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ABOUT GIVEWELL COMMUNITY FOUNDATION

OUR MISSION

To champion charitable giving to improve the quality of life in the areas we serve, both now and for future generations.

ABOUT US

The GiveWell Community Foundation is a tax-exempt, 501(c)(3) public charity serving thousands of people who share a common interest of improving the quality of life in our service area. Individuals, families, businesses, and organizations can create permanent charitable funds with the Community Foundation that help our region meet local challenges through high-impact grants to effective nonprofit organizations.

GiveWell Community Foundation is an accredited community foundation, confirmed in compliance with National Standards for U.S. Community Foundations.

WHERE WE SERVE

GiveWell Community Foundation serves three Central Florida counties: Polk, Hardee, and Highlands. We have two office locations, our main office in Lakeland and a satellite office in downtown Winter Haven.
Dear friends,

The 2016-2017 fiscal year was a remarkable year for the GiveWell Community Foundation! Thanks to our generous fundholders, more than $21 million was granted to impactful nonprofit organizations throughout Polk, Hardee, and Highlands counties and beyond.

Today, the Community Foundation houses more than 280 charitable funds, and over $140 million has been granted since our inception.

We are extremely grateful to our fundholders, volunteer leadership, community partners, and all of those who have collaborated with us to promote the well-being and philanthropic spirit of the communities we serve.

On behalf of our board of directors, leadership council, and staff, thank you for your continued support.
BOARD OF DIRECTORS

Bruce Abels
Barney Barnett
Jim Chaffin
Jeffrey Cox Sr., Vice Chair
Bill Dorman
Anne Furr
Jay Gray
Edward Grossman
Laura Hawley, Secretary
Kevin Hennessey
Clayton Hollis, Immediate Past Chair
Jack Hollis
Roger Ingley
Suzie Moraco, Board Chair
Sarah McKay
Bonnie Parker
Lyle Philipson
Thomas "Tim" Putnam
Linda Rich
Richard Stephens
Mark Turner
John Vreeland
Walker Wilkerson, Treasurer

STAFF

Terry Simmer, President/CEO
Amy Royal, Chief Financial Officer
Lori Martini, Chief Philanthropic Officer
Johnna Martinez, Grants Manager

Rhonda Todd, Community Engagement Specialist
Dave Walter, Communications Specialist
Christy Vreeland, Executive Assistant
ABOUT GIVEWELL COMMUNITY FOUNDATION

AUDIT COMMITTEE

Lew Belcourt
Jay Gray
Edward Grossman, Chair
Kevin Hennessey
Roger Ingle
Sandra Sheets

GOVERNANCE COMMITTEE

Jeffrey Cox Sr., Chair
Laura Hawley
Sarah McKay
Thomas "Tim" Putnam
Mark Turner

INVESTMENT COMMITTEE

Bruce Abels
Randall Andersen
Lew Belcourt
Chuck Bovay
Jim Chaffin, Chair
Jeffrey Cox Sr.
Bruce Davis
Kevin Hennessey
Bonnie Parker
Lyle Philipson
Richard Stephens
John Vreeland
Jefrey Walker

LEADERSHIP COUNCIL

We rely on members of the Leadership Council to act on behalf of the organization and its fundholders to reflect and represent the community served by the Community Foundation; stay informed on past, present, and future needs of the community; foster regional philanthropic development; and create better awareness of the Foundation, its mission, and its value to the community.

Keith Albritton
John R. Alexander
Ralph Allen
Randy Andersen
Wesley Barnett
Chad Barnhardt
Hunt Berryman, Region II Chair
Joe Bogdahn
Jean Bostick
Chuck Bovay
Matt Butz
Denise Chambers
John Curtis
Bruce Davis
Darlene Eanett
Kimberly Elmhurst
Brian Fisher
John Fitzwater
Scott Franklin
Mike Furr
Jack Hollis, Council Chair
Rusty Ingle,
Region III Chair
Dick Johnson
Kathryn Koch
Josh Lewis
Brian Marbut
Parkhill Mays
Dana Y. Moore
Paul Noris
Tom Oldt, Region I Chair
Alice O’Reilly
Renee Pobjecky
Jennifer Royal
John Scheck
Richard Shapiro
Sandra Sheets
Carol Shira
Chris Sikes
Charles Soule
Jillian Spangler
Sergio Vallejo
Jeff Walker
Lori Wilson

THANK YOU!

GiveWell Community Foundation is grateful for the dedicated support of our 2016-2017 volunteer leadership.

The best way to find yourself, is to lose yourself in the service of others.

― Mahatma Gandhi

6
2016-2017: YEAR IN REVIEW

HIGHLIGHTS

$21.8M

total $ granted

930

total grants were issued within the United States

848

of those grants were Issued in the State of Florida

721

of those grants were Issued in Polk, Hardee, and Highlands counties
This year, the GiveWell Community Foundation and its fundholders distributed 930 grants totalling $21,839,837 to support many impactful nonprofit organizations and worthy causes throughout our communities. The chart above is an overview of those grants by category.
OVERVIEW OF FUNDS AT GIVEWELL COMMUNITY FOUNDATION

285 Total Funds
21 New Funds

7% Community Funds
Enable donors to meet community needs in perpetuity.

3% 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.

2% Field of Interest Funds
Allow donors to support broad areas of interest, such as education, arts, environment, or youth services.

1% Scholarship Funds
An effective vehicle to help young people achieve their dreams of an education.

1% Unrestricted Funds
Enables the Community Foundation’s grants committee to address the broad range of local needs.

43% Donor-Advised Funds
Donors participate in the funding process by suggesting grants to nonprofit organizations.

13% Designated Funds
Support one or more nonprofit organizations preselected by the donor.

22% Agency Funds
Cost-effective investment strategies and enhanced stewardship for nonprofit organizational assets.

8% Legacy Funds
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.

1% 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.

2% Field of Interest Funds
Allow donors to support broad areas of interest, such as education, arts, environment, or youth services.

1% Scholarship Funds
An effective vehicle to help young people achieve their dreams of an education.

1% Unrestricted Funds
Enables the Community Foundation’s grants committee to address the broad range of local needs.
2016-2017: YEAR IN REVIEW

COMMUNITY FOUNDATION INVESTMENT POOL

PERFORMANCE

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<thead>
<tr>
<th></th>
<th>Q4</th>
<th>2016</th>
<th>3 YR</th>
<th>5 YR</th>
<th>10 YR</th>
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<tbody>
<tr>
<td>Long Term Account*</td>
<td>0.36%</td>
<td>6.60%</td>
<td>3.18%</td>
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*Net of investment fees. Includes 5-8% cash.

GROWTH

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<th>Q4</th>
<th>YTD</th>
<th>2015</th>
<th>2014</th>
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<td>Beginning Value</td>
<td>141.0M</td>
<td>138.6M</td>
<td>131.1M</td>
<td>122.1M</td>
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<td>Net Flows*</td>
<td>8.7M</td>
<td>2.5M</td>
<td>8.9M</td>
<td>3.6M</td>
<td>9.6M</td>
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<tr>
<td>Gain/Loss</td>
<td>0.5M</td>
<td>9.1M</td>
<td>(1.4)M</td>
<td>5.4M</td>
<td>13.8M</td>
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<tr>
<td>Ending Value</td>
<td>150.2M</td>
<td>150.2M</td>
<td>138.6M</td>
<td>131.1M</td>
<td>122.1M</td>
</tr>
</tbody>
</table>

*Gifts received less grants issued.

INVESTED POOL

<table>
<thead>
<tr>
<th></th>
<th>Equities</th>
<th>Fixed Income</th>
<th>Alternative</th>
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<tr>
<td>Beginning Value</td>
<td>150M</td>
<td>100M</td>
<td>50M</td>
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<tr>
<td>Net Flows*</td>
<td>8.7M</td>
<td>2.5M</td>
<td>8.9M</td>
</tr>
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<td>150.2M</td>
<td>138.6M</td>
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<td>$-</td>
<td>141.0M</td>
<td>150.2M</td>
<td>150.2M</td>
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<td>$100M</td>
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<tr>
<td>$150M</td>
<td></td>
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STEWARDSHIP

Board of Directors

Investment Committee

Investment Policy Statement

Independent Consultant CapTrust

15 Investment Managers

INVESTED POOL

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<tr>
<th></th>
<th>$73,441,479</th>
<th>53.5%</th>
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<tr>
<td>Equities</td>
<td>$28,934,019</td>
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<tr>
<td>Fixed Income</td>
<td>$34,808,865</td>
<td>25.4%</td>
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<tr>
<td>Alternative</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$137,184,363</td>
<td>100%</td>
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Impact Polk is the annual grant program by GiveWell Community Foundation with the goal of addressing community needs throughout Polk County. 501(c)(3) nonprofit public charities serving Polk County may apply, and applications are presented to our fundholders and grant committee for funding consideration.

HIGHLIGHTS

84
Impact Polk grants awarded

$769,485
total $ awarded

81
local nonprofit programs funded

270,000
individuals impacted
REPURPOSE ART STUDIO'S JOB TRAINING INTERNSHIP TEACHES MARKETABLE SKILLS TO WOMEN PURSING ECONOMIC STABILITY AND A HEALTHY SUPPORT SYSTEM

For the past six years, Gospel Inc. has been working to provide a loving community in Lakeland’s Parker Street neighborhood. The faith-based nonprofit organization serves many of the marginalized and homeless members of this community.

From games and activities to monthly potluck meals, staff and volunteers at Gospel Inc. make an effort to form lasting, impactful relationships with people in the Parker Street community.
Gospel Inc.'s Repurpose Art Studio provides a safe, creative space for neighborhood women going through challenging situations. There, women are empowered to express themselves through creative, productive outlets that also produce skills sets that can strengthen their economic stability.

“When women learn a marketable skill, they use it to the betterment of themselves, their families, and their communities,” said Connie Lutter, Director of RePurpose Art Studio. “Especially when it is something they love!”

RePurpose Art Studio received an Impact Polk grant to help fund their Job Training Internship.

The program was a six-month opportunity made available to four at-risk women living in the Parker Street neighborhood who are pursuing economic stability and a healthy support system.

The four interns were paid fifteen hours per week to use the skills they are learning at RePurpose Art Studio. Such skills include sewing and jewelry-making, as well as practical skills like sales, inventory, administration, and management.

The women are also connected with local businesses willing to provide employment opportunities.
FAMILY FUNDAMENTALS' "MY OWN LIBRARY" PROVIDES AGE-APPROPRIATE BOOKS FOR CHILDREN TO TAKE HOME

Spearheaded by United Way of Central Florida and founded by Publix Charities, Success By 6 is an initiative to make early childhood development a top priority in Polk, Hardee, and Highlands counties. Their goal is to ensure that, by the age of six, all children have the physical, emotional, social, and mental foundation to succeed in school and in life.

At Family Fundamentals, the parent resource center for Success By 6, parents can receive the tools and support they need to be the best parents they can be. Over 40 agencies offer services on site to provide a one-stop opportunity for parents.

Family Fundamentals received an Impact Polk grant to help fund their "My Own Library" program. The program provides age-appropriate books for the children to take home as their own.

Not only are they building their home library, but their caregivers now have access to quality resources to continue the learning/teaching process and become the best first teacher they can for the child.
CONTACT

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Fax 863-683-5909
Website GiveCF.org

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Lakeland, FL 33801

Satellite Office
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Winter Haven, FL 33880

CONNECT

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@GiveCF

Follow Us On LinkedIn
GiveWell Community Foundation

give help. give hope. give well.
"No act of kindness, no matter how small, is ever wasted."

- Aesop