



ANNUAL REPORT 2019-20

Serving Polk, Hardee, and Highlands and beyond



Excellence. Accountability. Impact.™



From Our President/CEO

Dear fundholders and community partners,

As many of you know, I joined the GiveWell Community Foundation in April. At the time, our office building was closed, our staff working remotely, and we all were doing our best to understand and react to COVID-19's impact on our families and community. April 1st was by no means a "normal" first day on the job for me, but I was proud to find myself at an organization able to make a real difference in the face of global fear and uncertainty.

Your community foundation acted.

By collaborating with the United Way of Central Florida, we established the United Community Relief Fund to raise funds for those most vulnerable during the pandemic and the nonprofits who were able to provide vital COVID-19 relief services.

Our community stepped up.

Donations poured in, and you helped us raise over \$600,000 - which has been distributed through two rounds of grants in April and September.

As you will read in this annual report, we have many other highlights from this fiscal year to celebrate. We distributed over one thousand grants (more than any other year), totaling over \$23 million, with 86 percent of those grants awarded locally. We also launched the new "Toast" annual celebration of philanthropy for our fundholders and hosted our third annual workshop for nonprofits with agency funds.

I look forward to safely gathering and connecting with you all in-person when it is safe to do so.

Thank you for your continued support of the GiveWell Community Foundation.

John A. Attaway, Jr.
President/CEO

About GWCF

Since 1997, GiveWell Community Foundation (GWCF) and its fundholders have been investing in the future of our community through impactful, philanthropic giving.

OUR MISSION

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

OUR SERVICE AREA

In 2019-2020, 86% of all grants were awarded to nonprofits within our service area of Polk, Hardee, and Highlands counties.

"SPIRIT OF CENTRAL FLORIDA"

Pictured below, GWCF received United Way of Central Florida's 2019-2020 "Spirit of Central Florida." This award acknowledges an organization that has surpassed all expectations and exemplifies the giving spirit in Central Florida.

2019-20 Highlights

GRANT DISTRIBUTION

\$23.6 M

GRANTS MADE

1,072

NEW FUNDS

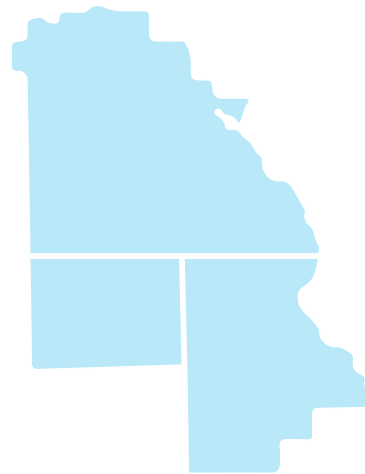
34

NEW GIFTS

\$22 M

TOTAL ASSETS

\$200 M



Funds at GWCF

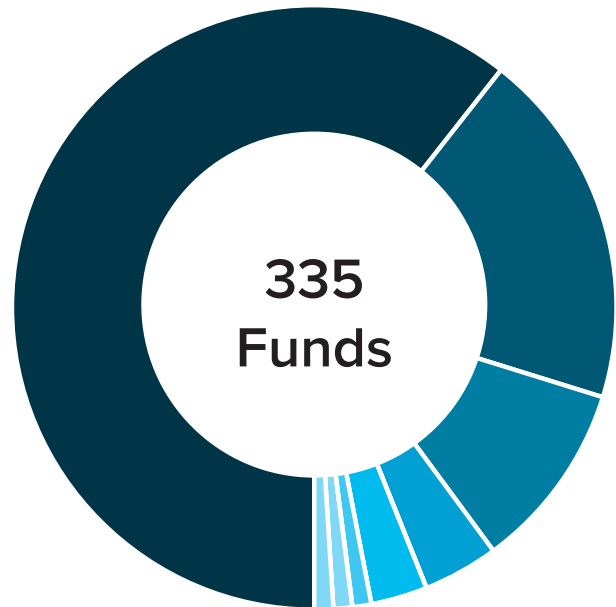
NEW FUNDS

34

Funds By Type

As of June 30, 2020

- 45% Donor Advised Funds
- 22% Agency Funds
- 11% Designated Funds
- 8% Community Funds
- 8% Legacy Funds
- 3% Memorial Funds
- 2% Field of Interest Funds
- 1% Scholarship Fund & GWCF Unrestricted Fund

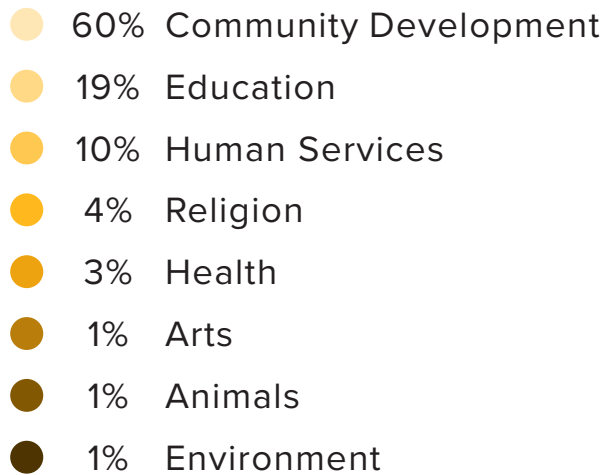


- **Donor Advised Funds** are established by donors who retain the right to recommend grants to nonprofits.
- **Agency Funds** are created by nonprofits to protect and invest their assets for the future of their work and mission.
- **Designated Funds** are established to benefit a particular organization or project.
- **Community Funds** allow municipalities, local service clubs, and community groups to improve quality of life of our area.
- **Legacy Funds** allow donors to leave a legacy of giving by incorporating charitable giving into their estate plans.
- **Memorial Funds** honor a loved one by supporting causes or nonprofits which would have pleased that person.
- **Field of Interest Funds** create a resource to target an area of interest to the donor, such as education or arts and culture.
- **Scholarship Funds** help students at a specific school or in a particular curriculum in furthering their education.
- **GWCF Unrestricted Fund** enables GWCF to address current community needs and allows the public to participate by pooling donations.

Grantmaking

Grants By Type

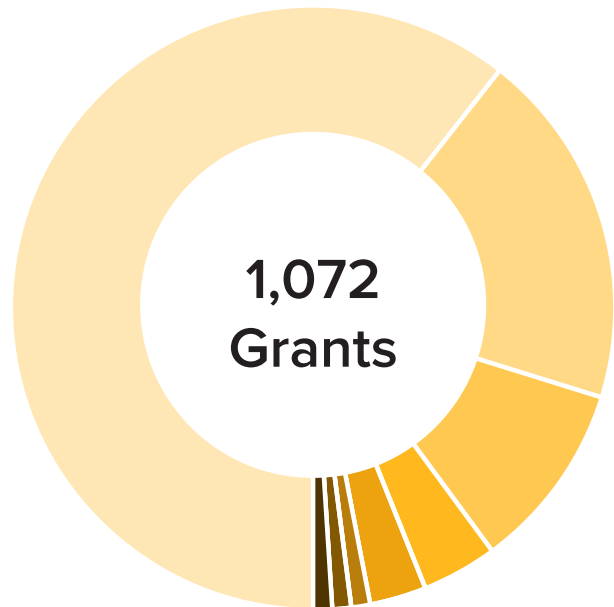
July 1, 2019 - June 30, 2020



GRANTS IN 2019-2020*

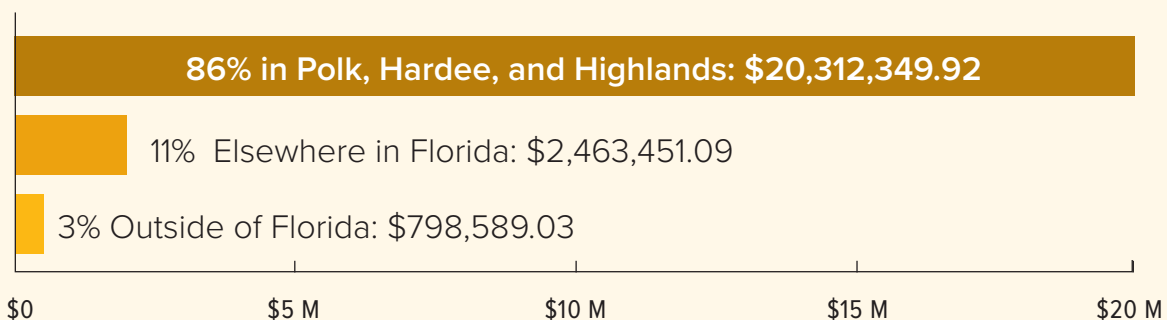
\$23,574,390

**Includes grants from agency funds, and excludes interfund transfers.*



Where GWCF grants went in 2019-2020

While GWCF's focus is Polk, Hardee, and Highlands counties, our fundholders may use their funds to support organizations and causes they care about beyond our service area. See where distributions went in 2019-2020:



Empower Polk

Established in 2018, Empower Polk is an annual competitive grant program of the GiveWell Community Foundation with the goal of empowering nonprofit organizations to become more efficient and sustainable.

TOTAL GRANTED

\$90 K

NONPROFITS

29

Funding for the Empower Polk grant cycle is made possible by contributions made by our fundholders and the public to our Unrestricted Grant Fund.

One hundred percent of all contributions go directly towards empowering local nonprofits. Visit givecf.org/donate to make a donation online. Donor advised fundholders can also contribute to Empower Polk from their fund.

Due to limited program funding, Empower Polk is currently only available to organizations with an established agency fund within GiveWell Community Foundation.



Nonprofits tell us that capacity building funding - like grants from Empower Polk - is incredibly important and difficult to find.

Visit our YouTube Channel to watch and learn how Empower Polk grants are making a difference in our community.



\$90,958.15 was awarded to the following 29 nonprofits through Empower Polk 2020:

\$2,363.18 - A Woman's Choice

for upgrades to donor website

\$3,000 - Achievement Academy

for strategic planning

\$4,000 - Alliance for Independence

for computer upgrades

\$4,951 - Bonnet Springs Park

for technology and training

\$2,600 - Boys & Girls Clubs of Polk County

for marketing/outreach materials

\$3,500 - Camp Fire USA Sunshine Council

for technology upgrades

\$5,000 - Central Florida Speech & Hearing Center

for updated medical records software

\$2,000 - Circle of Friends Ministry

for organizational consulting and marketing upgrades

\$3,200 - Cornerstone Hospice Foundation

for leadership training for managers

\$5,000 - Explorations V Children's Museum

for integration of software systems

\$3,500 - Family Literacy Academy at Lake Wales

for branding refresh

\$1,348 - Girls Inc. of Winter Haven

for donor management software

\$2,500 - Gospel Inc.

for video fundraising campaign

\$4,544 - Humane Society of Polk County

for computer and software upgrades

\$2,044 - Imperial Symphony Orchestra

for technology upgrades

\$3,500 - InnerAct Alliance

for technology and marketing upgrades and board training

\$924.97 - Junior League of Greater Lakeland

for video projector and screen

\$5,000 - kidsPACK

for donor software upgrade

\$2,000 - Lakeland Choral Society

for strategic marketing plan

\$3,800 - Lakeland Community Theatre

for video projector upgrade

\$1,600 - LkldNow.com

for staff training

\$3,000 - Parker Street Ministries

for digital communications and human resources training for staff

\$2,500 - Peace River Center

for public awareness video campaign

\$2,287 - Polk Education Foundation

for outdoor signage upgrades

\$4,425 - SPCA Florida

for medical equipment (autoclave)

\$1,371 - Talbot House Ministries of Lakeland

for volunteer software upgrade

\$3,500 - Volunteers in Service to the Elderly

for computer upgrades

\$2,500 - Women's Resource Center

for board training

\$5,000 - YMCA of West Central Florida

for medical equipment (defibrillators) and training

Impact Polk

Impact Polk is an annual competitive, donor-directed grant program with the goal of addressing community needs throughout Polk County. Impact Polk supports a broad range of needs, such as arts and culture, animal welfare, education, environmental stewardship, health, and human services.

TOTAL GRANTED

\$570 K

NONPROFITS

87

Through Impact Polk 2020, the George W. Jenkins Fund within GiveWell Community Foundation fully or partially funded 87 nonprofit programs totaling \$569,713.45. We are grateful for the George W. Jenkins Fund's ongoing support of the Impact Polk grant cycle.

The following programs received full or partial funding through the Impact Polk 2020 grant cycle:

\$5,000 - 1st Veterans' Kids Care - Youth Eyecare Services (Y.E.S) Vision and Literacy Initiative

\$5,000 - A Community Pregnancy Center - Earn While You Learn Parenting Program

\$5,000 - A Woman's Choice - Teen Impact Summer Abstinence Education Program 2020

\$3,000 - Aerospace Center for Excellence - STEM Fusion

\$2,500 - Alzheimer's Association (Florida Gulf Coast's Chapter) - All About the Brain: Community Education And Risk Reduction

\$10,000 - Anchor House Ministries - Transition to Success

\$1,500 - Better Tomorrows - After School Program

\$10,000 - Big Brothers Big Sisters of Tampa Bay - Project to Increase our Numbers of Quality Volunteers in Polk County

\$5,000 - Bok Tower Gardens - Bok Discovery Boxes Program

\$10,000 - Boys and Girls Club of Polk County - Stop the GRUMBLING

\$9,297 - Camp Fire U.S.A. Sunshine Council - Service-Learning Trips

\$5,000 - Camp Gilead CBM Ministries of Florida - Camper Scholarships

\$3,000 - Center for Independent Living in Central Florida - Project SEARCH program

\$5,000 - Central Florida Health Care - Improving Nutritional Choices and Health through Community Teaching Kitchen

\$5,000 - Central Florida Speech and Hearing - Hear It To Say It

\$11,400 - Children's Home Society of Florida - Parents as Partners Support Group

\$2,500 - Christian Family & Youth Services - Computer Lab

\$5,000 - Cypress Junction Montessori - Early Education Scholarship Fund

\$3,000 - Destiknee Place - Helping Pre- and Post-Incarcerated Women Regain Their Lives for a Brighter Future

\$5,000 - Eckerd Youth Alternatives - A Second Chance at a Complete 180

\$5,000 - ElderPoint Ministries - Growing Senior Produce Markets

\$5,000 - Explorations V Children's Museum - Camp Explorations

\$15,000 - Faith in Action North Lakeland - Great Opportunity to Serve Our Ailing Seniors

\$10,000 - Faith Without Works - Camp Compassion 2k20

\$5,000 - FAM Church - Migrant Camp Worker Food Sovereignty Program

\$5,000 - Family Literacy Academy at Lake Wales - The Arts and At-Risk Children II

\$5,000 - Florence Villa Community Development Corporation - Youth Leadership Development Program

\$5,000 - Florida Baptist Children Homes - Lakeland Campus Summer Program

\$15,000 - Florida Dance Theatre - Movement Discovery Project

\$5,000 - Florida Sheriffs Youth Ranches - Harmony in the Streets Polk County

\$5,000 - Florida Southern College - Giving Polk County Children with Dyslexia the Tools to Achieve Success

\$3,000 - Frostproof Dawgs - Literacy for Athletes 2020

\$5,000 - Girl Scouts of West Central Florida - Rising Diamonds Program Support

\$20,000 - Good Shepherd Hospice - 2021 Camp Brave Heart

\$10,000 - Gospel Inc. - Advanced Sewing Job Training Internship

\$5,000 - Guardianship Office of the Tenth Circuit - Giving Hope to the Voiceless

\$10,000 - Healthy Start Coalition of Hardee, Highlands & Polk - Beds 4 Babies Project

\$3,000 - Hearing Loss Association of America (Lakeland) - Hearing Solutions for Deaf and Hard of Hearing Students

\$5,000 - Heart for Winter Haven - Scholarship Housing Community Network Jobs for Life Training

\$18,950 - Heartland for Children - Caregiver Support Program for Children in Foster Care

\$10,000 - HELP of Fort Meade - Supporting Our Community

\$5,000 - Hero Revolution - Be A H.E.R.O. for Greater Student Success

\$10,000 - Idols Aside Ministries - Sons Without Fathers Scholarships

\$5,000 - Jaylen's Challenge Foundation - East Polk's No Bullies in School

\$5,000 - Junior Achievement of Tampa Bay - JA Signature Hero's Effective Civic Leadership

\$1,000 - Keystone Challenge Fund - Financial Literacy & Homebuyer Education

\$15,000 - kidsPACK - Just Feed Kids

\$2,500 - Lake Wales Arts Council - 2020 Summer Arts Camp

\$2,500 - Lakeland Choral Society - Sing Polk

\$10,000 - Lakeland Community Theatre - Theatre Troupe for Individuals with Developmental Disabilities

\$10,000 - Lakeland Habitat for Humanity - Vets Helping Vets

\$5,000 - Lakeland Housing Authority - YouthBuild Lakeland 2020

\$5,000 - Lakeland Kiwanis Charitable Foundation - Stuff the Bus 2020

\$10,000 - Lakeland Police Athletic League - 30 Day of Stem-ulation and Mentoring Program

\$10,000 - Lakeland Volunteers in Medicine - Steps to Good Health

\$18,066.45 - Learning Resource Center of Polk County - Camp READY!

\$1,000 - Martin Luther King Jr Scholarship Committee - Helping with Books & Tuition for the College Students

\$5,000 - Meals on Wheels of Polk County - Angel Meal Program

\$5,000 - Mulberry Community Services Center - Personal Finance Center of Polk

\$7,500 - Museum of Science & Industry - Robot Round-Up

\$10,000 - Nemours Foundation - Healthy Habits in the First Five Years Phase 2

\$10,000 - New Life Center for Family Preservation - Homeless to Wholeness

\$2,000 - Options for Women Pregnancy Help Clinic - Community HIV Testing

\$2,500 - Paint Your Heart Out Lakeland - Initiative 2020

\$5,000 - Parker Street Ministries - Build a Healthy Community

\$5,000 - Peace River Center - Engaged, Restored, and Empowered through Art Therapy

\$10,000 - Platform Art - Platform Kids 2020/2021

\$10,000 - Polk County School Board - Supporting Students with Disabilities through Self-Regulation

\$5,000 - Polk County School Readiness Coalition - School Readiness Match

\$7,500 - Polk Education Foundation - Building Better Readers

\$5,000 - Polk State College Foundation - Encouraging Leadership and Integrity Through Education Mentoring

\$5,000 - Randy Roberts Foundation - 2020 Congressional Classroom

\$1,000 - READ Lakeland - Technology in the 21st Century

\$5,000 - Southern Guide Dogs - Guide and Service Dog Client Support

\$10,000 - SPCA Florida - Save the Pets of Polk

\$3,000 - Step It Up Ministries - Operation Homefront

\$2,500 - TLC PetSnip - Affordable Pet Care for Polk

\$2,500 - Top Buttons - Job Readiness and Capsule Collection Delivery Project

\$10,000 - Tri-County Human Services - Promises and Accountability Ending the Revolving Door

\$5,000 - Volunteers in Service to the Elderly - Helping Seniors Age in Place Using Technology and Volunteer Support

\$5,000 - Women's Resource Center of Florida - Financial Resilience Repair, Rebuild, and Save

\$20,000 - YMCA of West Central Florida - Kindergarten Learn to Swim

\$5,000 - Young Life of Polk County - Young Life Camp Scholarships

\$10,000 - Youth for Christ of Polk County - Summer Camping with At-Risk Youth

Responding to COVID-19

TOTAL GRANTED

\$610 K

GRANTS MADE

67

**UNITED
COMMUNITY
RELIEF FUND**



Anticipating COVID-19's effect on our communities, GiveWell Community Foundation partnered with United Way of Central Florida in March 2020 to establish the United Community Relief Fund. The Fund would support nonprofit organizations throughout Polk, Hardee, and Highlands counties who are serving those most vulnerable to the health and economic impact of the global pandemic.

GiveWell Community Foundation and United Way collaborated to raise funds and awareness, assess community needs, and distribute grants to organizations selected by a committee of volunteer leaders.

Initial grants from the United Community Relief Fund were distributed in April. 34 local nonprofit organizations received a

total of \$310,056.27. Funding priorities included food distribution, shelter assistance, childcare for essential workers, and personal protective and other health equipment.

At the time of publishing this report, additional grants have been distributed from the United Community Relief Fund for COVID-19-related needs. In September, \$300,740.19 was distributed to 33 nonprofits in September. So far, over \$600,000 has been raised and distributed for COVID-19 relief.

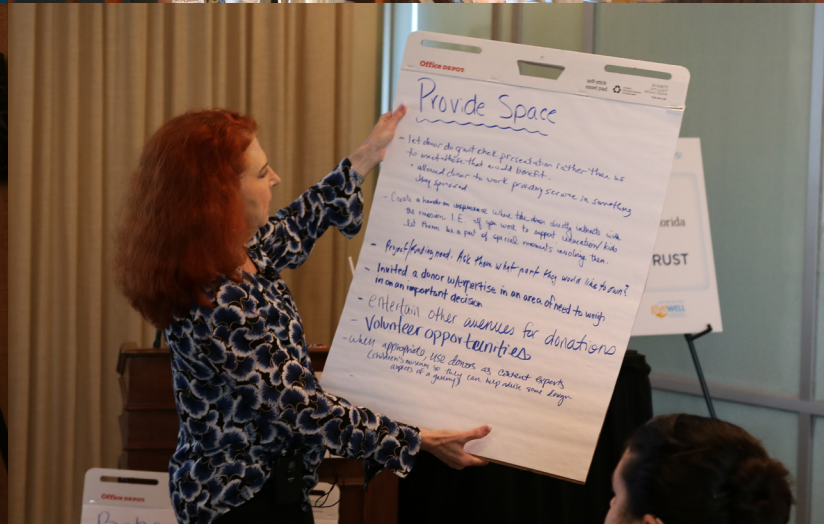
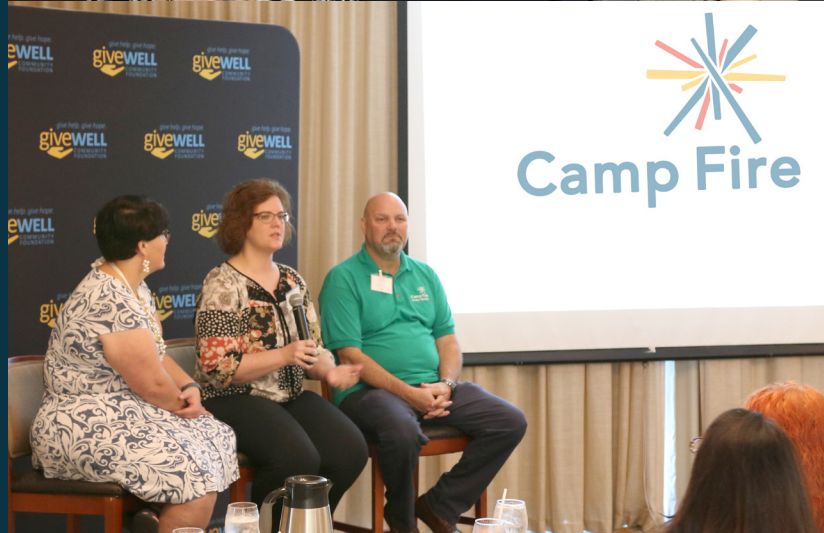
This relief funding has been made possible by more than 200 generous individuals who donated to the United Community Relief Fund. Visit unitedcommunityrelief.org to learn more.



3rd Annual Nonprofit Workshop

On October 25, 2019, nonprofit agency fundholders as well as members of the Association of Fundraising Professionals' Greater Polk County Chapter convened for the third annual Nonprofit Workshop.

Featured speakers included fundraising experts Kerry A. Bartlett, CFRE, MBA and Holly Parrish, CFRE, MPA and a panel discussion with Camp Fire U.S.A. Sunshine Council's executive director and board members.







On March 5, 2020, GiveWell Community Foundation celebrated its inaugural Toast. This new annual event is an opportunity to celebrate philanthropy with our generous fundholders and community partners.

Board chair, Jeff Cox, gave the first official "toast" where he recognized retiring President and CEO, Terry Simmers, and welcomed John Attaway, who stepped into Simmers' role on April 1, 2020.



Foundation Leadership

BOARD OF DIRECTORS

Jeffrey G. Cox, Sr.
BOARD CHAIR

Jack Hollis
VICE CHAIR

Anne Furr
SECRETARY

John "Jay" Gray, Jr.
TREASURER

Suzanne H. Moraco
IMMEDIATE PAST BOARD CHAIR

Ed Grossman
AUDIT COMMITTEE CHAIR

Jim Chaffin
INVESTMENT COMMITTEE CHAIR

Barney Barnett

Wesley Barnett

Bo Boyte

Bruce Davis

Bill Dorman

Kimberly Elmhorst

Doug McPherson

Roger Ingley

Tom Oldt

Renée Pobjecky

Thomas "Tim" Putnam

Linda Rich

Sandra Sheets

Jillian Spangler

Rick Stephens

Mark Turner

STAFF MEMBERS

John Attaway
PRESIDENT / CEO

Terry W. Simmers
RETIRING PRESIDENT / CEO

Lori Martini
*VICE PRESIDENT / CHIEF
PHILANTHROPIC OFFICER*

Angela Baragona, CPA
CONTROLLER

Brittany Graham
RECEPTIONIST

Johnna Martinez
GRANTS MANAGER

Christy Vreeland
OFFICE MANAGER

Dave Walter
COMMUNICATIONS MANAGER

Financial Summary

ASSETS

	<i>As of June 30, 2020</i>	<i>As of June 30, 2019</i>
Cash	\$30,576,578	\$6,575,751
Investments	\$165,987,760	\$182,629,866
Other Assets	\$3,152,785	\$3,287,513
Total Assets	\$ 199,717,123	\$192,493,130

LIABILITIES AND NET ASSETS

Current Liabilities	\$4,059,429	\$4,320,760
Funds Held as Agency Endowments	\$14,075,929	\$14,118,486
Long-Term Debt	\$100,942	\$0
Foundation Net Assets	\$181,480,823	\$174,053,884
Total Assets	\$199,717,123	\$192,143,130

REVENUE AND SUPPORT

Gifts Received	\$22,327,819	\$19,190,722
Net Investment Returns	\$6,270,304	\$10,739,928
Total Revenue and Support	\$28,598,123	\$29,930,650

GRANTS AND EXPENSES

Grants Awarded and Programs	\$20,228,803	\$15,524,341
Support Services	\$942,379	\$890,349
Total Grants and Expenses	\$21,171,182	\$16,414,690

NET ASSET SUMMARY

Change in Net Assets	\$7,426,941	\$13,515,960
Net Assets at Beginning of Year	\$174,053,882	\$160,537,922
Total Net Assets	\$ 181,480,823	\$174,053,882

give help. give hope. give well.



GiveWell Community Foundation
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Lakeland, Florida 33803
863-683-3131 | givecf.org



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