



FALL
2024

A newsletter for
donors, friends
& the Northeast
Florida community

FOREVER FORWARD

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When people think of me, I hope they will remember me as a man who was passionate about Jacksonville. I hope that what they recall is that I made a difference.



Celebrating the Legacy of DAVID A. STEIN

David A. Stein was a trailblazing philanthropist who led by example. He was often the first to give, and the first to ask others to join him. He embraced causes such as the Jewish Community Alliance, for which he established an endowment at The Community Foundation, along with Greenwood School and The Arc Jacksonville, which are also endowed thanks to his generosity. To memorialize his legacy, some of his closest friends and fellow philanthropists shared their remembrances of David.

Wayne Weaver, Friend & Philanthropist

David Stein's philanthropic approach came from his love of community and his lively personality. He not only gave funds to a large number of nonprofits, but he was also personally involved with the recipients and organizations he cared so much about.

Gary Chartrand, Friend & Philanthropist

David Stein invested in causes he believed in, but most importantly, he invested in the people that were responsible for executing the plan.

We were having lunch after a round of golf one day and got talking about education reform. We agreed to partner on a project, and we raised about \$40M for the Quality Education for All Fund at The Community Foundation. We worked with Superintendent Dr. Nikkolai Vitti and Duval County Public Schools on several initiatives to improve education.

The community is so much better off because David's philosophy was to give back to the community where he made his money. That's what he did!

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THE COMMUNITY
FOUNDATION

— FOR NORTHEAST FLORIDA —

60 YEARS OF GIVING BACK

Forever Forward

jaxcf.org

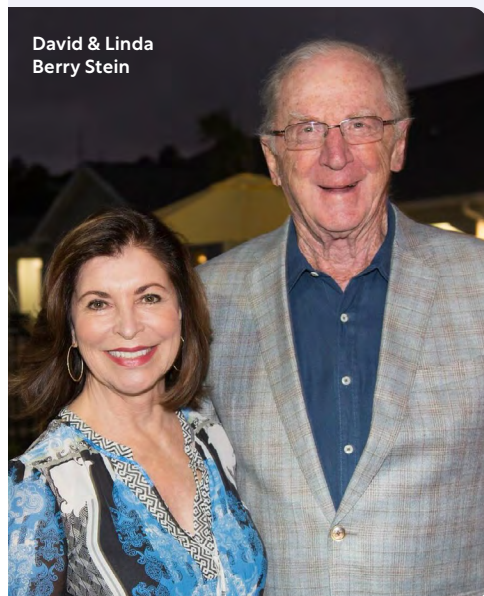
Cindy Edelman,
Friend & Philanthropist

David's impact on our community was immeasurable; in particular his and Linda's philanthropic gifts to young people, whether encompassing leadership development, like the Stein Fellows at United Way, the Stein Scholars at JU and UNF, or young artists at Cathedral Arts Project. What distinguished David, though, were the interactions he had with his fellows and scholars. He sincerely loved them, interacting with them and watching them grow.

When I reflect on the why of the QEA Fund, I recall David sharing his motivation:

“This community has been so good to us that we should show our appreciation.”

That was vintage David, a man who dreamed big, possessed a huge heart and changed the Jacksonville landscape for the better. We all miss him terribly.



David & Linda
Berry Stein

Nina Waters,
Friend & Philanthropist

David's remarkable generosity went hand-in-hand with his passion for encouraging others to give to organizations they cared about during their lifetime, rather than after their deaths. He absolutely radiated joy when he was able to make a significant gift, and he urged others to have that experience with their philanthropy. He simply didn't want to miss a minute of seeing the change it made or would make for a beloved organization.



Adam Chaskin,
CEO, Jewish Community Alliance

For over 35 years, David nurtured, served and delighted in the successes of the Jewish Community Alliance that now bears his name. Through his immense generosity and forethought, the JCA Endowment at The Community Foundation continues to provide vital support to the JCA mission each year. From strengthening Jewish life, to serving as the common meeting ground, to enhancing the quality of life of the entire community, this fund ensures that David's legacy will continue to impact our community for generations to come.

Dan Edelman,
Friend & Philanthropist

David believed deeply in giving back to the community and helping others. Almost all of his giving was focused on Jacksonville and on educating, mentoring and providing a better quality of life for others. When David was in his prime years of fundraising, I would get a call out of the blue from David about every three or four months and it would go like this: "Dan, I am on my way to meet with so-and-so. Has the income tax or estate tax changed? If they have a retirement plan, can I still tell them that if they pass away 70 percent is going to go to the IRS?..."

“How in the world can they say no to me?”

Richard Sisisky,
Friend & Philanthropist

I moved here as Bob Shircliff's partner at just 33 years old and I didn't know anyone. David was a legend to me. He called me up one day and invited me to lunch in the Gulf Life building. He was so supportive of me as a new young person in the community, and very encouraging. No one was more joyful giving their money away than David. The example set by his parents, who founded River Garden, filtered down to him and he lived by the Jewish principle of Tikkun Olam, to repair the world. To David, giving back and leading others to charity was its own mitzvah. He was a happy giver. In fact, he was gleeful about it. If you thought he might be asking you for too much money he would say, brushing his shoulder, 'it's just dandruff.'

Jacqueline Herman,
Head of Greenwood School

David's legacy is reflected in each student and family who enters our community. Current families and alumni have expressed their gratitude for their Greenwood education, and we are in turn grateful for David's vision and generosity. Thanks to him, Greenwood School has educated, supported, and positively impacted the lives of students and their families for over 38 years.

Charles Zimmerman,
Friend & Philanthropist

David and I go back a long way, to 9 or 10 years old. We were apart for about 30 years, and then we got back together because he found out I could give him some money. I've never seen anybody so driven to give away money to almost everything. He was a philanthropist and so much more. He was probably the best friend I ever had.

Kari Bates, President & CEO,
The Arc Jacksonville

We are deeply grateful for the enduring legacy of David A. Stein. His generosity, through the David A. Stein Arc Village Endowment established in 2016, ensures that individuals with intellectual and developmental differences can continue living independently at The Arc Jacksonville Village for years to come. This fund specifically supports residents facing financial challenges, empowering them to maintain their independence and thrive in a community that values their dignity and potential.

Laurie DuBow,
Friend & Philanthropist

There was the "David Stein Way," which was unique and one-of-a-kind. David never had a hidden agenda. He was sincere, honest and persuasive when it came to philanthropic causes that were critical for our community. His approach was simple:

“This is the goal and we have to get it done... and I need your support to get us there.”

Our community benefited greatly from the David Stein Way, as the fingerprints of his hard work and commitment are found throughout so many philanthropic initiatives in our region.

To David A. Stein

CONNECTING ACROSS DIFFERENCES, in Divided Times



A CONVERSATION
WITH JOHN INAZU

John Inazu is the Sally D. Danforth Distinguished Professor of Law and Religion at Washington University in St Louis. His latest book is "Learning to Disagree: The Surprising Path to Navigating Differences with Empathy and Respect." Inazu spoke at Donors Forum in September, and continued the conversation with Wanda Willis, VP of Civic Leadership, on our podcast, Forever Forward – available wherever podcasts are found. Here is an excerpt.



Q: How did you become interested in differences, disagreement and pluralism?

A: In some ways, I think my entire life has been preparation for working across disagreement. I'm half Japanese, but grew up in largely white cultures. I went to Duke and then UNC Chapel Hill, where I was an extreme minority. I was in the military, but also influenced by a pacifist theologian. As a lawyer, I believe that legal training is a great way to understand difference, to understand the other side at its best, rather than at its worst.

Q: You use the words "PLURALISM" and "CONFIDENT PLURALISM" frequently. What do these terms mean?

A: It's just a fact of the world that we have lots of deep differences over things that matter, not just over small things, like ice cream flavors and sports teams, but over fundamental questions like the purpose of a human being or the nature of human flourishing. And when you have those deep differences, this creates the fact of pluralism, and that creates a political problem. How do you live together with people who hold such different views about the nature of reality and the importance of living together in society? When encountering the difference, you could say, "I'm going to try to win at all costs and control," or you could say, "I'm going to leave and be with my people." Or you could say, "I'm going to figure out how to engage across this difference." And that's what I call "confident pluralism."

Q: At The Community Foundation, we work with donors who have different interests, but a common concern for the local community. How does pluralism connect to this work?

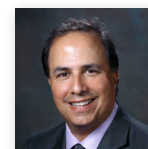
A: At the local level, especially, it's really important to have institutions and people who can connect and convene in order to pool resources and to activate networks that are required to solve some of society's deepest problems. Your constituents focus on different issues, and some of them, as individuals, will be supporting efforts that are antithetical with one another. But as an institution, you can still name an overlap or a shared consensus. There are enough social problems to tackle at the local level that you should be able to find lots of common ground where you can work together, even across your differences. You don't have to use this institution or these opportunities to work out all of your deepest disagreements. You can say we care about this city, we care about this region, and here are some very practical ways where we can activate networks and resources to get things done.



LEADERSHIP SPOTLIGHT

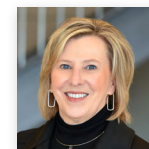
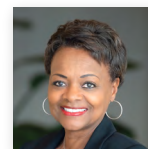
2024 BOARD OF TRUSTEES:

This year, The Community Foundation welcomed three new trustees: John Hirabayashi, John Peyton, and Amy Wacaster. Michael DuBow began his term as chair of the board in January. (Pictured below, top row, left to right.)



STAFF UPDATES:

Mark LeMaire returned to The Community Foundation in a new position, VP of Strategic Donor Initiatives. Wanda Willis was selected for the Executive Leadership Institute with CFLeads, a national organization dedicated to supporting community leadership by community foundations. Amy Crane was promoted to VP of Programs. (Pictured right, bottom row, left to right.)



Making the Most of Our Wonderful Waterways

Water is ubiquitous in Northeast Florida. From the rivers, to the pool, to the Atlantic Ocean, the water represents the joy and beauty of our region, as well as the occasional hazard that comes with living in the subtropical lowlands. As summer fades into a memory, we're taking a look at recent grants that are helping people across our region make the most of our wonderful waterways.

- 1 Surfear Negra
- 2 St. Johns Riverkeeper
- 3 Shawn D. Delifus Foundation
- 4 Spectrum Sailing
- 5 Putnam County Parks & Recreation

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Given we are in Florida, and there is a beach, lake or river everywhere you go, teaching water safety at an early age is very important. We had a few instances where families in the past were only able to sign up one of their children due to financial limitations. Now, with this grant, many families were able to sign up all of their kids.

— Tyler McDaniel, Recreation Manager at Putnam County Parks & Recreation

ST. JOHNS RIVERKEEPER

SPECTRUM SAILING

PUTNAM COUNTY PARKS & RECREATION



Surfear Negra

This Jacksonville-based nonprofit works to “diversify the line-up,” bringing girls of color, who are underrepresented in surfing, to discover the joy of the sport. In 2023, Surfear Negra received a \$2,500 small organization grant to support the Summer 2023 “Come to the Water” surf camp for 20 girls.



“Surfing is a wonderful sport, and any sport that incorporates nature, whether it’s waterways or green spaces, tends to foster healthier people. We want to empower girls to have the opportunity to surf and experience nature.

— Kenya Collins, Director, Surfear Negra



St. Johns Riverkeeper

The Ribault River is a hidden gem in Jacksonville. This tributary of the St. Johns River is located in Northwest Jacksonville, adjacent to Moncrief Creek, and both watersheds have a major impact on the surrounding neighborhoods. This year, St. Johns Riverkeeper received a five-year grant from the Delores Barr Weaver Legacy Funds, providing \$100,000 a year to support projects such as Resilient Ribault project, an initiative with LISC Jacksonville to help people connect to the waterways while also mitigating issues such as flooding.

“St. Johns Riverkeeper represents the entire St. Johns River watershed, an area that spans nearly 9,000 square miles. As a result, our resources and staff are often spread thin. The multi-year Weaver grant has given us the opportunity to concentrate more time and resources into a smaller geographic area over an extended period of time. This allows us to build the trust, relationships, and partnerships that are necessary to identify and address the needs of the community and local waterways and work together towards meaningful solutions that will have a lasting impact.

— Jimmy Orth, Executive Director, St. Johns Riverkeeper

Shawn D. Delifus Foundation

The Delifus Foundation has received multiple grants through The Community Foundation, including a neighborhoods grant, small organization grant, MyVillage Project grant and donor support, over the past few years.

“When Shawn passed away at age 30, the grief was overwhelming because he was my only child. I had to think about what I could do in honor of him. He loved to swim, and he loved to teach swimming, so I established the foundation so that we could teach babies, young children and adults how to swim. Water safety is essential.

— Joyce Delifus, the founder and mother of Shawn Delifus, the youngest and only African American coach in US history to simultaneously coach two winning Olympic gold medalists



Spectrum Sailing

Spectrum Sailing was born out of necessity. Its founder, Scott Herman, was looking for a sailing camp for his son, who is autistic, and couldn’t find a program to take him to. Spectrum Sailing recently expanded to Jacksonville, in partnership with the Florida Yacht Club. This year, Spectrum Sailing received a \$2,500 small organization grant to support a spring break sailing program for neurodivergent youth.



Spectrum Sailing

“Over the past two years, I have seen the impact Spectrum Sailing has had in the local Jacksonville autism community. Our work has touched not only our sailors’ lives, but the lives of the parents, volunteers, instructors and all who work with our camp. Without the support of The Community Foundation, we would not have been able to continue our growth and impact in the autism community.

— Scott Herman, founder, Spectrum Sailing

Putnam County Parks & Recreation

Water is a feature of life even in inland Putnam County. This summer, the Putnam County Parks and Recreation Department received a \$2,000 grant through the Frank V. Oliver Fund to provide swimming lessons to 57 children.



CELEBRATING 60 YEARS OF YOUR GENEROSITY

This April, fundholders gathered to celebrate 60 years of generosity through The Community Foundation.

It was an evening to remember, with a conversation between the three presidents of the Foundation, the Prize for Civic Engagement awarded to Delores Barr Weaver, and a performance by the Ritz Chamber Players. Our thanks go out to all the donors who have chosen to GIVE BACK AND FOREVER FORWARD through The Community Foundation. The sum of our giving is greater than its parts.



Richard Sisisky, Kendall Sisisky Valliere, Kimberly Sisisky, & Dori Walton



Courtenay Wilson & Joe Barton



Sabeen Perwaiz & Cindy Edelman



Susan Smathers, John Ryzewic, Susan Remmer Ryzewic



Linda Raker, John Raker, & Elizabeth Raker



THE COMMUNITY FOUNDATION

— FOR NORTHEAST FLORIDA —

60 YEARS OF GIVING BACK

Forever Forward



Cleve & Pat Warren



Judge Brian J. Davis offers a toast



Alison Buchanan performs with the Ritz Chamber Players



Glenn & Lisa Ullmann





Justine Redding, Floyd Willis, Wanda Willis, & Richard Blackston



Isaiah M. Oliver, Andy Bell, & Nina Waters



Peggy & J.F. Bryan & Neely Towe



Cathy & Caroline Brinton



William Harrell, Barbara Harrell, Michael DuBow, Helen DuBow



Entrice Rowe, Marcus Rowe, Myron Flagler, Lior Spring, Daniel Miller



Carol Alexander & Howard Dodson



Meredith Jespersen, Jimmy Orth, David Miller, Ellen Wiss



Pamela & Ashley Smith



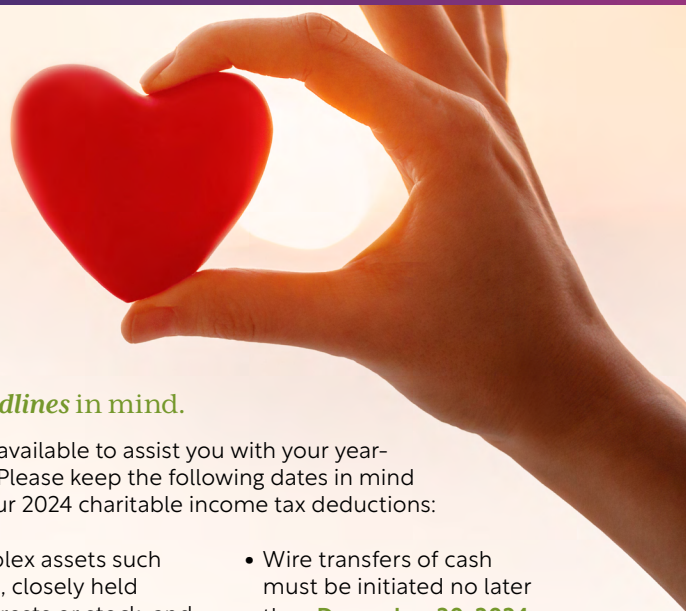
Amy Crane, Julia Taylor, & Grace Sacerdote





End of Year Giving

If the cooler temperatures and busy fall event season are any indication, it's that time of year again. The Community Foundation team is standing by to assist you with your year-end charitable giving. Here are three suggestions to make the season smooth and purposeful for you and your family.



1 Consider a donation of *appreciated stock* to your fund.

Writing a check is an easy way to boost your fund. Giving stock has other advantages. When you give shares of long-term appreciated stock, you can be eligible for a charitable tax deduction at the fair market value of the shares. Then, when The Community Foundation sells the shares and adds the proceeds to your fund, the fund – as part of The Community Foundation, a 501(c)(3) charity – is not hit with capital gains tax. By contrast, if you were to sell those shares and give the proceeds to your fund, you'd have a lot less cash to give to your favorite causes.

2 If you can take advantage of the *QCD*, do it.

A Qualified Charitable Distribution ("QCD") is a very smart way to support charitable causes. If you are over the age of 70 ½, you can direct up to \$105,000 from your IRA to certain charities, including a field-of-interest, designated, unrestricted, or scholarship fund at The Community Foundation. If you're subject to the rules for Required Minimum Distributions (RMDs), QCDs count. Through a QCD, you avoid income tax on the funds distributed to charity.

3 Keep these *end-of-year deadlines* in mind.

We are ready and available to assist you with your year-end giving needs. Please keep the following dates in mind when planning your 2024 charitable income tax deductions:



- Gifts of complex assets such as real estate, closely held business interests or stock, and planned giving vehicles should be discussed with your relationship manager by **Halloween**.
- Gifts of mutual funds should be made by **December 16, 2024**.
- Gifts of appreciated stock should be made by **December 23, 2024**.
- Donor advised fund grant recommendations should be made in the donor portal, Access My Fund, by **December 26, 2024** for grant checks to be postmarked by the end of the year. Timing of grants does not impact charitable income tax donations.
- Wire transfers of cash must be initiated no later than **December 30, 2024**.
- Checks sent via the U.S. Postal Service to The Community Foundation must be postmarked on or before **December 31, 2024**.
- Checks sent via carriers such as FedEx, UPS and DHL must be physically received at The Community Foundation on or before **December 31, 2024**.
- Credit card gifts made by phone must be made no later than 4 p.m. on December 31, 2024; online contributions may be made until midnight.



Whether you are donating liquid or illiquid assets, please contact us at (904) 356-4483 at your earliest convenience and let us help you get your 2024 charitable gifts in order.

John Zell, CAP®, Senior Vice President, Development



**HERE
TO
HELP**

Socrates Rivers, MBA, Development Director at The Community Foundation, recently earned his Chartered Advisor in Philanthropy (CAP) designation as part of our ongoing efforts to help donors achieve their philanthropic goals. The CAP® credential signifies mastery over the financial details involved in different forms of charitable giving, as well as critical interpersonal skills needed to guide clients and donors from philanthropic aspiration to positive impact.

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CHARTERED
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