



*annual report*  
2015-2016

# introduction



## A Letter from Our President

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,

A handwritten signature in black ink that reads "Terry W. Simmers". The signature is fluid and cursive.

**Terry W. Simmers**, President / CEO

## Board of Directors

Suzie Moraco	<b>Board Chair</b>
Jeff Cox	<b>Vice Chair</b>
Walker Wilkerson	<b>Treasurer</b>
Laura Hawley	<b>Secretary</b>
Clayton Hollis	<b>Immediate Past Chair</b>
Bruce Abels	Roger Ingley
Barney Barnett	Sarah McKay
Jim Chaffin	Bonnie Parker
Bill Dorman	Lyle Philipson
Anne Furr	Tim Putnam
Jay Gray	Linda Rich
Ed Grossman	Rick Stephens
Kevin Hennessey	Mark Turner
Jack Hollis	John Vreeland

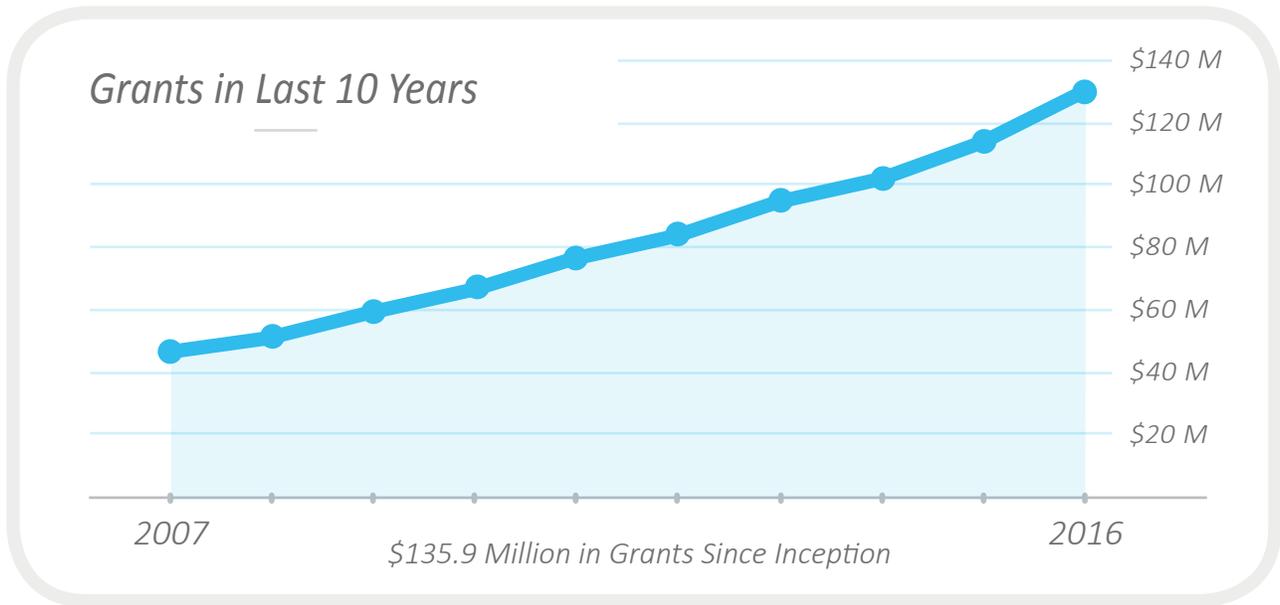
## Foundation Staff

Terry Simmers	<b>President / CEO</b>
Amy Royal	<b>Chief Financial Officer</b>
Lori Martini	<b>Chief Philanthropic Officer</b>
Rhonda Todd	<b>Community Engagement Specialist</b>
Johnna Martinez	<b>Grants Manager</b>
Dave Walter	<b>Communications Specialist</b>
Christy Vreeland	<b>Executive Assistant</b>

## Connect With Us



# grants



### 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...

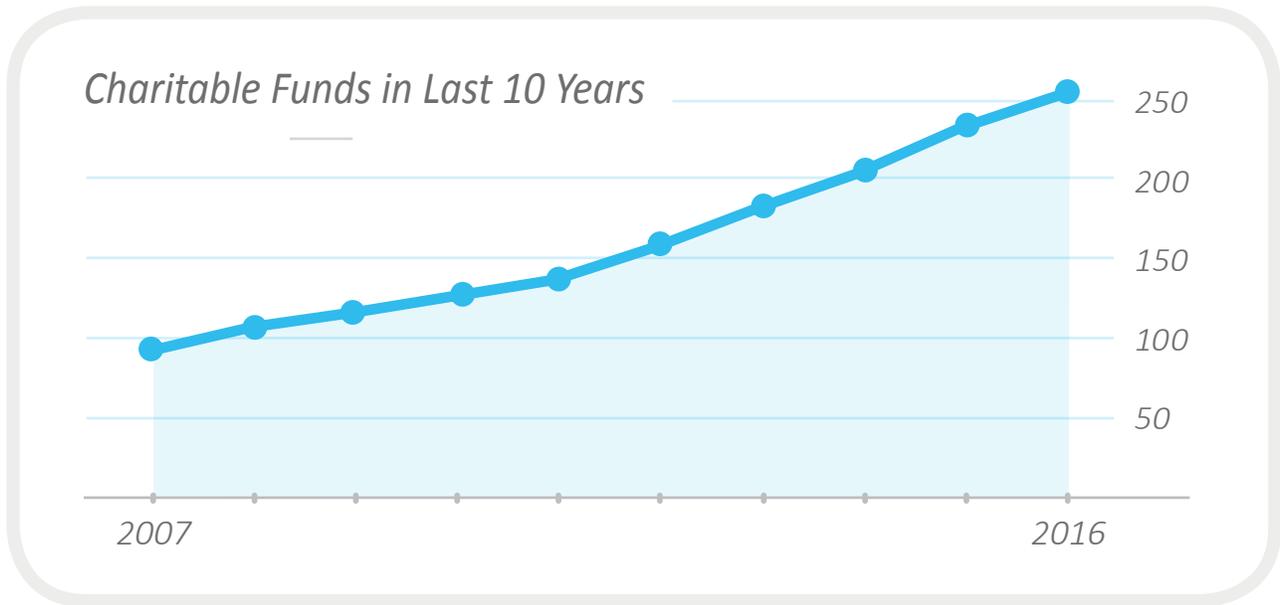
**453**  
nonprofit organizations

**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.

# funds



Active Funds
112 Donor Advised
59 Nonprofit
27 Designated
20 Legacy
19 Community
8 Memorial
8 Field of Interest
3 Scholarships
<b>256 Total Active Funds</b>

## 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.

# legacies

## *Paul & Jean Cate Charitable Endowment Fund*



*Paul and Jean Cate – Photo courtesy of Bob Gernert*

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 it's 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*

# impact polk



## Impact Polk 2016 Highlights

**\$743,828**  
total funding

**62%**  
of 126 applications received funding

**more than 100,000**  
individuals impacted by funded programs

## Funding by Category

Education \$329,181

Health & Human Services \$278,192

Arts & Culture \$99,836

Other \$36,619

## 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.

## Individuals Impacted

Arts & Culture 71,022

Education 22,453

Health & Human Services 21,295

Other 1,463



## ***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](http://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](http://GiveCard.GiveCF.org)**



“  
Unless someone  
like you cares a  
whole awful lot,  
it's not going  
to get better.  
It's not.”

- dr. seuss