As the Community Foundation completes its 19th year of service, we are grateful to our fundholders, community partners, volunteer leadership, and all those that have collaborated with us to promote the well-being, vibrancy, and philanthropic spirit of the communities we serve.

As an organization we strive to engage our donors and fundholders by connecting their charitable goals with the needs of each community. As you will see in this annual report, our stakeholders came together this past fiscal year in unprecedented fashion granting out $16 million to fund many worthwhile projects making a difference in our community and beyond.

On behalf of our Board of Directors, Leadership Councils, and staff, thank you for your continued support. I invite you to learn more about our work and to join us.

Sincerely,

Terry W. Simmers, President / CEO

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Board of Directors

Suzie Moraco
Jeff Cox
Walker Wilkerson
Laura Hawley
Clayton Hollis
Bruce Abels
Barney Barnett
Jim Chaffin
Bill Dorman
Anne Furr
Jay Gray
Ed Grossman
Kevin Hennessey
Jack Hollis

Board Chair
Vice Chair
Treasurer
Secretary
Immediate Past Chair

Roger Ingley
Sarah McKay
Bonnie Parker
Lyle Philipson
Tim Putnam
Linda Rich
Rick Stephens
Mark Turner
John Vreeland

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Foundation Staff

Terry Simmers
Amy Royal
Lori Martini
Rhonda Todd
Johnna Martinez
Dave Walter
Christy Vreeland

President / CEO
Chief Financial Officer
Chief Philanthropic Officer
Community Engagement Specialist
Grants Manager
Communications Specialist
Executive Assistant

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Connect With Us
Grants by Nonprofit Focus (2015-2016 Fiscal Year)

- **Education**: $5.4 M
- **Community Development**: $3.4 M
- **Human Services**: $2.9 M
- **Religion**: $1.8 M
- **Animal Services**: $0.8 M
- **Youth Development**: $0.7 M
- **Health**: $0.6 M
- **Arts**: $0.5 M

Fiscal Year Highlights

- **$16 million** total grants awarded to...
- **453** nonprofit organizations
- **1,099** total grants were issued within the United States
- **919** of those grants were issued within the State of Florida
- **784** of those grants were issued within Polk, Hardee, and Highlands Co.
**Active Funds**

<table>
<thead>
<tr>
<th>Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor Advised</td>
<td>112</td>
</tr>
<tr>
<td>Nonprofit</td>
<td>59</td>
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<tr>
<td>Designated</td>
<td>27</td>
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<tr>
<td>Legacy</td>
<td>20</td>
</tr>
<tr>
<td>Community</td>
<td>19</td>
</tr>
<tr>
<td>Memorial</td>
<td>8</td>
</tr>
<tr>
<td>Field of Interest</td>
<td>8</td>
</tr>
<tr>
<td>Scholarships</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total Active Funds</strong></td>
<td><strong>256</strong></td>
</tr>
</tbody>
</table>

**Charitable Funds in Last 10 Years**

*Graph showing the increase in charitable funds from 2007 to 2016.*

**Types of Charitable Funds**

- **Donor Advised** funds permit donors to participate in the funding process by suggesting grants to nonprofit organizations.
- **Nonprofit Organization** funds provide cost-effective investment strategies and enhanced stewardship for nonprofit organizational assets.
- **Designated** funds support one or more nonprofit organizations the donor preselects.
- **Legacy** funds are a charitable tool that allows you to set-up a bequest to your community and directs the contributions to the nonprofits that are aligned with your interests and passions.
- **Community** funds enable donors to meet community needs in perpetuity.
- **Memorial** funds forever honor a family member or friend. The fund may be designated to a field of interest(s) or specific charitable organization(s) which would have pleased that person.
- **Field of Interest** funds allow donors to support broad areas of interest, such as education, arts, environment, or youth services.
- **Scholarship** funds are an effective vehicle to help young people achieve their dreams of an education.
Paul & Jean Cate Charitable Endowment Fund

After moving to Winter Haven from New Jersey, Paul and Jean Cate quickly took to their new community. Aside from being mayor and a city commissioner of Winter Haven, Mr. Cate was a board member of numerous nonprofits. They were active advocates for their community and grew to be well-loved by those in the area.

Paul and Jean wanted to ensure their support of their community would continue even after they passed away, so the couple set up a fund within the Community Foundation of Greater Winter Haven, now the GiveWell Community Foundation. Their fund, the Paul and Jean Cate Charitable Endowment Fund, was designed by the couple to benefit nine nonprofits. Every year after the couple’s passing, these local nonprofits each receive a grant to help support the organizations’ missions. Since 2006, the fund has granted out more than $1.2 million.

Harvey T. Hall Jr. Fund

After serving in the Navy Judge Advocate General Corps during World War II, Harvey Thomas Hall Jr. left his hometown of Roanoke, VA and moved to Lakeland.

As a lawyer, grove owner, and rancher, Harvey loved the outdoors and was an active member of the community. He served as president of Cleveland Heights Golf Club and was a charter member of St. David’s Episcopal Church in Lakeland.

Harvey established an endowment fund within the Community Foundation of Greater Lakeland, now the GiveWell Community Foundation, that would generate grants to local nonprofits. The grants would be dispensed annually to the organizations of his choosing for ten years after his passing.

This year, after a decade of impactful giving, the Harvey T. Hall Jr. Fund made its final set of grants. More than $1.2 million went towards education and scholarships, women’s health, and treating children in extreme emotional distress.

In all, approximately $3 million was granted to the community over the life of Harvey’s fund, leaving a powerful legacy for a generous man who was thoughtful enough to plan ahead for his community.

be remembered for your kindness

Paul and Jean Cate – Photo courtesy of Bob Gernert
Impact Polk 2016 Highlights

$743,828
total funding

62%
of 126 applications received funding

more than 100,000
individuals impacted by funded programs

What is Impact Polk?

Impact Polk is the GiveWell Community Foundation’s annual community grant program. The program began in 2014 as an expansion of Impact Lakeland.

Impact Polk is open to 501(c)(3) public charities serving the Polk County area and aims to support local nonprofit organizations fulfill their mission to help those in need around our community.

Since 2014, more than $2.8 million has been granted through Impact Polk to local nonprofit organizations.

Each application is reviewed for organization credibility, capacity, project feasibility, and community importance. Organizations receiving funding through Impact Polk are required to provide measurable results of their program.

Funding by Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>$329,181</td>
</tr>
<tr>
<td>Health &amp; Human Services</td>
<td>$278,192</td>
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<tr>
<td>Arts &amp; Culture</td>
<td>$99,836</td>
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<tr>
<td>Other</td>
<td>$36,619</td>
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</tbody>
</table>

Individuals Impacted

<table>
<thead>
<tr>
<th>Category</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Culture</td>
<td>71,022</td>
</tr>
<tr>
<td>Education</td>
<td>22,453</td>
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<tr>
<td>Health &amp; Human Services</td>
<td>21,295</td>
</tr>
<tr>
<td>Other</td>
<td>1,463</td>
</tr>
</tbody>
</table>
Regifting: It’s not only acceptable...it’s preferred.

Want to help our community nonprofits in a fun and interactive way? Then give a GiveCard to friends, family members, co-workers or to the person who has everything! Recipients can redeem their GiveCards by selecting and donating to one or more nonprofits listed at GiveCard.GiveCF.org. GiveCards can be reloaded over and over and given to lots of others who want to help make our community a better place, too! Got the idea? Now repeat!

Get your giving on at GiveCard.GiveCF.org
“Unless someone like you cares a whole awful lot, it's not going to get better. It's not.”

- dr. seuss