

50th ANNIVERSARY / EST. 1972



MOUNT DORA  
COMMUNITY TRUST

2022

ANNUAL REPORT

## A PRIVILEGE OF A LIFETIME...

Many years ago I was asked by the Board of Directors of the First National Bank to fill a vacant seat on the Mount Dora Community Trust Distribution Committee. The vacancy had been created by the passing of a very special person in our town. I was honored to take the seat of a man known as "Mr. Mount Dora", the late Richard "Dick" Edgerton, who had served on the MDCT Distribution Committee since its inception in 1972. **My appointment became an honor and definitely a privilege of my lifetime.**

For the past twenty-five years of sitting in Dick's chair, the rewards of seeing the generosity of our community have been unbelievably gratifying. To see and realize how our community has come together - to bring the vision of a small number of people to what the Mount Dora Community Trust is today - is overwhelming. My personal reward has been to see how many people in our town have been helped by the giving of others.



I cannot leave my chair without the mention of a life-long family friend, the late Mr. W. T. "Bill" Bland Jr., who did not want or need the recognition of what he has done for the Mount Dora Community Trust. Although Bill was a benefactor without equal to MDCT, his sole motive was purely to help others. His desire to help truly sums up the Mount Dora Community Trust. It's not about what you give but rather about the rewards you receive in helping others.

I have chosen to move on in life and now let others have a chance to enjoy the satisfaction and privilege of a lifetime.

A handwritten signature in black ink, appearing to read "Sam", written in a cursive style.

Sam S. Sadler, III

## SERVICES OFFERED

**Unrestricted Funds:** Provides funding for an array of community needs. This type of account provides funding for requests from local nonprofits, to provide assistance with community projects.

**Field-of-Interest Funds:** Provides grants to nonprofits working in key areas of concern such as arts, youth activities, human services, animals or the environment.

**Donor-Advised Funds:** Enables living donors to recommend where their money is granted. This is a great alternative to starting or continuing a private foundation.

**Scholarship Funds:** Helps college or trade-specific students achieve their dreams.

**Designated Beneficiary Funds:** Forever provides annual grants to specific organizations you name.

**Corporate Endowments:** Corporate foundations (or company-sponsored foundations) are philanthropic organizations that are created and financially supported by a corporation. The foundation is created as a separate legal entity from the corporation, but with close ties to the corporation.

## PRIVATE FOUNDATION ALTERNATIVE

Running a private foundation comes with administrative hassles, endless solicitations and other obligations that can temper the joy of philanthropy. Partnering with the Mount Dora Community Trust offers a simpler way to accomplish your charitable goals. You get all the benefits of a private foundation and so much more.

# EXISTING FUNDS

A. Lee French Family Trust  
Aileen Joiner Scholarship Fund  
Alice Edgar Memorial Fund  
Breast Diagnosis Fund/Pink Tea  
Brown Family Foundation  
Carey Baker Charitable Trust  
Chaplains Discretionary Fund  
Community Service Scholarship Fund  
Cornerstone Hospice Fund  
Dennis Family Junior Golf Fund  
Disaster Response Fund  
Dunbar Rotary Scholarship Fund  
Dynamic Energy Exchange Fund  
Earhart Rotary Fund  
East Town Community Foundation  
Edgerton Fountain Endowment  
Epaillard Family Endowment  
FBCU Crawford Scholarship Fund  
First Peninsula Charitable Fund  
FIRST Robotics Team 1557  
FNBMD Fund  
Forward March Initiative Fund  
Frank Brown Youth Fund  
General Philanthropic Fund  
Glenn Arthur Christians Engineering Scholarship Fund  
GNO Visual Art Fund  
Guenther Family Foundation  
Harold & Janet Esch Endowment Fund  
Highland Street Golf Endowment Fund  
Janice J. and John M. Cahill Vocational Scholarship Fund  
JJST Charitable Fund  
Joel J. & Anna J. See Scholarship Fund  
The John Liptak Basketball Scholarship Fund  
Kelly Bodnaruk Scholarship Fund  
Kim Y. Stewart Legacy Fund  
Lake Cares Community Fund  
Lakes & Hills Garden Club Fund  
Lighthouse Walk Endowment Fund  
Liveright Endowment for the Performing Arts Fund  
Liz Perrett Scholarship Fund  
M.I.K.E. Fund  
Mack & Lavond Clayton Foundation  
Maggie Evans Fund  
Martensen, Reid, and Gardner Fund  
Mary E. Beacon Memorial Scholarship Fund  
MDHS Stadium Improvement Fund  
Mike Stone Memorial Scholarship Fund  
Mount Dora Chamber Foundation  
Mount Dora Community Concert Foundation

Mount Dora Concert Foundation 2  
Mount Dora Friends of the Environment  
Mount Dora Golf Association Endowment Fund  
Mount Dora High School Class of 2017 Scholarship Fund  
Mount Dora Lawn Bowling Fund  
Mount Dora Library Association  
Mount Dora Teacher Legacy Endowment Fund  
Mount Dora Teacher Legacy Ops Fund  
Natasha Arano Memorial Scholarship Fund  
Omega Lambda Gamma  
Orval M. Hagerty Scholarship Fund  
Orval M. Hagerty Swim Fund  
PowerOne Technology Scholarship Fund  
Rapid Response Fund  
Rest and Renew Foundation  
Rich Critters Fund  
Rileigh Hanson Journey Fund  
The Robert & Linda Z. Armes Charitable Foundation  
Robert Morton Endowment  
Rotary Bill Bland Scholarship Fund  
Round Lake Charter PTO Scholarship Fund  
Schloot Rotary Scholarship Fund  
Serenity Park Fund  
Sister Cities Association Fund  
Sister Cities Association Fund 2  
Susan Weinstock Memorial Scholarship Fund  
Sylvanna Jandel King Scholarship  
Touchstone Community First Foundation  
Turner Charitable Trust  
W.T. Bland Jr. Charitable Fund  
William H. Klingbeil Fund  
The Williams Fund

## Robert Armes

The late Bob Armes (1942 - 2022), moved with his wife Linda to Mount Dora in 2001, and for many years continued to enjoy their summer months in Rhode Island. Bob's love of sailing and of the Mount Dora Yacht Club was known by everyone in his circle of influence. Bob and Linda's love of charitable giving led them to establish the "Robert & Linda Z. Armes Charitable Foundation" as their legacy.





# NEW FUNDS



## We're pleased to welcome these new funds to Mount Dora Community Trust.

- Bill Bland Rotary Scholarship
- Dynamic Energy Exchange
- East Town Community Foundation
- The Epailard Family Foundation
- Mount Dora Concert Foundation 2
- Rest & Renew Foundation
- Turner Charitable Trust



### Bill Bland Rotary Scholarship

Established by The Rotary Club of Lake County Golden Triangle to provide scholarship funding for potential finance, law enforcement, agriculture and technical students (secondary, undergraduate, graduate or trade school). Eligible students should be residents of Lake County or attend Lake County schools.

### Dynamic Energy Exchange

Established by Dianne "Dee" Gretzler to provide funds for a variety of charitable organizations or causes, such as to benefit children and their families in the foster care system, to provide funds for education-based organizations for children and adults, to assist animal welfare and advocacy organizations, for organizations in the field of neuroscience and for land preservation or community garden organizations.



### East Town Community Foundation

Established by Bobby and Rona Rowe to provide support or funding for The Mount Dora Historic East Town area, residents, businesses and any other charitable organization that benefits Mount Dora's Historic East Town.



### Turner Charity

The Turner Charitable Trust was recently opened under our umbrella by Tom and Dawn Turner to provide funding for the Wheelchair Foundation, Lake Cares, WMFE and other General Philanthropy. Both believe that Mount Dora is one of the best places in the world to live and hope that their Trust will contribute to the joy of Mount Dora.

# GRANT HIGHLIGHTS



**\$11,000 | Close Up Foundation takes MDHS kids on a guided educational trip to Washington D.C.:** The Washington High School Program (WHSP) with the foundation aims to build students' sense of political efficacy. Specifically, the WHSP helps students develop knowledge and practical understanding of the basic concepts and processes of democratic government and citizenship, the values that guide our democracy, as well as, the concrete skills that make that knowledge meaningful. Students will gain greater understanding of the rights and responsibilities of citizens in a democracy and will develop skills and dispositions to carry out those rights and responsibilities.



**\$5,000 | Lake Sumter Children's Advocacy Center – Expressive Therapies:** The Expressive Therapies Program provides specialized therapeutic interventions to child survivors of physical abuse, sexual abuse and neglect. Since 1997, Lake Sumter Children's Advocacy Center has operated trauma-informed services to child survivors in Lake County. The mission of the Lake Sumter Children's Advocacy Center is to provide a child-friendly, community-based facility where child victims can be safely interviewed, provided with crisis counselling and receive medical exams and long-term specialized therapy. MDCT's funding purchased iPads to be used directly with child victims for clinical use to address trauma-related issues.



**\$3,000 | United Way Family Stability Services:** This grant is used to provide payments for rent, mortgage and utility bills for ALICE (Asset-Limited, Income-Constrained, Employed) families living in Mount Dora who are experiencing financial crises. These families have incomes above the federal poverty level but below the basic cost of living for our area. They often struggle to remain financially stable when unexpected emergencies arise, such as medical bills, car repairs, or sudden decreases in income. Funds were used to provide rent payments for four households in need living in Mount Dora.



**\$4,029 | A Forever Home Animal Rescue:** This grant assisted in renovating A Forever Home Animal Rescue's building with new epoxy flooring to help keep the rescue and dogs clean. This rescue is located in Tavares and rescues strays, takes owner surrenders and other rescue dogs that are due to be euthanized at other shelters.



# GIVING WEEK RECAP 2021

With **YOUR support**, Mount Dora Community Trust was able to raise a cumulative total of \$205,233.70 for 28 charities, reach 415 new donors, and give away \$85,000.

The total going to charity from Giving Week is \$290,233.70. **2021 winners included:**

## Mega

**1<sup>st</sup> Place: Haven of Lake & Sumter Counties**



**Raised - \$28,686.55**  
**Receiving from MDCT - \$15,000**

**2<sup>nd</sup> Place: AdventHealth Foundation - Waterman**



**Raised - \$20,578.32**  
**Receiving from MDCT - \$6,000**

**3<sup>rd</sup> Place: YMCA Golden Triangle**



**Raised - \$2,721.58**  
**Receiving from MDCT - \$1,361**

## Large

**1<sup>st</sup> Place: Forward Paths Foundation**



**Raised - \$22,444.44**  
**Receiving from MDCT - \$15,000**

**2<sup>nd</sup> Place: Trout Lake Nature Center and Lake Cares Food Pantry**



**Raised - \$10,290.58**  
**Receiving from MDCT - \$6,000**



**Raised - \$10,511.17**  
**Receiving from MDCT - \$6,000**

**3<sup>rd</sup> Place: Sonnentag Theatre at the IceHouse**



**Raised - \$9,730.03**  
**Receiving from MDCT - \$4,000**

## Medium

**1<sup>st</sup> Place: M.I.K.E. Endowment**



**Raised - \$34,915.55**  
**Receiving from MDCT - \$15,000**

**2<sup>nd</sup> Place: Mount Dora Lawn Bowling**



**Raised - \$20,523.49**  
**Receiving from MDCT - \$6,000**

**3<sup>rd</sup> Place: Rotary Club of Lake County Golden Triangle**



**Raised - \$9,281.80**  
**Receiving from MDCT - \$4,000**

**Mega** | AdventHealth Foundation - Waterman | Central Florida YMCA Golden Triangle | Cornerstone Hospice | Habitat for Humanity | Haven of Lake and Sumter | Lake-Sumter State College Foundation | LifeStream Behavioral Center | UF Health Foundation at Leesburg

**Large** | Easter Seals Camp Challenge | Forward Paths Foundation | Lake Cares Food Pantry | Lake County Sheriff's Charities | Mount Dora Center for the Arts | New Vision for Independence | Sonnentag Theatre at the Icehouse | Trout Lake Nature Center | We Care of Lake County

**Medium** | Companions for Courage | Fellowship of Christian Athletes – Mount Dora | Forward March Initiative | Highland Street Golf Endowment | L.E.A.S.H., Inc. | Mount Dora Lions Club | M.I.K.E. Endowment | MD Chamber Foundation | Mount Dora Lawn Bowling | Rotary Club of Lake County Golden Triangle



## GALA HIGHLIGHTS

**Thank you to our generous sponsors:** Kim Y. Stewart Legacy Fund, First National Bank of Mount Dora, W.T. Bland, Jr. Charitable Trust, KEVCO Builders, G3 Development, Hillcrest Insurance Agency and Ford Press.

Looking forward to seeing everyone at the 2<sup>nd</sup> Annual Gala.



**HILLCREST**  
INSURANCE AGENCY





# 2022 GALA GIVEBACK

All profit from our Gala went back into the community! The following organizations were chosen by a special committee of account holders:



**\$3,000 Companions for Courage, Inc.** - to support training and welfare of children through comfort animals



**\$3,000 Forward Paths Foundation, Inc.** - to help with any related costs associated with housing for foster care graduates



**\$3,000 Mount Dora Youth Football League** - to assist with uniform and equipment costs or youth scholarship for players



**\$1,000 Lake Cares Food Pantry** - to aid in purchasing food for clients struggling with food insecurity



**\$1,000 Lake Sumter Children's Advocacy Center, Inc.** – to assist with necessary resources related to supporting child victims of abuse



**\$1,000 Take Stock in Children** – to help offset the costs related to the organization's scholarship program

# YEAR IN REVIEW



**\$1.2 Million**

in philanthropic grants paid out



**43**

philanthropic organizations granted money



**\$23.2 Million**

in assets under management



**91%**

performance rate, funds paid out toward our charitable mission



**71**

scholarships given to local students

# \$1,000+ GOLD LEVEL DONORS

Anita K. Simpson Family Trust  
Barbara Gherardi  
Barbara Mann  
Ben Seabrook  
Bertrand and Janice Epailard  
Brago Productions Inc.  
Brian Smith  
Bruce and Lisa Beckstein  
Castner and Anne Waddell  
Catherine T. Hoechst Campaign Account  
Charles and Susan Mcconnell and Patschak  
Citizens First Bank  
Colleen Kollmann  
Cory Taylor  
Cynthia Jackson  
Darlin Kalmes, Julie Kesslet and Judie Lee  
David A. Derby  
David and Jennifer Harper  
David Lewis, IRA Custodian  
David Marshall  
David Weiss  
Denise Burry  
Dianne Gretzler  
Donald Ross  
Donna Mitchell  
Donna Shelley  
Ed and Diane Brooks  
Edward and Sarah Hershey  
Edward Foxx, Jr. and Peggy M. Bixby  
Equinox Development Properties, Inc.  
Eric W. Benzing  
FIRST  
First Baptist Church of Umatilla  
The First National Bank of Mount Dora  
Fortenberry Sales, Inc.  
Frank D. Scott, III  
Fred Robey  
Frederick and Tracy Belton  
G3 Development  
Gator Lien Search, LLC  
Golden Triangle Post AMVETS Post 1992  
Henry Chapin TUA FBO Blanche Chapin  
Henry Ollendick  
Henry W. Land, II  
Hillcrest Agency, Inc.  
IFPS Chapter 49 & 50  
Janet Ross  
Janice Gruber  
Jason and Gail Burgos  
Jimmy's Electric Service  
JJST Charitable Fund - Alan and Amy Fortenberry  
John H. Zimmerman and Leslie A. King  
Joseph and Susan Lewis  
Joseph Ziler  
Joshua Jungferman  
Julieann Klein  
Kevco Builders, Inc.  
Kevin and Dawn Pokorney  
Kim Stewart  
Kim Varnadore Insurance Agency, Inc.

The Lake Sumter Lions Charities Inc.  
Lake Sumter State College Foundation  
Las Palmas Cuban Restaurant  
Laura Passen  
Lowndes, Drosdick, Doster, Kantor and Reed, PA  
Marilyn White  
Marsha Straughan  
Marshall Pearlman  
Mary Jahn  
MDHS Boosters  
Michael and Kathryn Maneilly  
Michael Stewart  
Mike & Karen Spear Giving Fund  
Misty Welter  
Mount Dora Police Department  
National Christian Foundation - Orlando  
New Covenant United Methodist Church  
Niagara Bottling, LLC  
Nicholas C. Waggoner, LLC  
Patricia Spear  
Rebecca Kirton  
Rebecca S. Tyndall  
Reliable Restorations  
Robbie Leonard  
Robert and Linda Armes  
Robert Simpson  
Roger and Fran Bricault  
Roland Williams  
Rotary Club of Lake County Golden Triangle  
Rotary Sabra Schlagetter  
Roy Hamlin  
Ruth Jones  
Saint Mark Ame Church, Inc.  
Scott and Christie Wilson  
Seburn Woods  
Secured Roofing and Restoration, LLC  
Sherry C. Callahan  
Shipley Law Firm & Title Company  
Siedle, Arnold D. CRUT FBO Robert D. Siedle  
Smallwood Sign Company, Inc.  
Stan and MaryAnn Napier  
Stark Brumley-Martin  
Stupp Bros. Bridge & Iron Co. Foundation  
Susan Myers  
Suzanne Cunningham  
Tall Pines Ranch  
Tamitha R. Dooley  
Tara S. Boyter  
Thomas and Dawn Turner  
Thomas Miranda  
Todd Faden  
United Southern Bank  
W.T. Bland Charitable Trust  
Walmart  
Walter and Alice Kratsch  
West Construction Services, Inc.  
William "Jeff" Goggin  
The Williams Fund  
WTDI LLC  
Zellwin Farms Company

# NEXT 50 YEARS OF IMPACT

The question that will drive our next 50 years of the Mount Dora Community Trust is:  
“What do we need to know to influence change where it is needed most?”

A community foundation or trust, by definition, is a nonprofit organization that facilitates and pools donations that are then used to address critical community needs in a geographical area.

Impact measurement within the grantmaking process is a crucial component of good stewardship and governance, to make certain the outgoing grants align with critical needs. We owe such stewardship to the thousands of donors over the years who have trusted the Mount Dora Community Trust (MDCT) to enhance and support the communities we serve.

**Measurable impact grantmaking** enables us to determine the value of our donor's investments in terms of the difference they're making within the organizations they support.

In addition to having open grant cycles, allowing all nonprofits to apply for any purpose, we plan to use collected data to identify critical and immediate needs, guiding the development of strategic partnerships to influence real and positive change. Initiatives and programs will be formed with an abundance of input from those around us who are actively experiencing life here. Which is why as we head into the 2022-2023 Fiscal Year, our application cycles will not only be more competitive - driven by how our grant dollars will impact the community - but some may be multi-year programs formed with community partners to maximize impact in pre-determined key areas.

With this change in the way we determine funding, we can better demonstrate progress as well as further define, assess and improve effectiveness. **We are excited for the future and proud of the small but impactful role MDCT will be able to play in financially supporting the positive change happening around us.**



## **\$100,000 | Lake Support and Emergency Recovery (LASER):**

The mission of Lake Support & Emergency Recovery (LASER) is to strengthen Lake County's recovery from any disaster through a coordinated community-wide approach which provides for the immediate and long-term unmet needs of our citizens. This grant was for the hurricane mitigation program, which allows homeowners to apply to get their home retrofitted to make it hurricane resistant. Mount Dora citizens not in the CRA, NECRA, or USDA zones qualify.



# SCHOLARSHIPS

## Elizabeth Chapman

Elizabeth received two scholarships from MDCT: The Community Service Scholarship and the PowerOne Scholarship for Technology. In her personal statement, she told us her father passed away from liver and colon cancer recently, after being diagnosed in 2018. Elizabeth and her brother (who is disabled) are surviving on one parent's income as a custodial worker. Elizabeth has what it takes to succeed and we are proud to support her. Elizabeth – we cannot wait to see you achieve your dreams!

"I am very honored to be selected for this as the scholarships I received have helped me in my first year of college immensely. I am more thankful than I can put into words. Often, I thought I would not be able to attend college because I could not afford it - along with helping to provide for my family. **I want to thank the donors as well as the Mount Dora Community Trust for giving me the chance to pursue my dreams in graphic design.**"





# STAFF & DISTRIBUTION COMMITTEE



**MDCT Staff**

**Back Row:** Sarah Herrick (Program Director), Tabitha Moore (Community Impact Coordinator)

**Front Row:** Rob English (Executive Director), Kim Delvernois (Administrative Assistant)



**MDCT Distribution Committee**

**Back Row:** Billy Brooks, Bobby Rowe (Co-Chair), Sam Saddler

**Front Row:** Kim Stewart (Chair), Chrissy Stile

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## MDCT Address:

821 N. Donnelly Street  
Mount Dora, FL 32757

## Phone Number:

(352) 383-2150

## Website:

[MountDoraCommunityTrust.com](http://MountDoraCommunityTrust.com)

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*Mount Dora Community Trust's Assets are managed by the First National Bank of Mount Dora Trust Department acting as Trustee.*



# 2022 STUDENT ART WINNER



**Dakota Williams**  
**Knight with a Helping Hand, 2022**

## Dakota Williams



Dakota Williams is a sixteen year-old student at Mount Dora Christian Academy. When given the parameters of what the Mount Dora Community Trust was looking for in an art piece for this report, she immediately knew she would create a "Knight with a Helping Hand." She thought of our philanthropic projects as unconditional support of others in the community, lending a helping hand to our neighbors despite any economic differences or life circumstances. MDCT thanks Ms. Williams for this extremely thoughtful piece.

Dakota plans to receive a post high school education in an art-related field, such as illustration, comics or concept design. We are excited to follow her journey and witness the success we know she will accomplish.





# 50 YEARS OF LEGACY