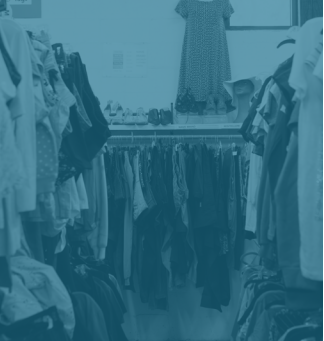




ANNUAL REPORT

2024 - 2025

Serving Polk, Hardee, and Highlands Counties



CFNS

ACCREDITED
FOUNDATION

MESSAGE FROM THE PRESIDENT/CEO

Dear fundholders and community partners,

As we reflect on another successful year for GiveWell Community Foundation, we are proud to share stories of impact and new opportunities to make lasting change. Amid political transition, market uncertainty, and an active hurricane season, we did what community foundations do best: leaned into our communities.

Our donors stepped up, granting more than \$54 million to 600 organizations. Eighty percent of those organizations are based in our tri-county area serving Polk, Highlands, and Hardee counties. Your philanthropy reflects the unwavering spirit of our community.

In summer of 2025, we launched the United Community Indicators (UCI), in partnership with United Way of Central Florida. This data dashboard allows us to track trends and bring our collective resources and voice to the most pressing local issues. We recognize that local needs will evolve over time, and we will be here to meet those needs.

In tandem with the UCI, GiveWell Community Foundation established Now & Forever Funds in each of our respective counties to build permanent and sustainable funding sources to amplify our impact. Thanks to your support and a generous dollar-for-dollar match, we plan to kick off our first Now & Forever grant cycle in 2026 while continuing to seek donations. These efforts are further detailed in the pages of this report.

Other highlights include the tremendous work of the Polk Milton Recovery Committee, the freshly-launched GiveWell Community Foundation Legacy Society, and the extended reach of our Empower capacity-building grants.

To our donors, nonprofit leaders, staff, board members, past and present, and community partners, thank you! The best is yet to come, and we remain committed to staying the course and improving the quality of life in the areas we serve both now and for future generations.



Callie

Callie Neslund
President/CEO

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ABOUT US

GiveWell Community Foundation (GWCF) serves Polk, Hardee, and Highlands counties in central Florida, working with individuals, families, businesses, nonprofits, and other organizations to build stronger communities through charitable funds and competitive grant cycles.

To address critical community needs both now and for generations to come, we build and manage permanent endowments. In addition, we connect donors to nonprofit needs, provide leadership on critical community issues, and help donors invest in the future through impactful, philanthropic giving that creates a lasting legacy.

Since its founding in 1997, the Community Foundation has awarded more than \$450 million in grants. Today, GWCF is home to more than 400 charitable funds and the Impact Polk and Empower grant cycles.



OUR MISSION

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



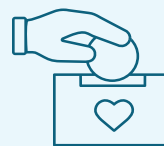
FISCAL YEAR HIGHLIGHTS



New Funds
28



Total Assets
\$669 M



Total Contributions
\$59 M

Confirmed in Compliance with Community Foundations National Standards.

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FOUNDATION

OUR GRANTS

Impactful grantmaking is at the heart of the Community Foundation’s work. During the 2024-2025 fiscal year, **600 nonprofit organizations** received grants from our fundholders.

While our service area is Polk, Hardee, and Highlands counties, GWCF fundholders may advise their funds to support organizations and causes they care about well beyond this geographic area.

GRANTS THIS FISCAL YEAR



Grant Total
\$54 M



Grants Made
1,736



**Grants Within
Service Area**
80%

Grants by Cause

- Human Services 27%
- Education 23%
- Community Development 20%
- Arts & Culture 11%
- Religion 9%
- Health 9%
- Environment 1%
- Animal Welfare <1%



EMPOWER HARDEE, HIGHLANDS & POLK

Empower Hardee, Highlands & Polk is GiveWell Community Foundation's annual, invitation-only, competitive grant program that is made possible by donor support. In total, \$159,610 was awarded through the Empower Hardee, Highlands & Polk 2025 grant cycle. Forty nonprofit organizations received grants ranging from \$1,316 to \$5,720.

The goal of the Empower grant program is to help nonprofits become more efficient and sustainable by funding capacity-building investments such as technology upgrades, board and staff training, and strategic planning. Nonprofits can have difficulty setting aside or locating the funding for improvements like these, which is why the Empower grants can make a lasting impact within an organization, helping them better serve our community.

To learn more and support the Empower Hardee, Highlands & Polk grant cycle, please visit givecf.org/empower.

THE MISSION OF WINTER HAVEN

Empower Grant: Nourishment Center Expansion, which included installing evidence-based activity centers for families with children for engaging and developmentally-appropriate activities that promote learning, creativity, and social interaction.

Story provided by Arlene Berry of The Mission

It was heartwarming to see that in the midst of our choice food pantry, there's a beautiful moment that often goes unnoticed—a child lost in play, exploring a world far removed from the worries of food insecurity. While parents carefully select the groceries that will sustain their family, this little one finds joy in a sensory wall toy, blissfully unaware of the reason they're here.

For us, this image represents so much more than food. This child doesn't know they're in a food pantry or that their family is facing a challenging season. And that's exactly as it should be. As we provide these essentials, we hold onto a bigger vision—that these moments of play and laughter are steps toward a brighter tomorrow.

In our hearts, we see the potential within every child we serve: future doctors, teachers, artists, builders, and maybe even nonprofit leaders. With a healthy meal in their home, a stable environment, and a supportive community, we believe they can achieve all this and more. One day, they'll look back and perhaps never even realize they visited a food pantry; instead, they'll remember a time filled with love, support, and hope.

This is why we do what we do. Because every family deserves the dignity of choice, and every child deserves a safe space to be a kid—even in times of struggle.





EMPOWER GRANTEES

A Woman's Choice

Achievement Academy

Alliance for Independence

Bonnet Springs Park

Boys & Girls Clubs of Polk County

Camp Fire U.S.A. Sunshine Council

CareerSource Polk

Central Florida Speech and Hearing Center

Cornerstone Hospice Foundation

Cutting Edge Ministries

Drug Prevention Resource Center dba InnerAct Alliance

Florida Children's Museum

Gospel, Inc.

Hands For Homeless

Hardee Help Center

Harrison Center for the Arts Parents Association

Junior Achievement of Tampa Bay

Junior League of Greater Lakeland

kidsPACK

Lakeland Community Theatre

Lakeland LEADs Partnership dba ConnectedED Polk

Lakeland Police Foundation

Lakeland Volunteers in Medicine

Learning Resource Center

Lighthouse for the Blind and Low Vision

Meals on Wheels of Polk County

Options for Women Pregnancy Help Clinic

Polk Ecumenical Action Council for Empowerment

Parker Street Ministries

Peace River Center

Polk Education Foundation

Recover Hardee

Samaritan's Touch Care Center

Talbot House Ministries

The Mission of Winter Haven

Volunteers in Service to the Elderly

Women's Resource Center

YMCA of West Central Florida

Youth for Christ of Polk County

IMPACT POLK GRANT CYCLE

Impact Polk, an annual competitive, donor-directed grant program of GiveWell Community Foundation, awarded a total of \$665,933 to 92 local nonprofit organizations this year. With the goal of addressing community needs throughout Polk County, Impact Polk grants support a broad range of needs, such as health & human services, education, arts & culture, and animal welfare. Thanks to the George W. Jenkins Fund, the Bell-Barnett Family Fund, and the Leland Bryan Fund within GiveWell Community Foundation for helping to make an impact on **404,000 individuals** in our community! More information on this grant cycle can be found at impactpolk.org.



LAKE WALES LITTLE THEATRE

The Lake Wales Little Theatre has a thriving children and teen theatre where every child who wants to participate gets a part. The experience of being on stage gives each child a feeling of confidence, accomplishment, and excitement. Teens learn how a theatre works, by running everything from tech, stage management, to acting on stage. The goal of the Lake Wales Little Theatre is to create quality productions that the students and audiences will enjoy. Productions have included a teen production of *Just Another High School Play*, a children's production of *Stuck on These Islands*, and a theatre tot production of *The Hungry Little Caterpillar*.

YMCA OF WEST CENTRAL FLORIDA

The YMCA has worked for several years to provide safe water education and swim lessons to kindergarten children in partnership with Polk County Public Schools and other donors. They provide the Safety Around Water Curriculum to approximately 1,600 kindergarteners. One story shows how the program positively impacted an entire family. Sarah's parents never learned to swim themselves, so they were determined to ensure their daughter wouldn't face the same fear of water. After completing the YMCA's Kindergarten Learn to Swim program, Sarah not only became a confident swimmer but also inspired her parents to overcome their fears and join her in the pool.





FAITH XTREME

Faith Xtreme works with kids from at-risk areas of the Inwood, Jan Phyl, Eloise, Lake Shipp, and Wahneta areas of Winter Haven and develops relationships with the children and their families, providing a unique insight into their needs. They identify children and families in need of housing, and utility or food assistance in under-served, under-privileged areas near Winter Haven. Through Impact Polk grant funding, more than 500 people were provided with food and assistance. In addition, Faith Xtreme conducts after-school clubs every school day, from elementary through high school and beyond, giving kids an opportunity to have a safe place to play, eat a nutritious meal and socialize. In the Resource Center, families are able to select food, clothing, shoes, and household items.

LAKELAND POLICE ATHLETIC LEAGUE (PAL)

PAL's 45-day Mentoring Program, in collaboration with CareerSource Polk, focuses on at-risk youth from Lakeland's most impoverished crime-ridden neighborhoods who are at risk for delinquency, crime, and gang recruiting during the summer months. The program equips them with skills they need to secure employment opportunities for career advancement in their local labor market. Daily classroom instruction with staff facilitators, field trips, community service projects, life skills training, individual sport coaching and one-on-one mentoring is provided for each participant. After completing the program, several students expressed a desire to pursue apprenticeships or technical school education.



COMMUNITY CLINIC GRANTS

This year, Angels Care Center of Eloise, The Haley Center, and Central Florida Health Care were selected to receive a combined total of nearly \$25,000 in grants through GiveWell Community Foundation's Community Clinic Grant Program. These grants are specifically for nonprofit clinics that offer medical, hospital, or other care for sick and injured persons in the Winter Haven area who are not financially able to obtain medical care.

Over the last 19 years, this program has awarded more than \$200,000, thanks to annual funding from the Yardley, England, Trimmer, and Orlich Charities Fund at the Central Florida Foundation. In 2025, the program also received funding from the Bell-Barnett Family Fund and the Frank and Winn Merritt Fund within GiveWell Community Foundation. This support helps these clinics provide services to those in need.



UNITED COMMUNITY RELIEF FUND



In October 2024, parts of our community were severely impacted by Hurricane Milton. As with many major storms, recovery and rebuilding continues long after the initial danger has passed. Immediately after the storm, GiveWell Community Foundation (GWCF) and United Way of Central Florida (UWCF) surveyed local nonprofit organizations to determine the most pressing post-hurricane needs. As a result, 11 organizations at the heart of recovery efforts received \$80,000 in hurricane relief grants from the United Community Relief Fund. This fund was established by GWCF and UWCF, and supports local nonprofits providing services to those affected by disasters impacting our community.

Because of the longer-term impacts in Polk County, GWCF and UWCF established the Polk Milton Recovery Committee to ensure collaboration of efforts. Other key participants include local governments and nonprofits, as well as Rebuilding Together Greater Florida (RTGF), which has been instrumental in assisting residents whose homes were damaged by the hurricane. Together, GWCF fundholders and UWCF contributed \$100,000 to the UCRF, with RTGF matching another \$100,000, enabling \$200,000 total for home repairs.

Other joint UWCF/GWCF efforts included community events that connected residents with resources and organizations working to make hurricane-damaged homes safe and livable. We are proud to serve as convenors and collaborators with other community-focused organizations, and remain committed to supporting nonprofit organizations during challenging times.

UNITED COMMUNITY RELIEF FUND





**Economy &
Employment**



Education



Food Security



Housing



Quality of Life



**Transportation &
Infrastructure**

UNITED COMMUNITY INDICATORS

This year marked the development of the United Community Indicators dashboard, the next phase of the United Community Needs Assessment project, a collaborative initiative of GiveWell Community Foundation and United Way of Central Florida. The dashboard is an online interactive tool that provides snapshots of the most pressing needs across Hardee, Highlands, and Polk counties.

To help us better understand these community challenges, the dashboard provides visual representations of the six priority areas of focus that were identified through the needs assessment: economy & employment, education, food security, housing, quality of life, and transportation & infrastructure.

Donors now have an additional tool that highlights community needs. They can use this information to identify priority areas where they can engage and make a difference. In addition, by tracking trends and impact through current data, this resource helps nonprofits and other partners in the tri-county area determine solutions, and helps guide conversations toward creating meaningful change in the lives of those in our community.

To learn more about community needs, visit ucindicators.org.

UNITED COMMUNITY INDICATORS

HARDEE • HIGHLANDS • POLK

Presented by GiveWell Community Foundation & United Way of Central Florida

GIVING FORWARD



GiveWell Community Foundation (GWCF) and its donors and fundholders have been investing in the future of our communities through impactful, philanthropic giving since 1997. We are deeply grateful to all who have joined us, past and present, in advancing our mission and strengthening our role as a trusted community leader.

One of the most powerful ways to ensure that the Community Foundation continues to be a lasting source of hope and investment is through permanent funding sources. These endowments allow us to respond to the evolving needs of our community today and for generations to come.

For years, two key endowment funds have played a vital role in sustaining both our organization and local non-profits:

- The **Community Endowment Fund** provides a diversified, stable source of support for GWCF's operations, ensuring that our work remains strong and sustainable.
- The **Grant Committee Endowment Fund** empowers local nonprofits through capacity-building grants supporting access to training, technology, and other operational tools that strengthen their mission and efficiency. Through this fund, the Empower grant cycle has distributed nearly \$1 million in eight years, helping organizations expand their reach and serve our most vulnerable residents.

This year, we expanded our commitment to long-term community impact with the creation of **Now & Forever Funds**—dedicated endowments for each of the counties we serve: Polk, Hardee, and Highlands. These funds will address the most pressing and relevant needs in our community as identified through the United Community Indicators (UCI) dashboard. Now & Forever grants will help proven programs scale, and inspire innovative, transformative solutions that make a lasting difference.

To strengthen these three endowment funds, we've launched the **Giving Forward** campaign—an invitation for our community to co-invest in a stronger, more resilient future for the people and places we care about most. Thanks to the generosity of an anonymous donor, the first \$5 million contributed will be matched 1:1. Contributions can be made at givecf.org/donate.

Together, by building these permanent sources of support, we can ensure a thriving quality of life across Polk, Highlands, and Hardee counties for generations to come.

TOAST 2025

In the beautiful setting of Bonnet Springs Park, GiveWell Community Foundation fundholders and friends gathered for a special evening to celebrate philanthropy. We paid tribute to the donors, fundholders, nonprofits, and other partners who improve the quality of life for those in our community throughout the year.





GIVEWELL COMMUNITY FOUNDATION

LEGACY SOCIETY

At GiveWell Community Foundation, we believe in the power of philanthropy to change lives, not just today, but for years to come. Our latest initiative gives those who are passionate about that idea the opportunity to join with other like-minded people to become more engaged and give back to our community.

The GiveWell Community Foundation Legacy Society is open to anyone who has chosen to make a lasting impact by committing to making a future gift to the Community Foundation (either an outright gift, or part of an estate plan). Legacy Society members are inspired to ensure that their legacy of philanthropy continues for the causes that matter to them.

As a trusted partner, the Community Foundation stewards legacy gifts so donors can be confident that future grants ultimately reflect their wishes. Because honoring donor intent is one of our core principles, we invite Legacy Society members to share what inspires their giving. By telling us why they are passionate about the causes they care about, we can ensure their stories live on and inspire those who will benefit from their generosity.

In addition to engaging with others who have made these commitments, Legacy Society members also have opportunities to learn more about philanthropy and how to make a lasting impact on our community.

For more information about becoming a member, please visit givecf.org/legacy-society.



“THE LEGACY SOCIETY IS A WONDERFUL GROUP OF LIKE-MINDED PEOPLE WHO GIVE BACK TO THEIR COMMUNITY THAT CREATES A BETTER QUALITY OF LIFE FOR OTHERS. I AM GRATEFUL FOR THE SOCIAL INTERACTION, PHILANTHROPIC GUIDANCE AND VISIBLE IMPACT THE LEGACY SOCIETY OFFERS TO ITS MEMBERS.”

- Mark Miller, Legacy Society Member

LEAVING A LEGACY

Sharon Miller

Some people inspire us by living lives filled with devotion to family, loyalty to friends, and commitment to community. Sharon Miller was the embodiment of a generous, caring person who believed that for those whom much is given, much is expected. In addition to her lengthy career with Publix Super Markets, Inc., and Publix Super Markets Charities, Sharon dedicated time and resources to countless community organizations and was honored with many awards during her lifetime.

She recognized the importance of giving back, and that spirit of generosity led her to create the Sharon A. Miller Fund at GiveWell Community Foundation. By establishing this legacy fund as part of her estate plan, Sharon was able to thoughtfully make clear her wishes and intent, ensuring that the causes she was passionate about would benefit from her generosity for years to come.

So far, nearly \$3 million has been granted to 24 different nonprofit organizations since 2023. These gifts have already touched many lives and will continue to be impactful in the years ahead. Sharon's vision and commitment to the causes she cared about is inspiring to all of us. We are honored to help fulfill her desire to support the community she loved, ensuring that her philanthropic legacy lives on.



Friends of the Foundation

At this year's Friends of the Foundation event, fundholders and community partners celebrated philanthropy and the spirit of giving. This annual event provides a wonderful opportunity for friends in the eastern region of our service area to connect and to hear updates from the Community Foundation.





FUNDS OF THE FOUNDATION

Types of Funds

Donors who wish to establish funds at the Community Foundation have a number of giving options. This year, 28 new funds were created by individuals, families, and nonprofit organizations to help meet their charitable goals.

Donor-Advised Funds allow donors to participate in the funding process by suggesting grants to nonprofits. Individuals, families, businesses, and community groups often establish this type of fund, which offers convenience and flexibility to support various charitable organizations over time.

Agency Funds are created by nonprofit organizations to protect and invest their assets for the future of their work and mission.

Designated Funds are established to benefit a particular organization. Donors who establish designated funds ensure continuous gifts to their favorite charitable organization.

Legacy Funds allow donors to leave a legacy by incorporating charitable giving into their estate plans. These are funded upon the donor's passing.

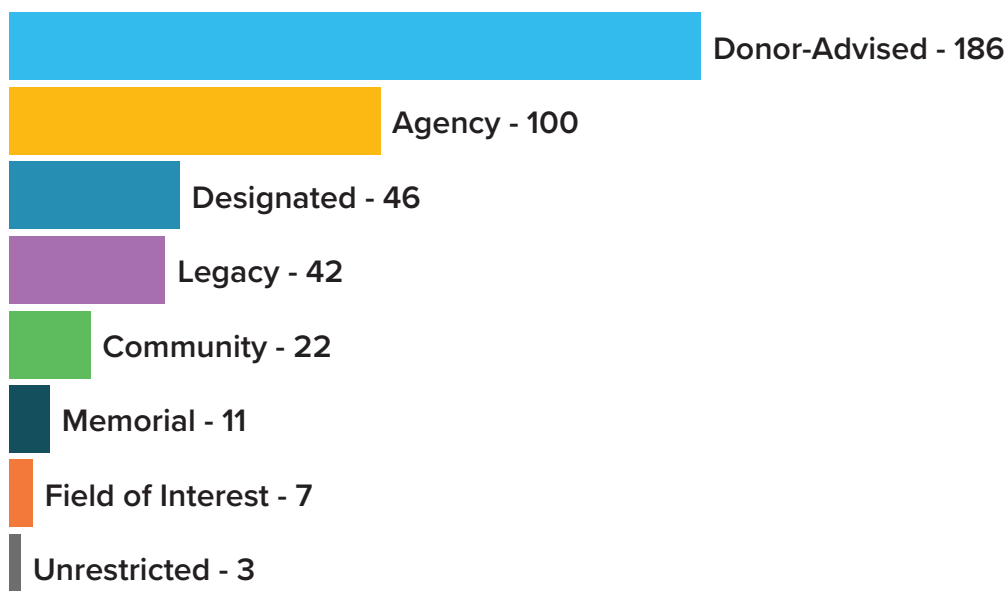
Community Funds allow municipalities, local service clubs, and community groups to improve the quality of life in our area.

Memorial Funds honor a loved one by supporting causes or specific nonprofits which would have been meaningful to that person.

Field of Interest Funds allow donors to support broad areas of interest, such as education, housing, food security, or quality of life.

Unrestricted Funds enable GWCF to address current community needs and allow the public to participate by pooling donations.

Funds by Type



COMMUNITY IMPACT



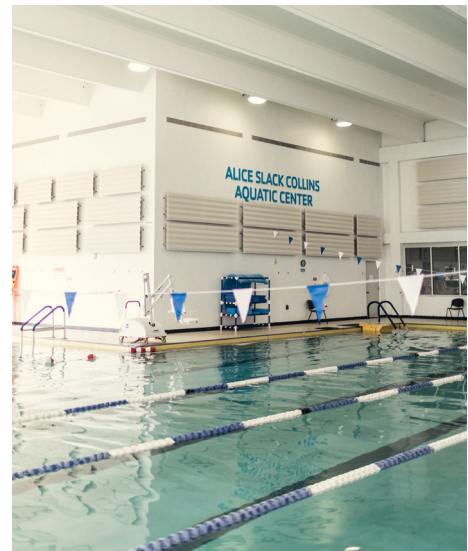
This year's accomplishments are made possible by our fundholders, donors, and nonprofit and community partners. Fundholders with donor-advised funds have the flexibility to give back and make a difference in causes that are important to them, while also helping with unexpected needs that arise in our community.

In addition, Community Foundation donors have been rallying behind capital campaigns of local nonprofits that are stepping up to meet the demands for services that come with our growing population. Many of the needs correlate with areas identified through the United Community Needs Assessment.

Included in this group of longstanding community partners making these essential investments are Boys & Girls Club of Polk County; Florida Southern College; Gospel, Inc.; Lakeland Regional Health Foundation; Parker Street Ministries; The Salvation Army, West Polk County; and YMCA of West Central Florida.

We're also proud to partner with many local nonprofit organizations that are providing valuable services, while trusting the Community Foundation to steward their assets through agency and community funds.

Our community is better thanks to the individuals and organizations that are committed to identifying needs, finding solutions, and investing in the future.



2024 - 2025 BOARD OF DIRECTORS

Kimberly Elmhorst

Board Chairman

Wesley Barnett

Vice Chairman

Doug McPherson

Treasurer

Jason Rodda

Secretary

Jay Gray

Immediate Past Chairman

James Previte

Audit Committee Chair

Tom Oldt

Investment Committee Chair

Barney Barnett

Member at Large

Ann Barnhart

Bo Boyte

Jackie Byrd

Bruce Davis

Jack Harrell III

Jack Hollis

Christina Criser Jackson

Kristen Labbe

Katrina Lunsford

Jerry Mixon

Garrett Roberts

Shannon Sapp

Sandra Sheets

Jillian Spangler

**Katherine Sultenfuss
Schichtel**

Ex Officio

FOUNDATION STAFF

Callie Neslund

President / CEO

Lori Martini

*Vice President / Chief
Philanthropic Officer*

Dorena Geary, CPA

Chief Financial Officer

John Attaway

Counsel

Gabby Fazekas

*Philanthropic Services
Manager*

Sanda Groendal

Receptionist

Sara Hallett

Communications Manager

Johnna Martinez

Grants Manager

Christy Vreeland

Office Manager

FINANCIAL SUMMARY

Assets

	<i>FY 2024-2025</i>	<i>FY 2023-2024</i>
Cash	\$ 26,491,668	\$ 28,399,541
Investments	607,367,270	559,354,343
Other Assets	36,003,866	33,142,011
Total Assets	\$ 669,862,804	\$ 620,895,895

Liabilities and Net Assets

Current Liabilities	\$ 9,596,911	\$ 8,211,201
Funds Held as Agency Endowments	59,401,715	51,315,598
Foundation Net Assets	600,864,178	561,369,096
Total Liabilities and Net Assets	\$ 669,862,804	\$ 620,895,895

Revenue and Support

Gifts Received	\$ 39,361,341	\$ 148,486,089
Net Investment Returns	63,181,112	49,187,611
Total Revenue and Support	\$ 102,542,453	\$ 197,673,700

Grants and Expenses

Grants Awarded and Programs	\$ 63,833,472	\$ 72,731,278
Support Services	1,213,899	1,098,989
Total Grants and Expenses	\$ 65,047,371	\$ 73,830,267

Donor-Restricted Net Assets

Restricted Contributions	\$ 2,000,000	\$ 11,452,087
Total Restricted Contributions	\$ 2,000,000	\$ 11,452,087

Net Asset Summary

Change in Net Assets	\$ 39,495,082	\$ 135,295,520
Net Assets Beginning of Year	561,369,096	426,073,576
Total Net Assets	\$ 600,864,178	\$ 561,369,096

Independent Auditor: Ramos & Floyd CPAs PLLC



GiveWell Community Foundation

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Scan the QR code or visit
givecf.org/report for an online
version of this annual report.