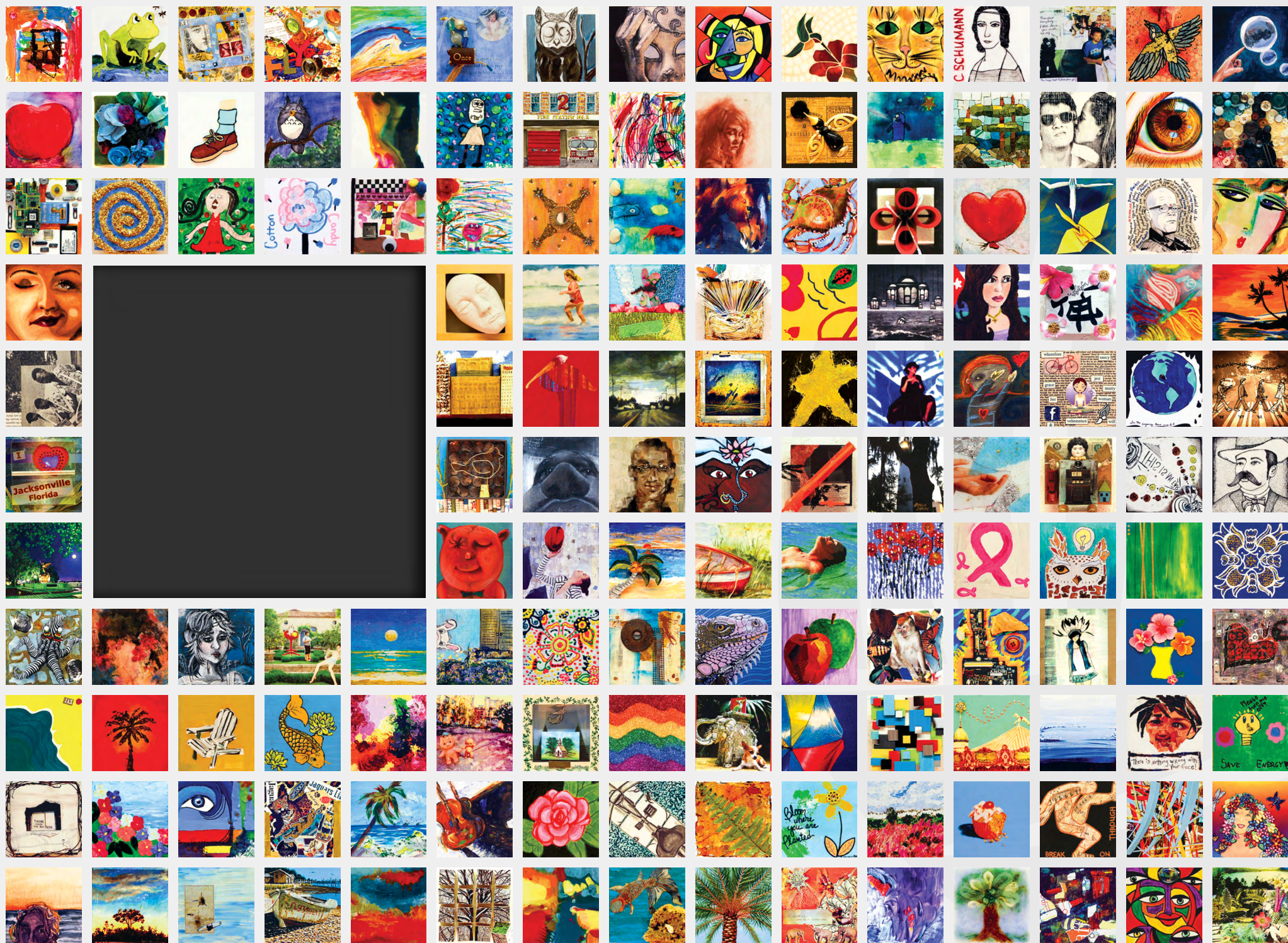
Which is why it is heartening to see that we did much more than survive in 2021—we moved ahead on many fronts, and positioned ourselves for the days ahead. In partnership with our donors, we granted \$42 million, 78% of which stayed in Northeast Florida. Our foundation grew, too—thanks to \$63 million in new gifts and strong investment returns, we ended the year with \$630 million in total assets. We also added two staff positions to ensure our ability to deliver the service that earned us the community foundation field's highest overall satisfaction* with the Foundation and staff responsiveness.

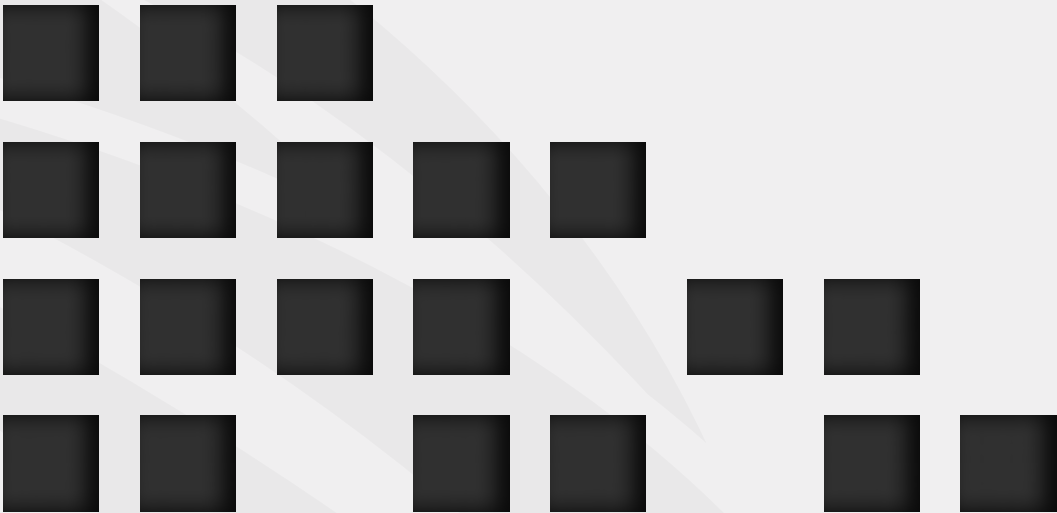
We also finished our Strategic Plan that will take us through 2025. It expands on our tradition of donor stewardship and investment in the nonprofit community, and it calls for a more public and powerful commitment to civic leadership, which we embrace. We are determined to grow the assets needed to have even more impact on our region. We've opened up new avenues in our financial portfolio to be able to respond with patient capital beyond traditional grantmaking. And we are eager to explore new partnerships with other funders and community stakeholders to bring collaborative approaches to tackling persistent issues.

2021 was a reminder that everything we are able to do—make grants, tackle issues, convene groups, employ professionals—is because some generous person, family or organization made a decision to open a fund here at some previous point in time. Their generosity and foresight provide ongoing resources which we then deploy for the improvement of our community and all who live here. We're deeply grateful for the astuteness of our fundholders—their actions surely illustrate the power of Giving Forward.

Nina M. Waters

Martha Frye Baker





“It’s an exemplary example of what creative collaboration can accomplish.”

Doug Eng, Photographer, Installation Artist & 2021 Ann McDonald Baker Art Ventures Award Recipient

Imagination Squared was envisioned and created by artists Dolf James and Christina Foard. They asked photographer Doug Eng to document the process of bringing together the hundreds of individual squares contributed by the community, including the public debut at the Museum of Contemporary Art. Today, **Imagination Squared** is permanently installed at the Jacksonville Public Library. A sampling of the art squares can be seen to the left and sprinkled throughout. Eng’s photographs are featured along the right edges of each spread and back cover.



Imagination Squared is more than an art installation — it’s the culmination of community members working together to transform 910 single 5x5-inch wooden squares into a unified work with staying power. In 2010, these wooden squares were carefully curated into a ‘three-dimensional canvas of individual contributions, weaved into a tapestry of color, texture, forms and contrast.’ The outcome is far more powerful than the individual contributions — and that only happens through teamwork.

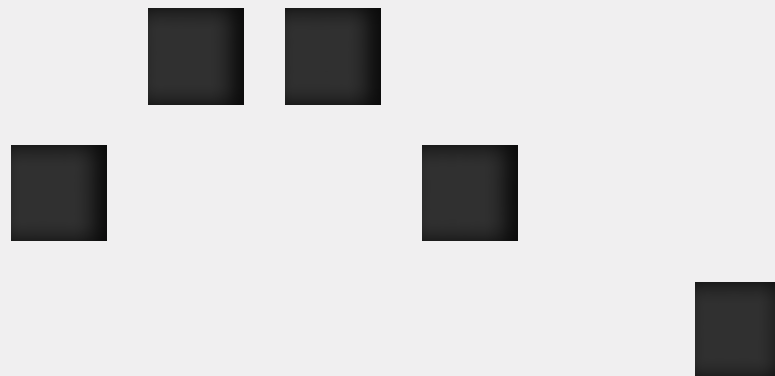
THIS BREATHTAKING CREATION IS ALSO AN EXCELLENT METAPHOR FOR HOW THE COMMUNITY FOUNDATION OPERATES IN THE COUNTIES WE SERVE:

We start with an idea — a donor’s vision, a nonprofit’s need, a community imperative. Through tireless collaboration behind the scenes, we work to bridge the gap between noble idea and great execution. The result? Programs and projects built on the compounding efforts of passionate people in our community.



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Nina M. Waters

Martha Frye Baker



*Our Mission: Stimulating Philanthropy to
Build a Better Community. That's what powers
GIVING FORWARD.*



Who We Are & What We Do

at The Community Foundation

The Community Foundation for Northeast Florida is a tax exempt public charity that connects people who care with causes that matter. Since 1964, we have served the citizens of Duval, St. Johns, Nassau, Baker, Clay, and more recently, Putnam counties through a range of charitable and civic activities, while helping individual donors achieve their financial and philanthropic goals through our products and services. Through this rich history and in partnership with the generous individuals and families who have chosen to establish funds here, we have channeled more than \$640 million in grants to deserving organizations. We believe in Giving Back | Giving Forward.

OUR VALUES

Grantmaking that is **fair** and **thoughtful**

Leadership that **trusts** and **respects** the intent of donors

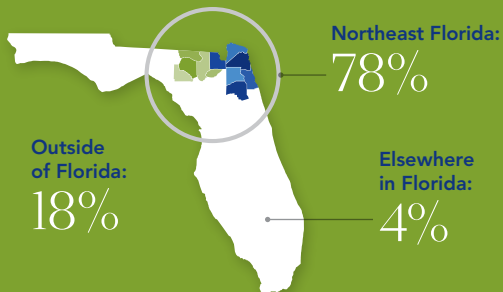
Service to community that is **innovative** and **creative**

Governance with **integrity** that puts community above self

Equity centered as a core strategy of the Foundation

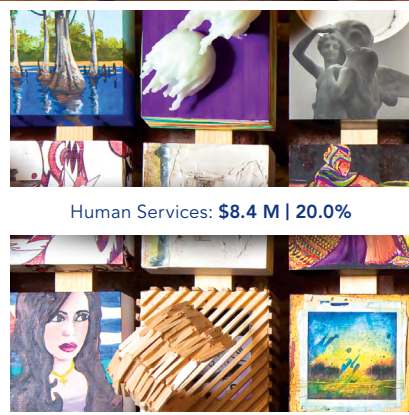


**THE COMMUNITY
FOUNDATION
FOR NORTHEAST FLORIDA**
Giving Back. Giving Forward.



SERVING NORTHEAST FLORIDA & BEYOND

We serve the citizens of Duval, Baker, Clay, Nassau, Putnam and St. Johns counties. We also serve Columbia, Hamilton, Lafayette, Union and Suwannee counties through our affiliate, the Suwannee Valley Community Foundation.



Human Services: \$8.4 M | 20.0%



Education: \$9.3 M | 22.1%



2021 GRANTS DISTRIBUTION BY FIELD

**Environmental &
Animal Protection:**
\$3.4 M | 8.1%



Civic & Community:
\$4.8 M | 11.4%



Religion:
\$3.4 M | 8.1%



**\$42.1
MILLION**

**Grants from
All Funds in 2021**

Public Support:
\$1.7 M | 4.0%

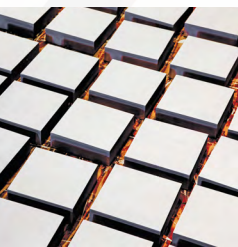


Arts & Culture:
\$4.5 M | 10.7%



Health: \$6.6 M | 15.7%

THE POWER OF



and multiplies...


FORWARD

Looking back at our

2021 Highlights


\$630.4
MILLION
Total Assets


660
Total Funds



47
New Funds

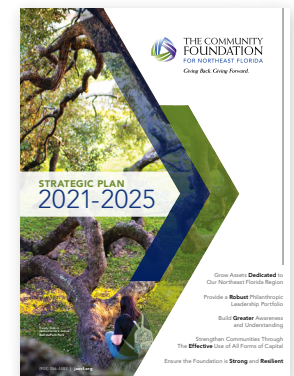

\$63.4
MILLION
New Gifts


\$42.1
MILLION
Grants Made


2,776
Number of Grants Made

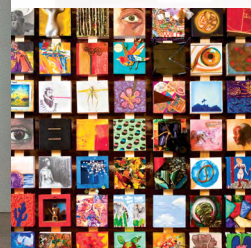

1,127
Grantees


78%
Northeast Florida Only Grants



WGA 20TH ANNIVERSARY

The Women's Giving Alliance, an initiative of The Community Foundation, celebrated its 20th anniversary in 2021. WGA was the brainchild of trustees Courtenay Wilson, Ann McDonald Baker, Dr. Doris Carson, Helen Lane, and Delores Barr Weaver. Together, this Mighty Five launched a collective giving effort that has raised and distributed more than \$7 million to support women & girls in NE Florida. Along the way, hundreds of women from every walk of life have contributed their gifts of heart, mind and wallet, and discovered the power of strategic philanthropy. *Below: Founder and Legacy member luncheon attendees.*

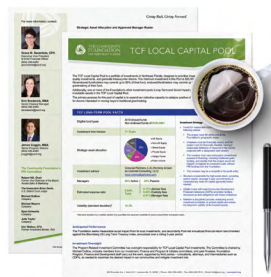


*individual
contributions
come alive...*

5-YEAR STRATEGIC PLAN

Although it was challenging to do during the pandemic, we continued our strategic planning process and completed a new Strategic Plan that will take us through 2025. Built on the longstanding mission to Stimulate Philanthropy to Build a Better Community, this updated framework calls for us to use our power as one of the community's philanthropic anchor institutions to be a greater force for good going forward, and to have the organizational strength to do that in perpetuity.

You can read our complete strategic plan on our website at bit.ly/TCFStrategicPlan, or scan the QR code to the left.



LOCAL CAPITAL POOL

In 2021, we introduced the TCF Local Capital Pool – a new way of investing in the community beyond traditional grantmaking. The TCF Local Capital Pool will provide 'patient' capital when it lends funds to organizations for a particular project with the expectation that the loan will be repaid over time, although likely at below-market rates. Our goal is to invest in nonprofit organizations and for-profit social enterprises that measurably improve access to affordable housing and equitably expand economic opportunity for marginalized residents of Northeast Florida. The TCF Local Capital Pool is an attractive choice for anyone who wants to take their philanthropy beyond traditional grantmaking. Learn more on page 13.



2021 Highlights *continued*



LGBTQ FILM FESTIVAL

The LGBTQ Community Fund for Northeast Florida hosted The Many Sides of Pride® Film Festival in June. Ten films were featured both virtually and at MOCA Jacksonville, our presenting partner. Programming



included presentations from filmmakers, panel discussions with members of Jacksonville's LGBTQ community and moderated post-film conversations. More than 500 registrants took part either in person or online.

BUILDING A BETTER NORMAL

Social distancing forced us to think differently about donor education opportunities. We banded together with four other community foundations in the nation to present a two-part speaker series: 'Building a Better Normal—Philanthropy's Role in Racial Equity and Shared Prosperity.' Our fundholders had private virtual presentations by the authors of *'The Upswing: How America Came Through a Century Ago and How We Can Do It Again'* (Robert Putnam and Shaylyn Romney Garrett) and *'The Sum of Us: What Racism Costs Everyone and How We Can Prosper Together'* (Heather McGhee). More than 600 donors from Jacksonville, Oregon, Atlanta, Houston and Central Indiana took part.



BUILDING A BETTER NORMAL

PHILANTHROPY'S ROLE in racial equity and shared prosperity

America is in the midst of a racial reckoning. As Americans, we are all in this together - we need to come together to think and act differently in order to effect real, lasting change for shared prosperity. We've partnered with four leading community foundations across the country for two conversations:

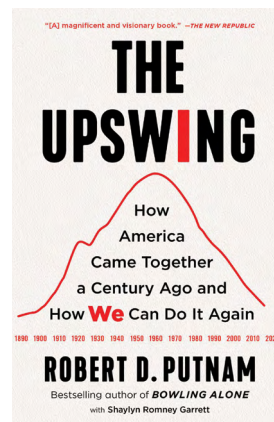
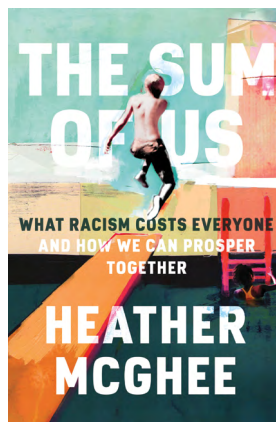


Photo by Laura Evans



ANN McDONALD BAKER ART VENTURES AWARD

Doug Eng, an award-winning photographer, installation artist and environmental advocate, received the Ann McDonald Baker Art Ventures Award in November. Martha Frye Baker, chair of The Community Foundation's Board of Trustees, made the announcement at MOCA Jacksonville, where Eng's retrospective 'Structure of Nature | Nature of Structure' was on exhibit. The Ann McDonald Baker award recognizes an artist whose work brings distinction to Northeast Florida, and it is accompanied by a \$10,000 unrestricted grant. Ann McDonald Baker chaired the Board and co-led the fundraising effort to create Art Ventures.



A JOURNEY IN DIVERSITY, EQUITY & INCLUSION

Our staff and Board have been on a learning journey for more than an year regarding Diversity, Equity and Inclusion (DEI). A staff working group meets regularly and in 2021, provided six learning opportunities for staff participation.



In December, the staff and Board took a tour of Jacksonville's historic Black neighborhoods and learned about the effects of structural racism in our community. Charlene Taylor Hill, retired executive director of the Jacksonville Human Rights Commission led our bus tour which took us to many iconic landmarks, including J.P. Small Park

in Durkeeville. Later, at the Ritz Theatre, we were joined by community leaders who talked about structural racism locally in criminal justice, education, health care, and housing.



\$1 MILLION TO AFGHAN REFUGEES

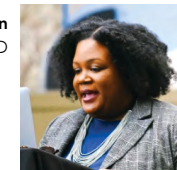
The heart-wrenching pictures of Afghan families trying to leave their country last summer prompted a major response by J. Wayne and Delores Barr Weaver and two subsequent generations of their family. The Weaver Family Five pledged \$1 million to help settle those incoming Afghan families in Northeast Florida, Catholic Charities and Lutheran Social Services each received a \$500,000 grant for this work.

RACE IN RETROSPECT

After raising the funds in 2020 for 904WARD to hire professional staff and to support its quest to implement a strategic plan, we commissioned a study of nearly 80 years of local research on education, health, housing, justice and the legal system, employment, media and politics, and civic engagement—and what it showed about racial disparity. This effort was built on earlier work done as part of Project Breakthrough: Changing the Story of Race in Jacksonville—an effort led by The Community Foundation, OneJax, the Jacksonville Human Rights Commission and the Aspen Institute Roundtable on Community Change beginning in 2006. We presented 904WARD with this comprehensive retrospective, and now 904WARD has created *Race in Retrospect*, a seven-part series, "to provide a baseline for our understanding of racial inequity in Jacksonville, past and present."



Dr. Kimberly Allen
CEO, 904WARD



through careful
consideration...

Investing in our



*Collaborating on the issues facing our community now.
That's what powers **GIVING FORWARD.***



NEIGHBORHOODS

Supporting neighborhoods continues as our key strategic initiative and we invest a significant portion of our Foundation-directed dollars in this area each year.

The goal is to maintain our focus on affordable housing and economic opportunity. Our strategy is to deliver meaningful support—financial and partnership—to the organizations in specific areas that are doing this work and building these communities.

Both LISC Jacksonville, a legacy investment we have supported for two decades, and LIFT JAX, which we helped launch in 2020, received a \$100,000 multi-year grant from us last year to support their work. And in 2021, we made a sizeable investment in the Black Business Investment Fund (see page 19) as well as individual grants to neighborhood community development organizations like Historic Eastside CDC, North Riverside CDC, and Northwest Jacksonville CDC. We also have a Small Organizations grants program that provides \$2,000 grants to new or small grassroots nonprofits with annual operating budgets of less than \$200,000. (See page 18, Mission of the Dirt Road.)

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THE POWER OF
GIVING



collaboration...

FORWARD





KEEPING IT ALL IN THE FAMILY



Imagine living in a home for decades, assuming you will continue to do so after the previous generation passes, only to find that your claim to the property is in question.

It's more common than you think—and thanks to a grant made to the North Riverside Community Development Corporation (NRCDC), homeowner panic in one neighborhood has turned into homeowner peace.

Linda Harris and Henry Scott discuss the effort to make sure Linda's home stays in her family. NRCDC President Shirley Thomas (right) led the group's successful work.





PRESERVING GENERATIONAL WEALTH



Take Linda Harris. She's lived in her Mixon Town house for decades, but when she became disabled, she couldn't continue as a hospital housekeeping supervisor, and she got behind in her property taxes.

"I was having to choose between paying the light bill and paying my taxes," she remembers.

A concerned neighbor urged Linda to attend a Homeowner's Workshop, where she learned about the legal consequences of unpaid property taxes and problems with clear title that could threaten her home and her ability to pass it to her daughter. The workshops are part of LISC Jacksonville's effort to preserve generational wealth—understanding that for most of us, our home is our largest asset, and the most important one to be able to hand down to our heirs.

LISC Jacksonville enlisted NRCDC President Shirley Thomas and Vice President Henry Scott to help spread the word that help was available to preserve and protect their homeownership status. Assisted by Padrica Mendez, Faye Green and Gail Shepard, they canvassed the neighborhood, and at first, it was an uphill battle.

"It was almost a year before we got folks to understand all we were trying to do is help," remembers Ms. Thomas, noting that North Riverside has had numerous instances where unscrupulous outsiders preyed on elderly residents.

Below: Bernice Griffin has been a resident of North Riverside for more than 50 years. She can rest easy in her favorite chair, now that her home's status has been secured.



But they didn't quit. With the help of Three Rivers Legal Services, a nonprofit that provides free civil legal support and financial counseling, issues were identified and solutions were outlined. Ms. Thomas and Mr. Scott made numerous trips to the Property Tax office on behalf of homeowners, and Three Rivers Legal Services looked at larger obstacles like making sure the homes' titles were clear.

"The #1 issue we find is folks tend to think that the law happens automatically," says Three Rivers staff attorney LaTonya Lipscomb Smith. She and Associate Managing Attorney Rachel Rall work closely with residents to address things like making sure the title is clear and the owner's will has been updated.

"They assume everything is in order for the home to pass from generation to generation, but probate law doesn't work that way. That's where we come in—we help with legal action you may need to preserve your home." Attorney LaTonya Lipscomb, Three Rivers

In some cases, residents weren't taking advantage of homestead exemption, which lowers property taxes. In other cases, residents were being denied homestead exemptions they could have qualified for if their legal status was clarified. There were burdensome penalties and fines associated with these issues.

But the North Riverside CDC persevered, and by the end of the grant period, the

volunteers had referred more than two dozen homeowners for legal help, and another dozen households were able to get property tax relief. The work was so meaningful to the volunteers that they donated their stipends back to the North Riverside CDC to invest in their community garden.

"I'm so grateful for their help," Linda says. *"They kept me informed all along the way. And the people at Three Rivers helped me make arrangements for my daughter to have my house when I'm gone."*

"Now I can sleep at night."

LISC JACKSONVILLE



and precision...



Did you know?



In the average U.S. metropolitan area, homes in neighborhoods where the share of the population is 50 percent Black are valued at roughly half the price as homes in neighborhoods with no Black residents.



50% LOWER HOME VALUES IN MAJORITY-BLACK NEIGHBORHOODS VS. THOSE WITH NONE

In a 2018 Brookings Metropolitan Policy Program study,

Jacksonville
is ranked 2nd

IN 'METROPOLITAN AREAS WITH THE MOST DEVALUATION OF HOMES IN BLACK NEIGHBORHOODS.

Metropolitan areas with greater devaluation of Black neighborhoods are more segregated and produce less upward mobility for the Black children who grow up in those communities.

“The undervaluation of housing in Black neighborhoods has important social implications. Black homeowners realize lower wealth accumulation, which makes it more difficult to start and invest in businesses and afford college tuition.



We Are Resilient
Raquel Benjamin
2021 Art Ventures grantee

BEYOND GRANTMAKING:

providing capital for greater impact

For some time, we have been exploring ways to support nonprofit organizations beyond traditional grantmaking. Many of them need access to loans and other financial instruments but they are not candidates for mainstream financial institutions. At the same time, some of our fundholders have asked for more options to invest their fund's assets into local enterprises rather than traditional portfolio holdings.

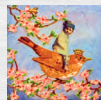
After much research, we created the TCF Local Capital Pool in 2021 to respond to both those needs. Its primary purpose is to expand the Foundation's capacity to catalyze positive change and is intended to attract new donors interested in moving beyond traditional grantmaking. It will invest in nonprofit organizations and for-profit social enterprises that measurably improve access to affordable housing and equitably expand economic opportunity for marginalized residents of Northeast Florida.

We seek to invest in projects that meet these criteria:

- 1 The project falls within **Northeast Florida**
- 2 The project is **financially sound** but has not been able to acquire traditional financing or other conventional resources
- 3 It **aligns** with the Foundation's grantmaking programmatic areas

Notably, the pool will initially invest in Community Development Financial Institutions (CDFI). CDFIs are private financial institutions that are 100% dedicated to delivering responsible, affordable lending to help low-income, low-wealth, and other disadvantaged people and communities join the economic mainstream. We anticipate investments will be in the form of debt (below market and likely subordinate), equity or loan guarantees.

To learn more about the TCF Local Capital Pool, please contact Grace Sacerdote, CPA and Executive Vice President at gsacerdote@jaxcf.org.



For more information, contact:

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Senior Program Director
(904) 356-4483
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The Community Foundation's PRI Committee:

Robert Hill, Chair
Former Vice Chairman of the Board, Acosta Sales & Marketing

The Honorable Brian Davis
U.S. District Court Judge

Michael DuBow
Company

Michael Meyers
Company

Ryan Schwartz
Company

Julia Taylor
Company

Dori Walton, CFA
Former Investment Banker, ING

Giving Back. Giving Forward.

Strategic Asset Allocation and Approved Manager Roster

THE COMMUNITY FOUNDATION FOR NORTHEAST FLORIDA TCF LOCAL CAPITAL POOL

The TCF Local Capital Pool is a portfolio of investments in Northeast Florida, designed to prioritize impact quality investments, and generate treasury-like returns. The minimum investment in this Pool is \$25,000. Nonendowed fundholders may commit up to 95% of their fund, endowed fundholders may commit up to grantmaking of their fund.

Additionally, one or more of the Foundation's other investment pools (Long-Term and Social Impact) investable assets in the TCF Local Capital Pool.

The primary purpose for this pool of capital is to expand our collective capacity to catalyze positive change for donors interested in moving beyond traditional grantmaking.

TCF LONG-TERM POOL FACTS

Eligible fund types	All Endowed funds Non-endowed funds of \$100,000+	
Investment time horizon	7+ Years	
Strategic asset allocation		
Investment advisor	Crescent Partners, LLC (formerly known as Colonial Consulting, LLC) www.crescentpartners.com	
Managers	80% Active	20% Passive
Estimated expense ratio	0.94% Total	0.11% Advisor fees 0.02% Custody fees 0.81% Manager fees
Volatility (standard deviation)*	16.3%	

*Standard deviation is a volatility statistic that quantifies the expected variability of returns around their anticipated mean.

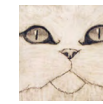
Anticipated Performance
The Foundation seeks measurable social impact from its local investments, and secondarily Pool net annualized financial return benchmarked against the Bloomberg US Long Term Treasury Index, annualized over a rolling 5-year period.

Investment Oversight
The Program Related Investment Committee has oversight responsibility for TCF Local Capital Pool investments. The Committee is chaired by Michael DuBow, includes members from our Investment, Finance and Program & Initiatives committees, and past-Trustees. Foundation Program, Finance and Development staff carry out the work, supported by third parties – consultants, attorneys, and intermediaries such as CDFIs, as needed to maximize the desired impact in our communities and mitigate investment risk.

245 Riverside Ave | Suite 310 | Jacksonville, FL 32202 | Phone: (904) 356-4483 | Fax: (904) 356-7910 | Email: info@jaxcf.org | www.jaxcf.org

“Whether it’s providing capital to grow small businesses in underserved neighborhoods or financing the construction of affordable homes for families that desperately need them, we are committed to placing investments with organizations that we know can improve the quality of life for Northeast Florida residents.”

James Coggin, MBA, Senior Program Director



Shining a Light on the **AFFORDABLE HOUSING CRISIS**

Affordable housing in Northeast Florida is a critical issue. Lack of supply of both rental properties and homes for purchase, coupled with soaring prices, have escalated to a point of crisis for teachers, restaurant workers, bus drivers, store clerks and others on whom our economy depends.



As Northeast Florida's largest foundation*, we are committed to providing opportunities for others to learn about pressing issues like the lack of affordable housing. Decades ago, we created the Donors Forum of Northeast Florida to bring together individual philanthropists, and private and family foundations to explore important issues and share knowledge.

After pausing for COVID for almost two years, we hosted our first in-person Donors Forum in November so that we could elevate the topic of affordable housing. James Coggin, the Foundation's Senior Program Director, leads our work that supports our key strategic objective of Supporting Neighborhoods. He framed the issue for attendees, then moderated a panel with executives from four of the leading nonprofit agencies working toward solutions. Funders were able to ask direct questions about programs and potential investment opportunities.

The Donors Forum of Northeast Florida is supported by the Lucy Gooding Charitable Foundation Trust.

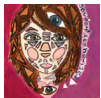
For more, go to www.jaxcf.org/learn/donors-forum.



Above, left to right: Dr. Irvin "PeDro" Cohen, LISC Jacksonville; Shannon Nazworth, Ability Housing; Bill Lazar, St. Johns Housing Partnership; James Coggin; Paul Tutwiler, NW Jacksonville CDC.

*“Owning a home is not simply a form of housing,
it is an investment in future equity.”*

Paul Tutwiler, Executive Director, Northwest Jacksonville CDC





TINY HOUSES | BIG HEARTS

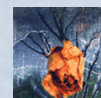
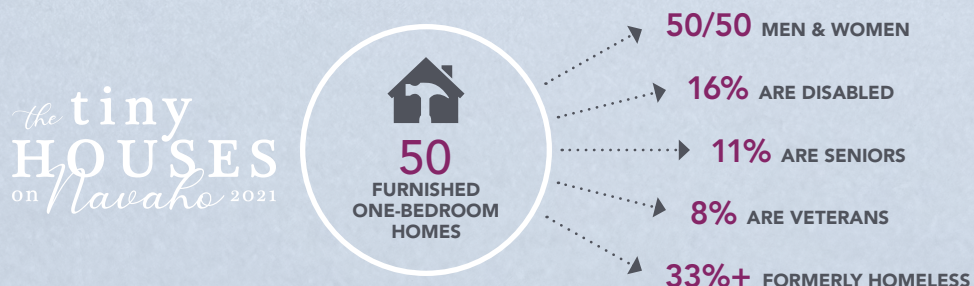
THERE ARE FIFTY, AFFORDABLE RENTAL TINY HOMES IN THE LACKAWANNA SECTION OF JACKSONVILLE TODAY THAT WEREN'T THERE A YEAR AGO, THANKS TO THE VISION OF DELORES BARR WEAVER.

Several years ago, she had an idea that one possible solution to affordable rental housing was a tiny home community. Her deep relationship with HabiJax resulted in a leap of faith between donor and grantee, and in the fall of 2021, the Tiny Houses on Navaho opened. Fifty furnished one-bedroom homes, centered around courtyards, are all occupied.

Currently, about half the residents are men, and half are women—almost all are living in single occupancy. Sixteen percent of the residents identify as disabled, while 11% percent are seniors, and eight percent are veterans. More than a third of residents are formerly homeless. Prospective renters go through Ability Housing to apply for one of the coveted new homes.

On the day the Tiny Houses opened, Mrs. Weaver said to the crowd:

“I’ve been intrigued by the concept of tiny houses ever since I first heard of them. We are all praying for the people who are living here to start a new life, from whatever they’ve come from, in the new houses. They will make them their home.



Dixie Merchant, a former social worker, intermittently lived out of her car when she was out of work because of a back injury. She's one of the first residents of Tiny Houses on Navaho.



the momentum grows...

THE POWER OF
GIVING
FORWARD



6 on Elm

Affordable housing is needed across our region – not just in Jacksonville and St. Johns County.



The need for suitable housing in Nassau County prompted us to make a connection which resulted in a substantial gift from the **Delores Barr Weaver Legacy Fund** to **Nassau Habitat for Humanity**. The gift allowed NHFH to purchase the land to build six townhomes as an affordable housing subdivision. Plans were approved, building commenced and in September, the first families were given the keys to the first two residences at '6 on Elm.'

Welcome home to Katrina Griffith and her daughter Laniyah Richo, and Shamika Alberta and her daughter Sydney Battle.



Photos by JaderaMae Kraus

CREATING OPPORTUNITY IN FERNANDINA BEACH

FROM ONE WHO HAS BEEN THERE...

When I was 14, my mom got approved for a home through Nassau Habitat for Humanity. This home gave my mom so much, a safe place to live herself, a healthy environment to raise me in, a sense of empowerment because she was OWNING her home solely for the first time ever, a payment that she could make without working 4+ jobs (which allowed her to go back to college). Thanks to her college classes she was able to get into her dream job at her dream facility. This home gave my mom so much. In return this home gave me a lot as well!

A happy mom, a safe place to live and grow, and a connection to Nassau Habitat for Humanity.



Right: Families moving into Nassau Habitat for Humanity homes receive handmade quilts from the Amelia Island Quilt Guild.



THE POWER OF

GIVING



to build greater
impact...

FORWARD



small grants make A BIG DIFFERENCE

We specifically set aside part of our Foundation-directed grantmaking budget to address the needs of small organizations – those with operating budgets of less than \$200,000.

Many times, these small organizations are ‘punching above their weight’ in the impact they have in their communities. This was the second year we solicited applications in this category, and the number of applicants doubled, with most of the requests aimed at serving children.

In 2021, we made ten grants of \$2,000 each to these organizations:

1 Step Up Jax

Civic Orchestra of Jacksonville

Empowerment Academy

Heart for Children

Impact of U

Masters of Education

Mission of the Dirt Road

The \$1,000 Start-Ups Consortium

The Center One Foundation

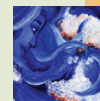
Us & Our Children



We made a \$2,000 grant to Mission of the Dirt Road, a small-but-mighty ministry in Clay County. This church-based mission focuses on helping residents of High Ridge Estates, a low-income neighborhood just outside Keystone Heights. Started in 2016, Mission of the Dirt Road serves as a community center/classroom/craft studio/kitchen/lending library and all-around support center for nearby residents.

Mission of the Dirt Road applied for and received a Small Organization grant of \$2,000 in 2021. The grant’s purpose was ‘to support the expansion of the community development program.’ Even with obstacles presented by COVID, Mission of the Dirt Road was able to provide ‘Mission: Community’ classes at their facility, partnering with 17 organizations and various community leaders. They also used their funding to provide healthy meals at the classes, buy supplies for activities like gardening, cooking demonstrations and crafts, and paid for five new volunteer background checks.

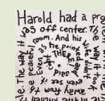
In addition to writing the grant check, our staff’s interaction with Mission of the Dirt Road’s leadership led to opportunities for more funding. A \$10,000 grant from another funder will let them create a tool-lending library and pilot a program they call ‘Mission: Revitalize’ to help homeowners with home repairs and financial coaching. And they were encouraged to apply for the Guidewell Growing Resilient Community Challenge for which they received \$5,000 as a semi-finalist.



“We are incredibly grateful for the \$2,000 grant from The Community Foundation for Northeast Florida because it enabled us to improve our ‘Mission: Community’ classes with quality food and supplies; but when we think about our growth in the last six months, it is that guidance from Community Foundation staff members that seems invaluable.”



Reverend Carey Morford, founding pastor of Mission of the Dirt Road



Preparing Black & Minority Contractors for **SUCCESS**

WE MADE A MAJOR COMMITMENT TO SUPPORT THE CONTRACTORS ASSISTANCE PROGRAM LAUNCHED BY THE BLACK BUSINESS INVESTMENT FUND FLORIDA.



BBIF is a nonprofit Community Development Financial Institution (CDFI) that helps Black, minority and underserved small businesses thrive by providing loan capital alongside business development training. We were able to make a 2-year,

\$120,000 grant to BBIF—supported by a \$60,000 grant of Foundation-directed funds and a \$60,000 grant we requested and received from the Jessie Ball duPont Fund on BBIF's behalf.

The Contractors Assistance Program (CAP) provides local Black and minority licensed general contractors and subcontractors with industry-specific business advisory services. According to BBIF, after years of helping Black contractors scale and grow their business, they found that many were missing out on large

contract opportunities due to a lack of working capital, bonding challenges, high insurance mandates, and a lack of procurement opportunities for smaller prime contracts. To bridge the gap, BBIF's CAP program helps build Black contractors' management skills, strengthen business capacity, grow revenue, increase access to affordable capital and WIN more PROJECTS.

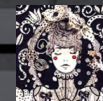
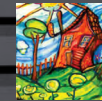


Photo by Doug Eng

a tapestry of lasting beauty takes shape...

2021 Art Ventures Individual Artists

Each of these individual artists from Northeast Florida was selected to receive a \$3,500 grant through our Art Ventures program. They were chosen for their demonstrated artistic talent as well as their aspirations to refine an aspect of their craft.



Megan Baker



Raquel Benjamin



Sarah Clarke Stuart



Danisha Edwards



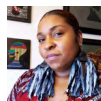
Lenny Foster



Agnes Lopez



Niam Jones (Willie Evans Jr.)



Ahyanna Shepard



Jennifer Veal



Jeff Whipple



Nikesha Williams



Jaimie Wilson



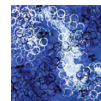
Vanessa Withun



Rania Woodward



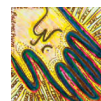
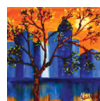
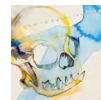
Aligning charitable passions with maximum impact. That's what powers
GIVING FORWARD.



ADVISED:

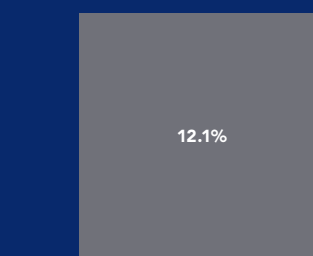
\$32 M | 76%

A charitable account which allows individuals or families to recommend grants to the nonprofit organizations, schools & religious institutions of their choosing.



2021 GRANTS DISTRIBUTION BY FUND TYPE

at The Community Foundation



ORGANIZATIONAL & DESIGNATED ENDOWMENTS:
\$5.1 M | 12.1%

Support a specific non-profit organization, school or religious institution in perpetuity. Individuals or the nonprofit itself may establish this fund.



ADV
\$32 M



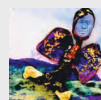
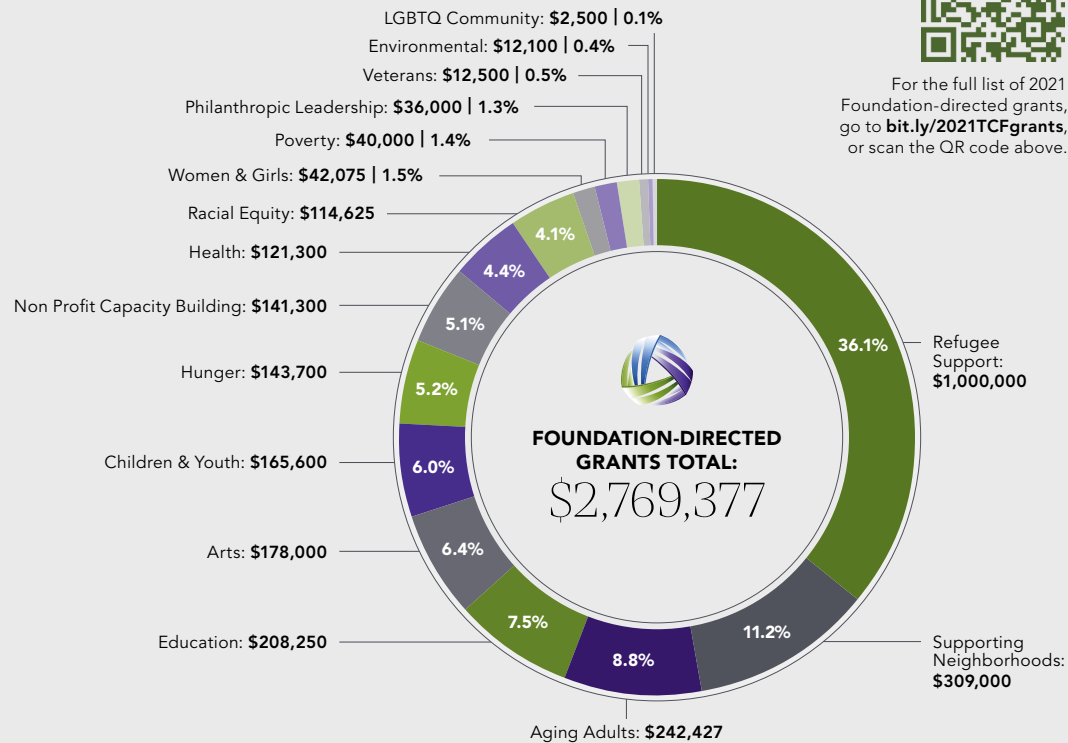
the original idea
amplified...



FOUNDATION-DIRECTED FUNDS

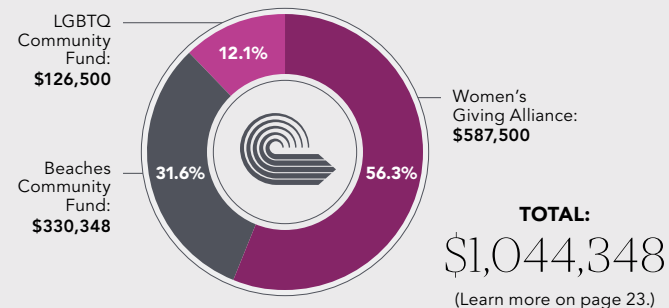


For the full list of 2021 Foundation-directed grants, go to bit.ly/2021TCFgrants, or scan the QR code above.



COLLECTIVE GIVING

A.L. Lewis Black Opportunity & Impact Fund:
Established 2021;
grantmaking to begin
in the near future.



FIELD OF INTEREST: \$1.7 M | 4%

Targets the needs in a specific area of community life, and entrusts The Community Foundation with the responsibility of selecting grant recipients.

UNRESTRICTED: \$1.0 M | 2.4%

The Community Foundation's leadership determines where the community's needs are greatest, and concentrate resources to fulfill that effort.

COLLECTIVE GIVING: \$1.0 M | 3.3%

Like-minded people pool their resources and decide collectively where, when and how to award grants. Giving as a group, donors are able to achieve a greater impact than they might alone.

SUWANNEE VALLEY: \$0.7 M | 1.7%

An affiliate fund of The Community Foundation for Northeast Florida, comprised of Columbia, Hamilton, Lafayette, Suwannee & Union counties. It is governed by a local advisory board.

AWARDS & SCHOLARSHIP: \$0.2 M | .5%

Help current & future students pursue education, professional development or other educational enrichment opportunities.

USED:
76%

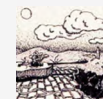
Leveraged Funding through Philanthropic Leadership at The Community Foundation

THE MULTIPLIER

GRANTMAKING—WITH AND ON BEHALF OF OUR FUNDHOLDERS—IS FUNDAMENTAL TO OUR MISSION.

But often, writing the grant check is just the beginning. We frequently are able to connect local, and sometimes regional and national philanthropists with area nonprofit organizations in pursuit of greater financial support for the work we and others are doing.

In 2021, in addition to our budgeted Foundation-directed grantmaking of over \$2.7 million, we were able to attract an additional \$4 million from local donors to support our initiatives and other community needs. We did this by introducing funders, obtaining outside grant dollars, and surfacing outside investments from other sources. Some examples of this multiplier effect include:



Fostering the ideas that magnify generosity. That's what powers

GIVING FORWARD.

1

LIFT JAX, a key partner in our Supporting Neighborhoods strategic initiative, received a grant of \$105,000 from us in 2021. We were also able to introduce a family foundation to the Lift/Jax work and that foundation made a \$1 million grant to support its efforts.

2

MyVillage Fund began here at The Community Foundation and we supported it this year with a \$10,000 grant. We also connected a private foundation to the MyVillage Fund work, which resulted in a new \$450,000 investment.

3

Daily Manna is a small grassroots nonprofit in North Riverside—we made a \$2,000 grant to them in 2021. We informed an interested individual fundholder about their agency, and as a result, Daily Manna received a \$5,000 grant.

4

Lutheran Social Services is doing crucial refugee resettlement work, and we were able to give them a grant for \$10,000. When a corporate foundation sought our advice as to how to support refugees coming into our community, we were able to facilitate an additional \$100,000 grant.

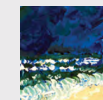
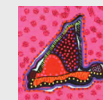
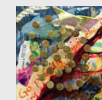
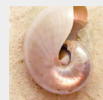


Right: 'LIFT JAX is an initiative of business and community leaders working to eradicate generational poverty, with a focus on Jacksonville's Eastside.'



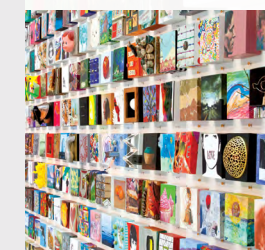


Members of the Beaches Community Fund learn about needs in their community and activate their grantmaking in response.



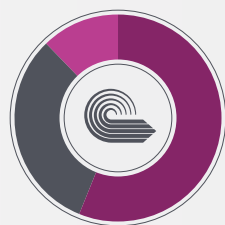
PLIER EFFECT

THE POWER OF



nearly 1,000
times over...

GIVING FORWARD



**WOMEN'S GIVING
ALLIANCE**
THE COMMUNITY FOUNDATION

The Women's Giving Alliance, an initiative of The Community Foundation, celebrated its 20th anniversary in 2021. WGA was the brainchild of Courtenay Wilson, Ann McDonald Baker, Dr. Doris Carson, Helen Lane, and Delores Barr Weaver. Together, this Mighty Five launched a collective giving effort that has raised and distributed more than \$7 million to support women & girls in Northeast Florida. They have also created an endowment of nearly \$6 million to ensure this work goes on in perpetuity.

For more information, go to www.wganeff.org.



The Beaches Community Fund which collectively pools investments by three dozen Beaches-area families made more than \$355,000 in grants in 2021. A total of \$1.6 million has been granted by this group of generous neighbors since they formed the Beaches Community Fund in 2015.

For more information, go to www.jaxcf.org/learn/beaches-community-fund.



The LGBTQ Community Fund for Northeast Florida has been making grants since 2014, and in 2021, the Fund made more than \$100,000 in grants to five local nonprofits. The Fund's grantmaking is centered on building a community that welcomes and supports all people.

For more information, go to www.jaxcf.org/lgbtq.



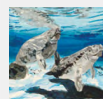
The A.L. Lewis Black Opportunity & Impact Fund was established at The Community Foundation in 2021, created by committed local Black leaders who met for more than a year to explore pooling their resources and elevating Black philanthropy. The A.L. Lewis Fund is our fourth collective giving effort, and its members have pledged to work together to advance equity and justice by making strategic investments in Jacksonville's Black community. Grantmaking is expected to begin in the near future.

For more information, contact Wanda Willis, Vice President, Civic Leadership at wwillis@jaxcf.org.

5

COLLECTIVE GIVING

When like-minded donors come together with a passion for putting their assets into action, something extraordinary happens: the whole becomes far more than the sum of its parts. Collective giving can make a larger financial impact and creates momentum that is more difficult to achieve with a single gift.



In 2021, they granted a total of \$1.0 million to help women and girls; LGBTQ families, elders and youth; and underserved residents at the Beaches.



BRINGING CLOSURE TO A PHILANTHROPIC JOURNEY

LINDA CRANK MOSELEY

As one of The Community Foundation's longest-tenured fundholders, Linda Crank Moseley has been using her donor-advised fund as part of her overall philanthropy for nearly 30 years. Like most fundholders, she's supported numerous organizations she was connected to and causes that were important to her.

Now in her 90s, Linda wanted to finish the work she started back in 1994. Working with John Zell, VP of Development, she arranged to distribute what remained in her DAF. John remembers, *"When Linda called me to talk about her fund, she felt like she needed to pay it out so she would know it had been done."*

John, Linda and her son Thaddeus discussed what had given Linda the most joy in her philanthropic journey, and how to support those efforts one last time. It was a special opportunity to look back over a lifetime of giving and see the themes that resonated over the years.

A voracious reader since childhood, she's a passionate supporter of education, funding everything from organizations tackling illiteracy to colleges and universities, including not only her alma mater, Vanderbilt University, but historically Black and Native American institutions of higher learning. She also supports organizations that open one's eyes to the broader community and our place in the world.

Linda supports agencies that help those in need in a cost-effective but compassionate way. She's also a staunch advocate for informed voting practices and encouraging people to vote to support democracy. She cherishes the natural beauty around her and has regularly given to organizations that protect the environment, especially the St. Johns River, and local and national parks.

At the end of the meeting, Linda had made 10 grants to organizations, established her WGA Legacy Fund, and added significant grants to six designated or agency endowments at the Foundation.

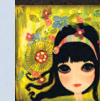
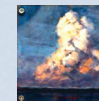
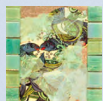
Looking back, Linda notes, *"local or national prosperity was not part of my growing up."* But she had the gift of helping people see what they were good at, and nurturing that in the organizations with which she worked. She was able to see the outstanding needs and opportunities, and helped those organizations move forward—her talent led her to become president of the Jacksonville Junior League and the

founder of the Women's Auxiliary at what is now UF Health. Her advice to those just starting their philanthropic journey? Get involved as a volunteer to learn more about an organization's work.

Linda Moseley is decidedly humble about the gifts she's made over the years, and credits her strong partnership with John as an advisor on her journey.

"It's been the making of my relationship with the Foundation. We share the same ideals."

Linda Crank Moseley





CELEBRATING THE
CORPORATION OF THE
LAW OFFICE
OF
EARLE CRANK



CLOCK SUNDAY,
SEPTEMBER 26, 2004
COURT HOUSE SQUARE
MAIN STREET
LOUISA, VIRGINIA

Dear Elaine

There is no place I'd rather be on Nov. 3
than in Louisa. I have tried to rearrange
things and find an easy way to fly, but
all got too complicated. That was not
free to drive up as Fiona is out of the
country. I know it will be a festive and
totally rewarding day. I will be thinking
of all of you, with gratitude for all
that the Historical Society's efforts
have done for Louisa County.

I meant to send this contribution
earlier, to help meet your last stated
goal for the Nickie House. However, I
suspect you have achieved that by
now, so will make this a gift to
the Society to be used entirely at
your personal discretion. Am sure you
always have more creative ideas than
the means to activate them!

Which reminds me to tell you
again how proud I am each time
to see my parents' names in the credit
line for your interesting programs
and speakers. Am sure they're up
there somewhere, overlooking and
enjoying everything! Best always -

10/25/13

Linda

2017.02.055

8/12

A Historical Passion Stands the Test of Time

Linda is passionate about education and history. Early on, she established the W. Earle and Phyllis Collins Crank Memorial Endowment in honor of her parents, to benefit the Louisa County Historical Society in Virginia. It was a great match—she grew up in the small rural community of Louisa during the Depression. Her father was the Commonwealth's attorney and her family knew everyone in Louisa County.

"I'm not sure my parents ever used the word 'philanthropy,'" she remembers. But they quietly helped friends and neighbors who struggled, and would often find fresh produce on the back porch, left by grateful recipients of her parents' assistance.

The Society acquired the law office building Mr. Crank practiced in for a decade after his retirement as the Commonwealth's Attorney; he had moved out of his office in the Louisa County Courthouse. They restored the old building and used it as their "home" for 10 years. The Endowment, housed here at the Foundation, continues to be used for programs and projects of the Louisa County Historical Society.

Linda believes in letting an organization determine where the funds are needed most. She has been impressed with the Society's work of preserving historical documents, news articles and buildings. For years the Louisa Society used their annual support from the fund Linda created to provide educational programs for local residents—and still does.

Linda was particularly impressed when the Society chartered a bus to take local residents to the National Museum of African American History and Culture when it first opened. The Society has been successful in working to include documents and artifacts from the local African American community, doing what it can to preserve the history of all Louisa's residents.

Linda was unable to make the trip, but says adamantly, "I'd have been on that bus if I could have."

Linda's support of the Historical Society has been transformative.



giving birth
to something
bigger...

“We owe a great debt to Mrs. Moseley...she's a pillar of the Historical Society!”

Katelyn Coughlan, Executive Director, Louisa County Historical Society



Legacy Society Members

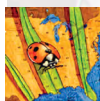
at The Community Foundation

The Power of Giving Forward is personified in those noble donors who have established endowed funds and/or included The Community Foundation in their estate plans. Their desire to improve and enhance their communities, even after they are gone, represents the ultimate expression of philanthropic purpose. We are honored to work with these donors, their professional advisors and their heirs to carry out their wishes.

Sybil B. Ansbacher
Jill Arnold
Adrienne A. Arnone
Bailys Rein Families
Martha Frye Baker
Tim & Karen Baughman
Eli & Martha Bekkum
Rhonda Benizzi
Arthur R. & Marvis Anne Bocchieri
Gerald F. & Susan J. Bott
Mary & Bruce Bower
Steven J. & Joy R. Boyne
Caroline Brinton
Leslie W. Brotman
J. Shepard & Mary Ann Bryan
J. F. Bryan, IV
Pat E. Burke
Sandra S. Burnaman
James & Mary Burt
Mary F. Carter
Arch W. & Lo B. Cassidy
Gary & Nancy Chartrand
Cynthia Chomiak
Edward & MaryAnne Cipperly
Dale L. Clifford
Howard C. Coker
Sandy L. Cook
Stephanie Cost
Janet Cote-Merow
Claudia C. Crawford

Agnes E. Danciger
Robert D. & Isabelle T. Davis
Stephen E. & Suzanne C. Day
Joyce Greenfield DeVillez
Lory C. Doolittle
Dorothy Simpson Dorion
Barbara J. Drake
Helga Dube
Michael & Helen DuBow
DuBow Family Foundation
Susan E. DuBow
Dan & Cindy Edelman
Matthew E. & Susan Datz Edelman
Peter Elsaesser
Shelagh Engstrom
Pam A. Field
Michael & Linda Fisher
Alan R. Foster & Kaye Lawson
Betty Francis & Ray Walshe
Crystal L. Freed
Cherry Gallagher
Nat & Doris Glover
Suzanne Gatling Godwin
Susan Golden
Doris Goldstein
Margaret Gomez
Linda M. Gordon
Melvin & Debbie Gottlieb
Alex Graham
Regina A. Greenwood
Mattox S. Hair
Laurence & Carol Hall
Margaret Carolyn Hall
Barbara H. Harrell
John T. Hayt
Janet S. Healy
Amy Heimann
Lindsay D. Helms
David C. & Cara Hodges

Robert & Wendy Hogan
John & McGlade Holloway
Bruce & Judy Homeyer
Patricia G. Horowitz
Linda L. Hossenlopp
Patricia Howell
David S. Hoyte
Marie L. Inge
William O. Inman, III
Rebecca B. Johnson
Martha A. Jones
Hugh H. & Jacqueline C. Jones, Jr.
Charles M. Keller & Laura T. Quinn
Morton & Delores Kesler
James V. & Susan Knutzen
Richard A. & Becky L. Kocerha
Blanche & Steven Koegler
Aaron Burton & Mary Lou W. Krosnick
Jean C. Krueger
Anthony S. & Virginia Y. Kurlas
Edward W. & Helen M. Lane
Kathleen Langford
Joseph V. & Victoria Lauricella
Alan R. Foster & Kaye Lawson
Sally B. Lee
Allen & Sharon Lennon
Ilene S. Levenson
Mary M. Lever
Gary & Susan Lewis
Paula L. Liang
Kate M. Ligare
Rutledge Liles
Hal L. Lynch, Jr.
Wilford C. & Eleanor P. Lyon



Eugene W. Majewski
 Edwin & Elizabeth Malesky
 Amy Margerum Berg
 W. Gary McCalla
 Edgar W. McCurry, III
 Frances McCurry
 Scott McGehee
 Robert & Geraldine M Melosh
 William H. & Theresa C. Merriam
 John & Anita Mitchell
 Helen Morse
 Linda Crank Moseley
 Mark & Judy Mullins
 Robert & Barbara Nellson
 Joan W. Newton
 Robert & Indu Nickerson
 Duane & Susan Ottenstroer
 Nancy J. Overton
 Sallyn Pajcic
 Grady C. & Rebecca T. Parker
 John R. & Jane K. Parkyn
 Maureen Kingsley Paschke
 John S. Peyton
 Carolyn Phanstiel
 Julia & Charles Pickren
 Kelly L. Pietan
 Mary F. Pietan
 Lynne Stephenson Raiser
 John G. Reed, Jr.
 Barbara Lane Resnick
 Charles A. & Laura L. Rickman
 J. Stephen & Dorothy J. Risley
 Susan Lutton Rodgers
 George Rowe
 Kenneth & Gail Rowles
 Paul & Mary Jo Tlsty-Rushton
 Kim Rutkowski
 Susan Remmer Ryzewic

Frederick W. & Susan West Schantz
 William & Peggy Corbin Scheu
 Peggy Schiffers
 Robert & Judy Schnitzer
 Ryan A. Schwartz
 Lonette D. Seaton
 Benjamin A. & Melanie Setzer
 Ina Richter Shainbrow
 A.L. & Ruth Shantz
 Helen E. Short
 Laine S. Silverfield
 David A. & Linda B. Stein
 Fiona L. Strathern
 Constance Stumin
 James S. & Nancy B. Taylor
 Julia W. Taylor
 Fredric & Janice Teich
 Marion Tischler
 Paul & Mary Jo Tlsty-Rushton
 Larry & Monica Tremonti
 W. Glenn Turner
 John D. & Mary Jane Uible
 Carl Utter
 Jim & Joan Amery Van Vleck
 W. Lester & Marjorie Varn
 Ms. Brenda B. Verbeck
 Drenda Vijuk
 Dori C. Walton
 Linda W. Watkins
 Carole A. Watson
 J. Wayne & Delores Barr Weaver
 Ms. Elaine T. Weistock
 Carol J. Weldon
 Klaus & Barbara C. Wenger
 Tracey Westbrook
 Skip & Margaret Wiegand
 Linda F. Wilkinson
 Arthur L. Williams
 Courtenay Wilson
 Ellen Wiss
 Bernard R. & Gail Yvon
 Anonymous – 9

PROFESSIONAL ADVISORS

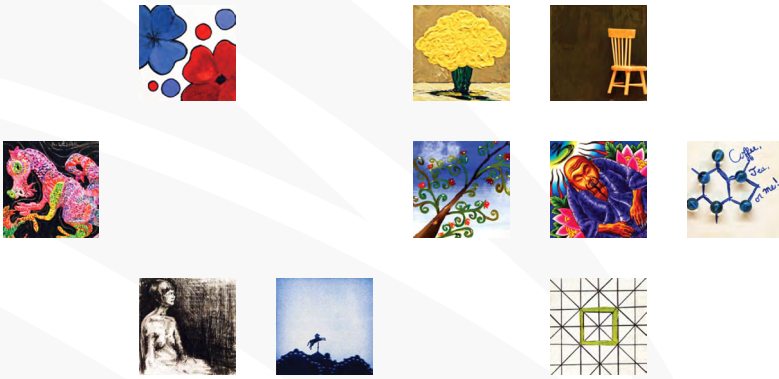
Many of our Legacy Society members come to The Community Foundation by way of their professional advisor—an estate attorney, CPA, financial planner or other professional who helps guide their financial strategy. These professional advisors understand that for select clients who have charitable intentions, a fund at The Community Foundation can maximize both their financial and philanthropic objectives. Referrals to The Community Foundation by these professional advisors benefits the client, and by becoming part of The Community Foundation, the Northeast Florida community is also enhanced.

We have relationships with dozens of professional advisors throughout Northeast Florida and we greatly appreciate their partnership.



The Chimes Project
 "Let Freedom Ring"
 Compassionate St. Augustine
 Photo by laird/blac palm, inc.

*a transformation
to behold...*



660 Funds at The Community Foundation

UNRESTRICTED FUNDS

Allow The Community Foundation leadership to determine where the community's needs are greatest, and to concentrate resources to fulfill that effort.

Lois & Donald Cottrell Endowment Fund
A.D. Davis Family Advised Fund - Lee Davis
The Community Endowment Fund
First Guaranty Bank & Trust Company Endowment
Bernard V. Gregory Endowment Fund
Independent Life Insurance Company Endowment
Brady S. Johnston Charitable Fund
Kathryn & Richard Kip Endowment Fund
Thomas M. Kirbo & Irene B. Kirbo Charitable Trust
Nancy Hazard McCreight Memorial Fund
Frank & Ann McGehee Endowment
Grady C. & Rebecca T. Parker Endowment
Marian J. & Gordon A. Roberts Fund
Kathy Rude Charitable Fund
Norwood H. & Mary Elizabeth Sandifer Endowment Fund
Harold K. Smith Charitable Fund
Jay & Deanie Stein Unrestricted Fund
John D. & Mary Jane Uible Endowment
Venture Philanthropy Endowment Fund
Arthur L., Jr. & Angela H. Williams Fund
Anonymous

1982
1994
2005
1991
1997
1995
1987
1997
1990
1982
1997
2015
2005
1983
1986
1997
2011
1991
1990
1993
2016

FIELD OF INTEREST FUNDS

Target the needs in a specific area of community life, and entrusts The Community Foundation with the responsibility of selecting grant recipients.

Aging Adults

I. R. Bowen & Katherine H. Bowen Fund 2003
Grace H. Osborn Endowment 1994
J. Wayne & Delores Barr Weaver Senior to Senior Endowment 2009

Animal Welfare

Jeffrey Edgar Endowment 2019

The Arts

Art Ventures Endowment Fund 1990
Ann McDonald Baker Art Ventures Award Fund 2014
J. Shepard, Jr. & Mary Ann Bryan Arts Endowment 2000
Dr. JoAnn Crisp-Ellert Fund 2007
Independent Life Minority Arts Award Fund 1992
Anne & Sallyn Pajcic Art Ventures Endowment 2011
Alynn Sharp Art Fund 2012
Delores Barr Weaver Black Artists Endowment 2020

Children

Jacksonville Children's Endowment 1993



Stimulating philanthropy one relationship at a time. That's what powers **GIVING FORWARD.**

Field of Interest Funds

A field of Interest fund is created by generous donors who have a passion for a particular topic or subject area, but they want The Community Foundation to decide which agencies will best serve their purpose. Two new fields of interest were created in 2021 – a **Local Investment** field of interest which supports our recently added strategy for impact investing in our community and a **Refugee Resettlement** field of interest that has focused on Afghan refugee support. For more information about establishing a field of interest, please contact John Zell, jzell@jaxcf.org or (904) 356-4483.



Disaster Relief

The Community Disaster Relief Fund	2016
Respond/Adapt/Recover Fund	2020

Education

Peyton Early Literacy Endowment	2007
Quality Education for All Endowment Fund	2013

Health

Kenneth H. Millar, Jr. Memorial Fund	1993
Byon Morris Charitable Fund	1992
Esther Pope Memorial Endowment	1989

Indigent

Donald & Terri McIntire Fund	2006
Simon J. Peabody Fund	1997
Robert T. & Carol R. Shircliff Discretionary Grantmaking	1988

LGBTQ

Chartrand Family LGBTQ Endowment Fund	2018
LGBTQ Community Endowment Fund	2018

Local Investment

J. Wayne & Delores Barr Weaver Local Capital Legacy Fund	2021
J. Wayne & Delores Barr Weaver Local Capital Endowed Legacy Fund	2021
The Community Local Capital Fund	2021

Neighborhood/Development

Bank of America Neighborhood Endowment Fund	1999
Jacksonville Neighborhood Endowment Fund	1998

Nonprofit Capacity/Grassroots Organizations

Jessie Ball duPont Reflective Practice Endowment Fund	2007
Delores Barr Weaver Grassroots Grants Endowment	2020

Women & Girls

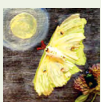
WGA Pooled Grantmaking Fund	2002
WGA Operations & Special Projects Fund	2014
Women's Endowment Fund	2001

Putnam County

Frank V. Oliver, Jr. Endowment	2010
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Refugee Resettlement

Afghan Refugee Support Fund	2021
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ORGANIZATIONAL & DESIGNATED ENDOWMENTS

Support a specific non-profit organization, school or religious institution in perpetuity. Individuals or the nonprofit itself may establish this fund.

Organizational Endowments

100 Black Men of Jax. Bernard V. Gregory – Scholarship Fund	1997
Amelia Island Chamber Music Festival Endowment	2018
Angelwood Endowment	2019
The Arc Jacksonville Endowment	2003
Attending Staff Foundation Endowment Fund	1990
Barnabas Center Endowment	1989
BEAM Endowment	2020
Christy Birong Youth Leadership Jacksonville Endowment	1990
Boys & Girls Club of Northeast Florida Endowment	1991
The Bridge of Northeast Florida, Inc. Endowment Fund	1998
The Cultural Council of Greater Jacksonville Endowment Fund	1999
Douglas Anderson School of the Arts Endowment	1989
Feeding Northeast Florida Endowment	2019
Florida Council on Economic Education Jacksonville Endowment	2009
Florida Theatre General Endowment Fund	1999
Florida Theatre Preservation Fund	1993
GALF Scholarship Endowment	2021
Gateway Girl Scout Council Endowment Fund	1996
Girls Incorporated of Jacksonville Endowment Fund	2019
Hugh & Susan Greene Endowment for Cathedral Arts Project	2016
Greenscape of Jacksonville, Inc. Endowment Fund	1992
Elizabeth Edgar Hall Endowment	2015
Florida Rugby Endowment	2021
HandsOn Jacksonville, Inc. Training & Education Fund	1990
The Heal Foundation Endowment	2015
INK's Make Your Mark Endowment	2017
J.F. Bryan, IV Community Development Award Fund	2021
Jacksonville Public Education Fund Endowment	1991
Jacksonville Symphony Association Endowment Fund	2009
Jacksonville Volunteer Lifesaving Corps Second Century Fund	2013
JAGA Charitable Trust Endowment	2014
Junior League of Jacksonville, Inc. Endowment	1997
Kappa Alpha Psi Foundation, Inc. Endowment	2021
The L.S.S. Endowment Trust	1989
MaliVai Washington Youth Foundation Endowment	2021
Memorial Park Association Endowment	2021
Ralph & Elizabeth Mundell Endowment	2007
Museum of Science & History of Jacksonville General Endowment	1994
Nonprofit Center of Northeast Florida Endowment	2010
North Florida School of Special Education Endowment	2021

Pine Castle Endowment	1990
Planned Parenthood of S, E, N Fla in Support of Men's Health	2011
Planned Parenthood of S, E & N. Fla. – End IMO Dr. D. Carson	2000
St. Johns River Legacy Endowment	2012
St. Vincent's Medical Center Endowment	1989
Barton Suter Family Endowment for Angelwood	2018
Theatre Jacksonville Operating Endowment Fund	2016
Tree Hill Endowment	1991
United Way of Northeast Florida, Inc. Endowment Fund	1991
Very Special Arts Florida-Jacksonville Fund	1994
Voices for Children Endowment	2007
Women's Club of Jacksonville Endowment	2015
World Affairs Council – Jacksonville Endowment	2014

Designated Endowments

American Indian College Fund	2020
Sybil Barnett Ansbacher Women's Giving Alliance Endowment	2011
Jill Arnold Women's Giving Alliance Endowment	2016
Arc Village Endowment Fund	2014
Christie Atkerson Fund for Jacksonville State University	2021
Ann McDonald Baker Women's Giving Alliance Endowment	2010
Martha Frye Baker Women's Giving Alliance Endowment	2014
Sally Baker Lee Women's Giving Alliance Endowment	2017
Frank Barker Memorial Fund	2011
Barnabas Endowment Fund	2013
Wanda J. Lanier Endowment for the benefit of Barnabas Center	2021
Claudia Adams Barr Endowment	2014
BASCA Facilities Endowment	2020
Beavers/Burt Endowment Fund	1998
Amy Margerum Berg Women's Giving Alliance Endowment	2016
Kitty R. Berry Memorial Fund	1991
Betty Griffin House Endowment	2007
Blanchart Family Endowment Fund	2011
Blanchart Family Endowment Fund for L'Arche Harbor House	2011
Mary & Bruce Bower Alexis de Tocqueville Endowment	2000
The Brain Tumor Network Designated Fund	2018
Leslie W. Brotman Women's Giving Alliance Endowment	2020
G. Howard Bryan Endowment Fund	2006
Shep & Mary Ann Bryan Endowment / Daughters of Charity	1999
Shep & Mary Ann Bryan WJCT Endowment Fund	2001
Patricia E. Burke Women's Giving Alliance Endowment	2015
Sandra Burnaman Women's Giving Alliance Endowment	2014
Camp Boggy Creek Campership Fund	2014
Lillian I. Cannon Endowment for The Bridge	2010
Mary F. Carter Women's Giving Alliance Endowment	2015
Cathedral Arts Project Endowment	2013
Nancy Chartrand Women's Giving Alliance Endowment	2010
Cynthia Chomiak Women's Giving Alliance Endowment	2017



a metamorphosis...

Agency Endowments



The Community Foundation is the home to many Agency Endowments —special designated funds in which a source of perpetual funding is established to benefit a specific organization. We were honored to add six new agency endowments to our roster in 2021:

- **Florida Rugby Endowment**
- **J.F. Bryan IV Community Development Award Fund**
- **Kappa Alpha Psi Foundation, Inc. Endowment**
- **MaliVai Washington Youth Foundation Endowment**
- **Memorial Park Association Endowment**
- **North Florida School of Special Education Endowment**

For more information about establishing an agency endowment, please contact John Zell, jjzell@jaxcf.org or (904) 356-4483.

How to Mean Something to Someone

Citizens for a Scenic Florida Endowment Fund	1999
Dale Lothrop Clifford Women's Giving Alliance Endowment	2015
W. Earle & Phyllis Collins Crank Memorial Endowment	1995
Community Hospice Patient Care Endowment	2007
Comunita Cenacolo America Endowment	2007
Continental Societies Inc., Jacksonville, FL Chapter Endowment Fund	2006
Sandra L. Cook Women's Giving Alliance Endowment	2016
Jackie Cornelius Artist in Residence Fund	2017
Stephanie Cost Women's Giving Alliance Endowment	2014
Cummer Museum Art Connections Endowment	2015
Agnes E. Danciger Women's Giving Alliance Endowment	2021
Robert D. Davis Family Endowment	2009
The DESC Endowment	2014
Lory Doolittle Women's Giving Alliance Endowment	2017
Dorothy S. Dorion Women's Giving Alliance Endowment	2013
Douglas Anderson School of the Arts Fellowship Endowment	2007
Barbara J. Drake Fund for JASMYN	2019
Barbara J. Drake Women's Giving Alliance Endowment	2011
Dreams Come True Client Dreams Endowment	2007
Dreams Come True Endowment Fund	1992
Catherine M. Drompp Women's Giving Alliance Endowment	2018
The Cindy Edelman Excellence in Teaching Fellowship Fund	2017
Cynthia G. Edelman Women's Giving Alliance Endowment	2013
Pam A. Field Women's Giving Alliance Endowment	2018
Betty L. Francis Women's Giving Alliance Endowment	2019
Crystal L. Freed Women's Giving Alliance Endowment	2015

Gateway Community Services Expansion Fund	2020
Gateway Community Services Transitional Housing Endowment	2007
Dr. Maurice H. Givens & Dr. David E. Rogers Fund	1992
Doris Sussman Goldstein Women's Giving Alliance Endowment	2012
Margaret Gomez Women's Giving Alliance Endowment	2012
R.E. & J.M. Gray Fund	2000
Joyce Greenfield DeVillez Women's Giving Alliance Endowment	2020
Greenwood School Endowment Fund	2005
Martha Hammock Fund	2020
Barbara Hicklin Harrell Women's Giving Alliance Endowment	2010
Cris Hayes Women's Giving Alliance Endowment	2014
Janet S. Healy Women's Giving Alliance Endowment	2013
James Hehn Memorial Endowment Fund	2009
Lindsay D. Helms Women's Giving Alliance Endowment	2012
M. Clare Herald Endowment Fund	2010
David M. & Ann C. Hicks Tocqueville Endowment	2008
Hope Haven Client Scholarship Endowment	2007
Marshall Horowitz Memorial Fund	1992
Linda L. Hossenlopp Women's Giving Alliance Endowment	2014
Hubbard House Endowment	2007
Hubbard House Endowment Fund	1990
Jacksonville Children's Chorus Chorister Scholarship Endowment	2007
Jacksonville Health Education Program Borland Library Fund	2012
The Jacksonville Symphony Endowment	1992
JASMYN Campus Park Endowment	2020
Jewish Community Alliance Endowment	1995
Jewish Family & Community Services Endowment	2007
Rebecca B. Johnson Women's Giving Alliance Endowment	2018
Martha A. Jones Women's Giving Alliance Endowment	2015
Nancy M. Jones Women's Giving Alliance Endowment	2021
K9s for Warriors Endowment	2020
Albert & Viola Kissling Endowment Fund	1990
Valdemar Joost Kroier Endowment Fund	1986
Valdemar Joost Kroier Endowment Fund II	1990
Jean Krueger Women's Giving Alliance Endowment	2020
Lamp of Jesus Endowment Fund	1979
Helen & Edward Lane Endowment Fund	1997
Helen & Edward Lane Alexis de Tocqueville Endowment Fund	2000
Helen & Edward Lane Endowment Fund II	1997
Helen & Edward Lane Endowment Fund III	1998
Helen Murchison Lane Women's Giving Alliance Endowment	2010
Kathleen Langford Women's Giving Alliance Endowment	2014
Ilene S. Levenson Women's Giving Alliance Endowment	2016
Mary M. Lever Women's Giving Alliance Endowment	2021
Paula L. Liang Women's Giving Alliance Endowment	2014
Kathleen M. Ligare Women's Giving Alliance Endowment	2019
Mary J. Lindsley Fund	1992
Eleanor & Wilford Lyon WJCT Endowment	2000
Ruth Townsend Manning & Sallie Townsend Benson	

Endowment Fund	1998
James L. Mathas Foundation	2011
Jane Atherton Mawdsley Fund	1992
Mayse-Turner Fund for Public Performance of Classical Music	2008
Mayse-Turner Fund for Anglican Hymnody	2008
Nancy M. McDonald Endowment	2005
Delia H. & Thomas R. McGehee Endowment Fund	1989
Scott L. McGehee Women's Giving Alliance Endowment	2021
Nadia Lamb Mead Endowment	1995
Micah's Place Endowment	2007
Sandy Miller Metrotown Programs Fund	2018
MOCA Educator for Family & Children's Programs Endowment	2015
Helen Morse Women's Giving Alliance Endowment	2021
Linda Crank Moseley Women's Giving Alliance Endowment	2021
Sherry Murray Women's Giving Alliance Endowment Fund	2010
Nassau County Council on Aging Building Fund	2014
Joan W. Newton Women's Giving Alliance Endowment	2013
Frank V. Oliver, Jr. Fund for Putnam County Bread of Life	2010
Frank V. Oliver, Jr. Fund for Putnam County Gator Club	2010
Frank V. Oliver, Jr. Fund for Putnam County Humane Society	2010
Frank V. Oliver, Jr. Fund for Rodeheaver Boys Ranch, Inc.	2010
Frank V. Oliver, Jr. Fund for St. Johns River State College	2010
Frank V. Oliver, Jr. Fund for Putnam County Elfs for Kids	2010
One Blood Designated Fund	2020
One Jax Endowment	2007
PACE Center for Girls Jacksonville Endowment	2007
Sallyn S. Pajcic Women's Giving Alliance Endowment	2015
Maureen Kingsley Paschke Women's Giving Alliance Endowment	2020
Kelly L. Pietan Women's Giving Alliance Endowment	2021
Mary F. Pietan Women's Giving Alliance Endowment	2016
Quigley House Endowment	2007
Lynne Stephenson Raiser Women's Giving Alliance Endowment	2020
Richard A. Reid / First Guaranty Memorial Fund	2002
Charles & Louise Rickman Endowment for the Salvation Army	2017
Dr. Charles A. & Dr. Louise Rickman Scholarship Fund	2017
Robert E. Lee High School Alumni Association Fund	2010
Susan Lutton Rodgers Women's Giving Alliance Endowment	2019
Ronald McDonald House Endowment	2007
Kim Rutkowski Women's Giving Alliance Endowment	2013
Susan Remmer Ryzewic Women's Giving Alliance Endowment	2010
Scenic Jacksonville Endowment to Protect & Enhance Scenic	2017
Susan West Schantz Women's Giving Alliance Endowment	2017
Peggy Schiffers Women's Giving Alliance Endowment	2017
Seaton-Donahue Education Fund	2020
A. L. & Ruth S. Shantz Trust	1981
Robert T. & Carol R. Shircliff Charitable Endowment	1988
Helen Short Women's Giving Alliance Endowment	2011
Laine S. Silverfield Women's Giving Alliance Endowment	2012
Ann H. Sims Women's Giving Alliance Endowment	2015



*that leaves
its mark on the
world...*

Skinner Family Designated Endowment Fund	2020
Harold K. Smith Charitable Fund for Designated Grants	2007
Harold K. Smith Playhouse Endowment	1995
The Somebody Cares Fund	2015
St. Vincent's Clay County Women & Infants Pavilion Endowment	2015
David A. Stein Arc Village Endowment	2014
Linda B. Stein Women's Giving Alliance Endowment	2013
Fiona L. Strathern Women's Giving Alliance Endowment	2021
I. M. Sulzbacher Center for the Homeless Endowment	2007
I.M. & Hazel J. Sulzbacher Endowment for the I.M. Sulzbacher Center	2004
Julia Taylor Women's Giving Alliance Endowment	2010
The Community Foundation for Northeast Florida Operations Endowment	2013
Marion E. Tischler Women's Giving Alliance Endowment	2013
Sharon L. Topinka Memorial Fund	2020
John D. & Mary Jane Uible Endowment for Jacksonville Symphony	2018
John D. & Mary Jane Uible Endowment/MOSH	1998
John D. & Mary Jane Uible Endowment/Ronald McDonald House	1998
Mary Elizabeth Uible Morris Unrestricted Endowment/Bolles	2000
Joan A. Van Vleck Justice for Girls Endowment	2017
Joan Amery Van Vleck Fellowship Fund	2011
Joan Amery Van Vleck Women's Giving Alliance Endowment	2010
George Varn Endowment for the Museum of Science & History	1993
Brenda B. Verbeck Women's Giving Alliance Endowment	2021
Joe Vijuk Fund	2016
Volunteers in Medicine Endowment	2007
Dori Walton Women's Giving Alliance Endowment	2017
Linda W. Watkins Women's Giving Alliance Endowment	2021
Cornelia & Olin Watts Endowment Fund	2000
We Care Jacksonville Endowment	2007
Delores Barr Weaver Forever Event Fund est. 2015	2014
Delores Barr Weaver Habijax Tiny House Fund	2020
Delores Barr Weaver Heart & Vascular Pavilion Endowment	2021
Delores Barr Weaver Women's Giving Alliance Endowment	2011
Webb Center Endowment	1991
Isadore Weiner Diabetes Assistance Fund	2021
Elaine T. Weistock Women's Giving Alliance Endowment	2021
Carol J. Weldon Women's Giving Alliance Endowment	2015
Wells Fargo Scholarship Fund	2000
Barbara C. Wenger Women's Giving Alliance Endowment	2015
Tracey Westbrook Women's Giving Alliance Endowment	2013
The Clara White Mission, Inc. Endowment Fund	2006
The Endowment for Clara White Mission	2007
Courtenay Sands Wilson Women's Giving Alliance Endowment	2021
Jay T. & Ruth Lucile Winn Endowment	2011
Ellen A. Wiss Women's Giving Alliance Endowment	2015

The Endowment for WJCT	2007
WJCT Lifelong Learning Legacy Endowment	2016
Women's Center of Jacksonville Endowment	2007
Anonymous	2017
Anonymous	2017

ADVISED FUNDS

Create a charitable account which allows individuals or families to recommend grants to the nonprofit organizations, schools & religious institutions of their choosing.

Abdullah Family Endowment	2014
Abdullah Family Foundation Fund	2014
Abram Family Fund	2017
Norm & Ann Anderson Family Fund	2013
G. Turner Ashby Memorial Fund	2006
Atkerson Family Fund	2001
The Azalea Fund	2007
Tristyn Bailey Memorial Fund	2021
Bailys/Rein Family Charitable Fund	2005
Baker Family Advised Fund	2014
Ann McDonald Baker Family Foundation	2003
Anne & John Baker Family Fund	2016
Ken & Fran Baker Charitable Fund	2021
Martha & Tom Baker Family Fund	2013
Robert B. Baker Advised Fund	2016
Ball Family Fund	1998
Christopher & Elizabeth Ball Advised Fund	2008
Hilton & Butler Ball Charitable Fund	2008
Sarah Ball Advised Fund	2009
Norma S. & Hayes Basford Advised Fund	1998
Beaches Community Fund	2015
L. Andrew & Janie S. Bell Fund	1995
Bitterli Charitable Fund	2018
Blaudow Family Fund	2016
Missy & Roland Boney Family Fund	2015
Buford L. Bowen Charitable Fund	2013
Mary & Bruce Bower Advised Fund	2019
Miller Bower Family Trust	1997
Doug & Kimberly Brady Family Fund	2021
Caroline O. Brinton Charitable Fund	2016
Caroline O. Brinton Family Endowment	2008
William D. & Catherine O. Brinton Advised Fund	1997
Leslie & Sol Brotman Fund	2001
J.F. Bryan, IV Fund	1996
J.F. Bryan, IV Endowment Fund	1995

Tom Bush Family Foundation Fund	2021
Hugh & Caterina Caron Family Fund	2019
Doris N. Carson Foundation for Family Planning & Women's Health	1992
Jean Claude & Nicole Casavant Fund	2021
Arch W. & Lo B. Cassidy Advised Fund	1993
Cellar Family Foundation Fund	1997
The Chartrand Family Fund	2013
Gary & Nancy Chartrand Advised Fund	2013
Jeff Chartrand Advised Fund	2010
Ed & MaryAnne Cipperly Seeds of Promise Endowment & Fund	2006
City of Jacksonville Strategic Partnership Fund	2016
Jenny Claggett Fund	2019
Ann H. & Robert M. Clements Fund	2012
Clontz Family Fund	2014
Cloud Family Amazing Fund	2018
Coastal Blood Foundation Charitable Fund	2017
Fran Coker Memorial Educational Fund	2009
Collins Trust Donor Advised Fund	2019
Cox Advised Fund	2019
Cunkle Family Fund	2017
Current Family Advised Fund	2013
A.D. Davis Family Advised Fund / Robert Davis	1994
David & Tammy Davis Advised Fund	2014
Florence N. Davis Family Advised Fund	1995
Robert D. Davis Family Advised Fund	2009
DHM2 Family Charitable Fund	2019
Ed & Susan Doherty Advised Fund	2012
Drake Family Advised Fund	2011
Catherine M. Drompp Charitable Fund	2018
Drummond/Falconetti Charitable Trust	2000
DuBow Family Advised Fund	1997
DuBow Family Endowed Advised Fund	2017
The Jessie Ball duPont Port St. Joe Capacity Building Fund	2007
Duval Motor Company Charitable Fund	2020
Edelman Family Advised Fund	2007
Egan Family Advised Fund	2019
Eternal Difference Foundation Fund	2008
A. Ross & Cora B. Evans Advised Fund	1998
Eveleigh Trust Fund	2003
Dr. Ronald P. Evens Fund	2003
Every Little Bit Fund	2017
Fisher Family Fund	2021
Michael W. & Linda M. Fisher Advised Fund	2003
Flagler Family Fund	2021
Florida Blue Community Fund	2002
Ginger & Gregory Forbes Charitable Foundation Fund	2005
David & Bonnie Foster Advised Fund	2008

GIVING FORWARD

is about so much more than money.

Take Miss Carrie Johnson, a fixture in St. Augustine's Lincolnville neighborhood for decades. She helped everyone she could, but was an especially strong advocate for elders and homeless children. She was always in motion, raising money and lifting spirits as she greeted residents and tourists from the seat of her three-wheeled bicycle that she called her 'three-wheeled Lamborghini.' Her acts of loving kindness and compassion were legendary, and when she died in 2018, St. Augustine honored her by renaming the street where she lived 'Carrie Johnson Way.'

Miss Carrie

Where We Stand

Lenny Foster, 2021 Art Ventures grantee
Pigment print on cotton rag paper

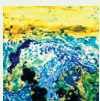


Frankland Family Charitable Fund	2014	Anne & Charlie Joseph Family Fund	2019	Tom Nehl Truck Company Fund	2020
FRANN Fund	2019	KAIROS Advised Fund	2017	Neil Neighborhood House Auxiliary of St. Augustine, Fl	
Ralph K. Frasier & Jeannine M. Quick-Frasier Advised Fund	2012	Matthew & Alexis Kane Family Fund	2014	Advised Fund	2009
Meredith & Mark Frisch Advised Fund	2011	Lawrence & Kathy Kanter Advised Fund	2018	Noyes Family Fund	2017
Furyk Foundation Fund	2021	Morton A. & Delores Kesler Foundation	1998	Ray O'Steen Fund	2019
Geddes Family Advised Fund	2013	Krosnick Family Charitable Fund	2000	The Ottenstroer Charitable Trust	1993
Gen W Now Fund	2013	Krueger Family Charitable Fund	1994	Duane L. Ottenstroer Charitable Fund	1994
Girls with Curls Fund	2019	Mr. & Mrs. Anthony S. Kurlas Family Advised Fund	2011	Janet G. Owens Neighborhood Engagement & Community Development Memorial Fund	2020
Sheriff Nat Glover Endowment	1995	Mr. & Mrs. Anthony S. Kurlas Family Endowment	2011	Jeffrey Owens Charitable Fund	2018
GO Initiative Fund	2018	Henri Landwirth & Family Advised Fund	2019	John O. Parrish & Davy Mudd Parrish Advised Fund	2015
Golden Family Fund	2019	Henri Landwirth Family Advised Fund	2019	Deborah Pass Durham Fund	2013
Margaret Gomez Advised Fund	2012	Henri Landwirth Family Endowed Fund	2018	Paul Perez Advised Fund	2011
The Gooding-Bell Endowment	2005	Lane Family Endowment	2016	Petway Family Foundation Fund	2015
The Henry & Lucy Gooding Endowment	2004	Lee Family Fund	2015	Phanstiel Family Advised Fund	2007
Alex Graham Advised Endowment	2016	Leland & Larson Charitable Fund	2018	David L. & Deborah P. Pierson Advised Fund	1996
Alex Graham Advised Fund	2016	LGBTQ Community Fund for Northeast Florida	2013	Jerry & Mary Pietan Family Fund	2021
C & H Graham Family Fund	2013	Allen & Sharon Lennon Advised Fund	2012	Poli Family Foundation Fund	2008
Iva & Gene Gray Memorial Endowment	2000	Debbie Liles Memorial Fund	2017	Price Family Advised Fund	2007
Michael & Eileen Grebe Advised Fund	2016	Loeb Family Fund	2017	The Putnam Village Fund	2021
Renee Haas & John W. Westman Charitable Fund	2004	Benjamin William Lowe, Jr. Memorial Scholarship Fund	2007	Deborah Hicks Quazzo Charitable Fund	2012
Harbison Family Fund	2018	Julia Munroe McArthur Charitable Foundation	1992	Ramsey Family Fund	2020
Danielle Hardner Advised Fund	2011	McCaleb Family Foundation Fund	2016	RS&H Elevate Fund	2018
Harrell Family Fund	2017	Martha McCarthy Advised Fund	2017	RTJC Hogan Family Fund	2019
Ann C. & Martin S. Harrell Family Fund	2017	Ashley Ann McGehee Fund	2020	Lloyd & Maureen Regas Charitable Fund	2020
Hugh & Glenda Harris Donor Advised Fund	2020	Charles C. & Scott L. McGehee Fund	2006	Reinhold Family Foundation Matching Gift Program	2012
Preston Haskell Fund	2017	Courtney L. McGehee Charitable Fund	2020	Remmer Ryzewicz Advised Fund	2007
Hatcher Endowment	1991	David S. McGehee Family Fund	2019	C. Daniel & Julie F. Rice Donor Advised Fund	2004
Jonathan & Teresa Hay Family Fund	2018	Mac & Terri McGehee Fund	1987	The Charles E. & Dianne T. Rice Family Donor Advised Fund	2008
Robert W. & Lindsay D. Helms Advised Fund	2000	Mackenzie Rives McGehee Fund	2020	Scott & Heather Riley Family Fund	2020
Henderson & Baughman Family Fund	2019	Sutton & Debbie McGehee Advised Fund	2013	Steve & Dotty Risley Foundation	1999
Hernon-Garro Charitable Advised Fund	2017	Tom & Janna McNicholas Donor Advised Fund	2019	Riverside Hospital Foundation Charitable Fund	1993
Reedy & Philip Hickey Advised Fund	2011	Marc & Anne Mayo Charitable Fund	2020	Michael & Tance Roberts Advised Fund	2020
William J. Hicklin, Jr. Advised Fund	1994	George & Gayle Mediill Family Advised Fund	2019	Charlotte Haynes Robuck Endowment Fund	1998
Hicks Family Charitable Fund	2019	Merrill Lynch Employees' Philanthropic Endowment	2012	The Rogaski Family Advised Fund	2011
Melinda Hicks Jenkins Fund	2018	Merrill Lynch Employees' Philanthropic Fund	2010	Rogers Towers Charitable Fund	2004
Katherine C. Hill Fund	2017	Meyers-Labenz Family Charitable Fund	2016	Jamie Rood Advised Fund	2019
R. Marshall Hill Fund	2017	David C. Miller Fund	2018	Rosenberg Family Fund	2021
Robert & Margaret Hill Advised Fund	2011	David & Monique Miller Family Fund	2015	Liz Rosenfeld Legacy Fund	2012
Brad & Rania Hilton Charitable Fund	2018	Michael & Glenn Miller Family Fund	2016	Gregory S. & Susan K. Roth Fund	2016
Cara & David C. Hodges, Jr. Endowed Family Fund	2017	John & Anita Mitchell Family Fund	2017	Rowe Family Charitable Fund	2014
Bruce & Judy Homeyer Charitable Fund	2003	James & Anne Moseley Advised Fund	1999	Rueger Family Fund	2017
Bruce & Judy Homeyer Fund for Excellence in Nursing	2013	Gregory Mullins Advised Fund	2017	San Martin Family Advised Fund	2007
David & Jan Howard Charitable Fund	2018	Jeffery Mullins Advised Fund	2017	Ryan A. Schwartz Advised Fund	2009
Howell Family Endowment	2010	Mark & Judy Mullins Advised Fund	2016	Henry & Betty Seissler Memorial Fund	2007
Ashton & Amanda Hudson Family Charitable Fund	2018	Murray Family Gift Fund	2014	Benjamin & Melanie Setzer Family Fund	2017
Charles Hyman & Janet Healy Family Fund	1999	My Village Project Community Fund	2015	Debra Setzer Fund	2016
Matt & Amanda Jackson Fund	2019	Evelyn H. Nehl Fund in Memory of John Steven (Jackson) Hughes	2000	Setzer L'dor V'dor Fund	2017
Jacksonville Equity & Placemaking Advised Fund	2020	Tom Nehl Fund	1993	Sharkey Family Fund	2016
Jennifer's Hope Fund	2012				



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and creativity
compound...*





Blair Sisisky Sherman Fund	2016
Silverfield Family Fund	2012
Sisisky Family Foundation Fund	1998
Richard G. & Ann F. Skinner Advised Fund	1981
Richard G. Skinner, Jr. & Ann F. Skinner Family Endowment Fund	2019
Patricia M. Houlihan & Richard G. Skinner, III Fund	1998
Chris & Kirsten Sorensen Fund	2021
Robin & Tabitha Sorensen Advised Fund	2019
St. Johns Neighbors Fund	2020
St. Johns Terrace Home Advised Fund	2016
Bobby & Polly Family Fund	2021
Brooke & Hap Stein Advised Fund	1997
David A. Stein Charitable Trust	1993
Linda & Colley Stowell Charitable Fund	2019
Beth Jarman Sumner Family Foundation Fund	2004
Super Heroes 4 Mason Fund	2018
The Anne Elizabeth Suratt Advised Fund	2000
John S. & Kristen L. Surface Charitable Fund	2016
John C. & Julia W. Taylor Advised Fund	2017
Taylor Family Fund	2021
Three Fund	2003
Thompson Family Charitable Fund	2020
Towe Family Fund	2021
Susan & Jim Towler Charitable Fund	2004
Brent & Alison Trager Family Fund	2017
James C. & Diane M. Treat Advised Fund	2021
Tremonti Charitable Fund	1994
Doug & Paige Tutwiler Advised Fund	2016
John D. & Mary Jane Uible Foundation	1989
Glenn & Lisa Ullmann Advised Fund	2016
Frank D. Upchurch, III & Katherine Upchurch Fund	2013
Kendall Sisisky Valliere Fund	2016
The Jim & Joan Van Vleck Family Advised Fund	1998
George & Mary Elizabeth Varn Charitable Fund	1978
W. Lester & Marjorie Varn Charitable Fund	1978
David Garrison & Terri Tally Venters Fund	2019
The Ralph N. Walter & Anina M. Walter Charitable Trust	1991
Theodora D. & William H. Walton, III Advised Fund	2012
The Warwick Fund	2021
Alfonzo G. Washington, Sr., African-American Leadership Fund	2004
Jerry D. Watson Fund	2021
Mary V. & Frank C. Watson Advised Fund	1999
Delores Barr Weaver Family Endowment Fund 1	2019
Delores Barr Weaver Family Endowment Fund 2	2019
Delores Barr Weaver Family Endowment Fund 3	2019
Delores Barr Weaver Legacy Fund	2015
Delores Barr Weaver TCF Staff Giving Fund Endowment	2020

J. Wayne Weaver Fund	2020
Weaver Family Endowed Advised Fund 1	2019
Weaver Family Endowed Advised Fund 2	2019
Weaver Family Endowed Advised Fund 3	2019
Weaver Philanthropic Initiative Fund	1999
Klaus & Barbara C. Wenger Family Fund	2021
Tracey Westbrook Family Advised Fund	2009
Margaret & Putt Wetherbee Family Fund	2015
Eartha M.M. White Charitable Fund	2003
Eartha M.M. White Legacy Fund	2004
MaryEllen Willis Fund	2017
Winston Family Fund	2019
Ellen & James Wiss Family Fund	2019
Womens' Giving Alliance	2002
Chris Wood Family Advised Fund	2009
YellowDog Advised Fund	2010
Cynthia Zarsky Advised Fund	2017
Karen & John Zell Charitable Fund	2017
Zimmerman Family Fund	2019
Anonymous	2010
Anonymous	2012
Anonymous	2018
Anonymous	2018

AWARDS & SCHOLARSHIP FUNDS

Help current & future students pursue education, professional development or other educational enrichment opportunities.

Award Funds

Independent Life C.G. Snead/J.F. Bryan, III Memorial Award	1996
Thad M. Moseley Endowment for Surgical Teaching	1996
USS Monterey Fund	1990

Scholarship Funds

Virginia "Ginger" Ackerman Scholarship Fund	2021
William Walker & John W. (Train) Anderson Scholarship Fund	1980
Willard O. Ash Endowment Fund	1994
Leslie Baker Memorial Endowment	1998
George Ballis Scholarship Endowment	2005
Talen Charles Birt Memorial Fund	2021
Bryan-Gooding Bethune Cookman Nursing Scholarship Endowment	2010
George & Dottie Dorion Scholarship Fund for Bacardi Jacksonville	2017

Jo & Paul Gallagher Family Endowment	2014
Zoe Gaudet Scholarship Fund	2006
John Hellbach Memorial Fund	2010
William O. & Elizabeth G. Inman Scholarship	1989
Cole Kelley Scholarship Fund	2020
Dick & Becky Kocerha JAGA Scholarship Fund	2018
Kraft/Moore Family Scholarship Fund	1993
Erica Lewis, Esq. Soccer Scholarship Fund	2015
Dr. Linda McLucas Fisher Scholarship Fund	2017
Leonard Lee & Margaret Cox McLucas Athletic & Scholar Award	1991
Talona Mae & Fred William Melber Episcopal Scholarship Fund	2005
Byon M. Morris Charitable Fund II	1992
Emily B. Paulk Scholarship Fund	1992
Sam & Lydia Payne Scholarship Fund	2014
James Thomas Pickren Memorial Scholarship Fund	2002
The Dorothea B. Shaw Scholarship Fund	2007
Craig Speziale Memorial Scholarship	2014
St. Mark's Episcopal Day School Scholarship Fund	1989
Gabe B. Summers Scholarship Fund	1993
The Anina M. Walter Scholarship Fund	1993
Nan Parker Williams Scholarship Fund	2008
Burgman Winston Youth Orchestra Scholarship Fund	2004
Winston Family YMCA Campership Endowment	2007
Bernie G. Yvon Memorial Fund	2015

SUWANNEE VALLEY COMMUNITY FOUNDATION

An affiliate fund of The Community Foundation for Northeast Florida, comprised of Columbia, Hamilton, Lafayette, Suwannee & Union counties. It is governed by a local advisory board.

Helen Davis Brown Endowment Fund	2009
Campbell Park Endowment	2006
Columbia County Senior Services, Inc. Endowment Fund	2011
First Federal Bank of Florida Charitable Fund	2017
Robert & Elizabeth Haven Fund	2010
Gladys L. Kirkland Endowment Fund	2016
James H. Montgomery Charitable Fund	2006
James H. Montgomery Suwannee Valley Endowment	2004
Joseph N. Persons Charitable Fund	2019
Marion C. Persons Charitable Fund	2003
Marion Carson Persons Charitable Fund	2007
Suwannee Valley Community Foundation Unrestricted Endowment	2005



Back row, left to right: Michael DuBow, Buddy Schulz, George Egan, Ryan Schwartz, Dori Walton, Julia Taylor, Robert Hill, Jr., Dr. Solomon G. Brotman, Velma Monteiro-Tribble
Front row: Carol Alexander, Richard L. Sisisky, Martha Frye Baker, Chair, the Honorable Brian J. Davis, Chair-Elect, Michael Meyers, Barbara Harrell

The Community Foundation for Northeast Florida's

2021 Board of Trustees

The Community Foundation's Board of Trustees members generously volunteer their time and talents to ensure that The Community Foundation grows and prospers so that Northeast Florida can benefit forever. The full Board meets four times a year and the Audit, Finance, Investment, Governance, Program & Initiatives, and Program Related Investments committees meet at least quarterly as well.

Board Committees

- ◆ **Audit**
- ◆ **Finance**
- ◆ **Investment**
- ◆ **Governance**
- ◆ **Programs & Initiatives**
- ◆ **Program Related Investments (PRI)**

Carol Alexander | Community Volunteer | ◆
Martha Frye Baker | Community Volunteer | Chair of the Board | ◆◆◆
Dr. Solomon G. Brotman | General Dentist | ◆◆ (Chair)
The Honorable Brian J. Davis | U.S. District Court Judge | Chair-Elect | ◆◆
Michael DuBow | DuBow Family Foundation | ◆◆ (Chair)
George Egan | President & CEO, Reinhold Corporation | ◆◆
Barbara Harrell | Community Volunteer | ◆
Robert Hill, Jr. | Community Volunteer | ◆◆ (Chair)
Michael Meyers | Community Volunteer/Attorney | ◆◆
Buddy Schulz | Retired Partner, Holland & Knight | ◆
Ryan A. Schwartz | CEO, Patronus Medical | ◆◆◆ (Chair)
Richard L. Sisisky | President/Owner, The Shircliff & Sisisky Company | ◆◆◆
Julia Taylor | Community Volunteer | ◆ (Chair)
Dori Walton | Community Volunteer/Former Investment Banker | ◆◆ (Chair)
Velma Monteiro-Tribble | Senior Director, Florida Blue Foundation | ◆

Other Committee Members

Deborah Pass Durham (Past Board Chair) | ◆◆
David Gonino (Community Member) | ◆
Wilford Lyon (Former Trustee) | ◆
Peter Reynolds (Community Member) | ◆
Dan Rice (Past Board Chair) | ◆
Lauren Rueger (Community Member) | ◆
Susan Remmer Ryzewic (Former Trustee) | ◆
James Van Vleck (Former Trustee) | ◆



in the culmination
of people and
passion.



Meet the Staff of 23 at The Community Foundation

Between us, we have nearly 180 years of experience here at The Community Foundation and are always seeking ways to better serve our donors and our larger community. For more information about individual staff members, go to www.jaxcf.org/staff.



Building partnerships that champion the greater good. That's what powers
GIVING FORWARD.



Back row, left to right: **Joanne Cohen**, J.D., VP, Philanthropic Services; **Amy Crane**, Senior Director, Programs; **Brandon Anderson**, Grants Specialist; **Erin Broderick**, MBA, Senior Finance Manager; **James Coggin**, MBA, Senior Program Director
Front row: **Janet Allen**, Program Officer; **Tom Caron**, Director, Donor Services; **Reagan Bass**, Program Associate



Back row, left to right: **Sally Pettegrew**, Executive Assistant to the President; **Amber Jubinsky**, MAcc; Senior Accounting Manager; **Mark LeMaire**, M.A., Senior Program Director; **Carol Nieves**, Senior Gift Specialist
Front row: **Yan Cumper**, CPA, Accounting Manager; **Susan Datz Edelman**, VP, Strategic Communications; **Katie Higginbotham**, Digital Communications Associate



Back row, left to right: **Latrice Wright**, Office Manager; **Kathleen Shaw**, M.Ed., VP, Programs; **John Zell**, CAP®, VP, Development; **Nina Waters**, President; **Tyson Schmick**, Information Systems Manager
Front row: **Grace Sacerdote**, CPA, Executive Vice President, CFO; **Kacie Smyth**, Director, Women's Giving Alliance; **Kirsten Wright**, Donor Services Specialist

2021 FINANCIAL SUMMARY

Summary Audited Statements

Financial Position *as of December 31, 2021 & 2020*

Assets	2021	2020
Cash & cash equivalents	\$45,113,950	\$50,124,408
Investments	556,630,202	479,995,324
Other assets	28,622,935	20,202,351
TOTAL	\$630,367,087	\$550,322,083

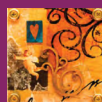
Liabilities & Net Assets	2021	2020
Current liabilities	\$5,276,490	\$7,898,621
Funds held as agency endowments	20,264,088	15,620,295
Foundation net assets	604,826,509	526,803,167
TOTAL	\$630,367,087	\$550,322,083

Activities *for the years ended December 31, 2021 & 2020*

Revenue & Support	2021	2020
Gifts received	\$60,691,822	\$59,193,995
Net investment returns	61,096,989	64,075,882
Other	1,416,889	1,453,965
TOTAL	\$123,205,700	\$124,723,842

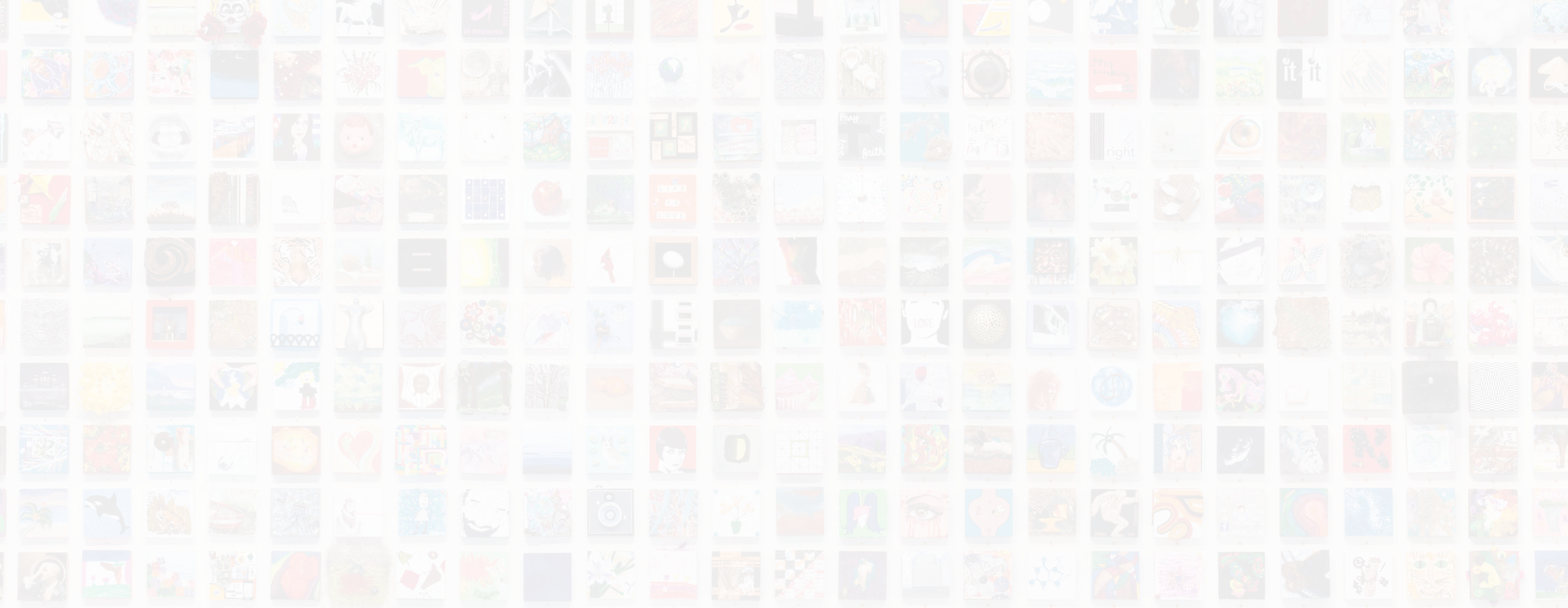
Grants & Expenses	2021	2020
Grants awarded & programs	\$41,496,808	\$48,362,466
Support services	3,685,550	3,357,800
TOTAL	\$45,182,358	\$51,720,266

Change in Net Assets	2021	2020
NET ACTIVITY	\$78,023,342	\$73,003,576



That's the Power of
GIVING FORWARD.





THE COMMUNITY
FOUNDATION
FOR NORTHEAST FLORIDA

Giving Back. Giving Forward.

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