Community Foundation of North Central Florida

2014

Report to the Community

Promoting and sustaining philanthropy among the North Central Florida community since 1998
“The true meaning of life is to plant trees, under whose shade you do not expect to sit.”

Nelson Henderson
Dear Friends,

The Community Foundation of North Central Florida is about philanthropy and helping individuals fulfill their charitable passions and missions. We do that by making it possible for donors to participate in creating permanent funds to meet current and future needs.

Community Foundations, such as ours, have become catalysts for improvement through philanthropy. We help you help others today and in the future. We help donors become strategic philanthropists.

In our short history, the Community Foundation of North Central Florida has provided more than $9,000,000 in grants, helped donors create funds for their special causes and maintained strong financial management of growing endowment funds. We have been happy to serve our donors in their quests to improve the community and the lives of others.

It is easy to work with the Community Foundation of North Central Florida. Whatever your interests, we can help you fulfill your own community legacy.

Thank you

Barzella Papa
In April 2014, the Community Foundation officially opened its permanent home. The foundation received a $500,000 donation from Nancy Perry, a past member of the Foundation’s Board of Directors. This donation allowed the Foundation to purchase a 3,800 square foot facility in the 3900 block of West Newberry Road.
Aside from offices for the foundation’s staff, the new facility has a training room and board room for local nonprofits to use. Charles Perry Partners, Inc. handled the construction, which was completed in early 2014.

More than 200 guests joined as we cut the ribbon, beginning a new chapter in the life of the Community Foundation.
One of the Community Foundation’s focus is the strength of our local nonprofit community. In the spring of 2014, the Community Foundation of North Central Florida awarded a grant to the Guardian Ad Litem Foundation for capacity building.

Through this grant, the Guardian Foundation was able to streamline its administration in order to increase productivity. Specifically, the Guardian Foundation was able to compose a strategic plan, which would set goals for the future.

Guardian Foundation recognizes the needs of children in the 8th judicial circuit who are involved in dependency proceedings in court as a result of abuse, neglect, or abandonment.

While Guardian Ad Litem volunteers are appointed by the court to advocate for the child’s best interests, the foundation provides resources to help normalize the lives of these children by offering them the same opportunities afforded to children outside the system.
AMI Kids of Gainesville

The mission of AMIkids is to protect public safety and positively impact as many youth as possible through the efforts of an innovative staff, partnerships with youth agencies, connections to local communities, and help of families. Through the work of AMIkids, more than 122,000 boys and girls have been given life changing opportunities to break the cycle of poverty.

AMIkids of Gainesville offers an alternative to traditional incarceration, by combining education, behavior modification, and treatment all within a family atmosphere.

With a grant made possible by the Community Foundation of North Central Florida, AMIkids of Gainesville was able to travel to the 2014 Summer Challenge Event at South Carolina State University. This event combined 18 teams from three states to experience hands-on events in education, athletics, and creativity. Activities included a science fair, spelling bee, track and swimming meets, and an awards ceremony.

Ending out this amazing weekend, an AMIkids participant delivered an impactful speech that noted how ‘second chances’ have had a powerful impact on his life. In the future, he would like to give his parents, who had abandoned him at age 12, the same second chance he received. Gainesville AMIkids team returned with an award for ‘non-residential team excellence,’ having participated in a life changing week at the 2014 Summer Challenge Event.
The Women’s Giving Circle has had continued success in their mission of enriching the lives of women and girls across the Gainesville area through their support of local programming. In 2014, Circle members came together and awarded an impressive $61,300 to the Gainesville community. This brings the Women’s Giving Circle total funds awarded to an astonishing $649,547 since their 2007 inception.
2014 Woman's Giving Circle Recipients

The 2014 Impact Grant for $50,000 was awarded to the Education Foundation's Take Stock in Children Program. Get on the Bus is a community initiative from The Education Foundation of Alachua County that invites the community to make a direct impact on students. The Education Foundation's mission is to invest in the future of all 27,000 Alachua County public school students.

Take Stock in Children was able to purchase 12 Florida Prepaid Scholarships for female students who attended Alachua County public middle schools. Students were selected and matched with their own mentor.

Girls on the Run received $1,300 in their efforts to partner with Girls Place Inc. Girls on the Run educates and empowers girls at an early age in order to prevent the display of at-risk behavior in the future.

"We could not have had such a success with Girls Place without the grant funding provided by the Women's Giving Circle. Girls Place is a highly subsidized program and the families that utilize this venue need assistance in providing quality programming to their children. We are very excited that the program was a success and look forward to offering Girls on the Run every fall."

The Arc of Alachua county was awarded $8,700 to employ nine women through their Gone4Ever Program. They have surpassed these expectations by employing 10 women at minimum wage. Gone4Ever Recycling is a division of The Arc of Alachua, a 501(c)3 nonprofit organization dedicated to supporting those with developmental disabilities and raising community awareness about developmental disorders. Together, Gone4Ever Recycling and The Arc of Alachua County are proud to employ more than 100 employees with some form of disability and they continue to look for ways to benefit the developmentally disabled in the Gainesville community.

The University of Florida's Samuel P. Harn Museum of Art received $1,300 for its efforts to partner with Pace Center for Girls. The Harn's Museum of Art collaborates with university and community partners to inspire, educate and enrich people's lives through art. The museum brings the joy of experiencing great works of art to diverse university, community, national and global audiences through relevant and enlightening art collections, exhibitions.
New Funds of 2014

Christina N. Mellen Memorial Fund
Dance Alive! Forever Fund
Einstein School Fund
Gainesville Civic Chorus Endowment
Gainesville High School Class of ‘64 Fund
Halbert C. and Ruth A. Smith Fund
Jungle Friends Primate Sanctuary Fund
Perry and Yadira McDonald Charitable Fund
The Avnee Rawal Fund
Vada Foundation
Walter James Miller Memorial Award for Student Scholarship in the International Fantastic
Agency Funds

Dance Alive Forever Fund

The Dance Alive Forever Fund was established in the honor of two visionary women, sisters Kim Tuttle and Judy Skinner, who have been at the helm of this outstanding organization as artistic and administrative staff for 40 years. The diverse company is filled with esteemed national and international artists, many of whom have received awards and won competitions.

Yet, the company remains small enough to fit most stages and budgets. Consequently, the company has toured 17 states and Costa Rica, and has been on the State Touring Program of Florida since 1976.

The Dance Alive Forever Fund was established in November of 2014 at the Community Foundation with the goal to enrich humanity by sustaining a professional ballet company of the highest caliber which strives for excellence in the fields of artistic creativity, performance, education and community leadership.

Jungle Friends Primate Sanctuary

Jungle Friends Primate Sanctuary established an agency fund in December of 2014 at the Community Foundation with the goal of maximizing the intake and protection of research monkeys.

The Jungle Friends Primate Sanctuary provides permanent sanctuary to monkeys retired from research. In addition to delivering high-quality care, Jungle Friends advocates on behalf of all captive, non-human primates. Over the years, Jungle Friends has been asked to take hundreds of monkeys from research laboratories.

As a member of the North American Primate Sanctuary Alliance, Jungle Friends Primate Sanctuary works cooperatively with a national network of other credible animal sanctuaries, government agencies, other primate and animal protection organizations, and qualified individuals to find placement for unwanted monkeys and to combat the exploitation and mistreatment of captive primates. Currently, Jungle Friends provides housing for more than 75 monkeys who have retired from research facilities around the United States, and more than 160 primates total.

“We chose the Community Foundation of North Central Florida as the organization which would provide expert financial management of our funds at a reasonable cost.”

Beverly Keene, Jungle Friend’s Primate Sanctuary Grants Committee
Funds

Donor Advised Funds

- Boone Family Fund
- Bosshardt Charitable Fund
- Cade Family Fund
- Charles R. and Nancy Perry Endowment Fund
- Christina N. Mellen Memorial Fund
- Cure Dale’s Duchennes
- Dwight’s Fight Against ALS
- Halbert C and Ruth A. Smith Fund
- Jill Darr Rowell Foundation Fund
- John and Peggy Kirkpatrick Fund
- Kincaid Loop Neighborhood Fund
- Marston Charitable Fund
- Mike and Jane Ryals Family Fund
- Noel Mills McGriff and Perry C. McGriff, Jr. Gainesville High School Athletic Department Developmental Fund
- Peaceful Paths Advancement Fund
- Perry and Yadria McDonald Charitable Fund
- Robinson L. and Carolyn G. Henderson Charitable Fund
- Terry Rawson Fund
- The Anne Laird Spain Fund
- The Gladys G. Cofrin Fund
- The Lampost Fund
- The Vision Fund
- Thomas H. Maren Fund
- Vada Foundation

Field of Interest Funds

- Early Learning Coalition
- Women’s Giving Circle
- Youth Development Enhancement Fund
- Gainesville High School Class of ‘64 Fund

Scholarship Funds

- Children of Queen of Peace Scholarship Fund
- Clint Lackinak Scholarship Fund
- Philip Paul Clark Scholarship Fund
- Shands at UF Thomas H Maren Nursing Scholarship Fund
- The Michael P. Murphy Endowment for Mathematics at P.K. Yonge
- Walter James Miller Memorial Award for Student Scholarship in the International Fantastic

Agency & Designated Funds

- Alachua Conservation Trust Florida Communities Trust Properties Endowment Fund
- Alachua County Public Schools Foundation Fund
- Boys & Girls Club of Alachua County Fund
- Buchholz Academy Foundation Endowment Fund
- Dance Alive Forever Fund
- Einstein School Fund
- Friends of Tacachale Fund
- Friends of the Elementary Arts, Inc.
- Gainesville Civic Chorus Fund
- Gainesville Fine Arts Association Fund
- Girls on the Run of Alachua County
- Girls Place, Inc. “Raise the Roof”
- Guardian Foundation, 8th Judicial Court Fund
- Jungle Friends Primate Sanctuary Fund
- Matheson Museum
- Meridian Growth Fund
- North Florida/ Southern Georgia Fisher House Fund
Grants

ACORN Clinic
Alachua Conservation Trust
American Cancer Society
American Heart Association
American Hometown Veterans Association
AMI Kids
Big Brothers Big Sisters
Boy Scouts of America, North Florida Council
Bread of the Mighty Food Bank, Inc
Cade Museum Foundation
Children's Home Society of Florida, Mid-Florida Division
Children's Miracle Network
Concordia College Alabama
Dance Alive! National Ballet
Family Promise of Gainesville
Florida Defenders of the Environment
Friends of the Crisis Center
Gainesville Area Rowing
Gainesville Chess Club
Gainesville Fisher House Foundation, Inc.
Girls on the Run International
Guardian Ad Litem Foundation
Haile's Angels Pet Rescue
Helping Hands Clinic
Holy Trinity Episcopal Church
Kiwanis Club of Gainesville Foundation, Inc.
Leukemia and Lymphoma Society
Matheson Museum
Oak Hall School
Operation Catnip
Partners in Adolescent Lifestyle Support Program
PACE Center for Girls of Alachua
Peaceful Paths

Queen of Peace Catholic Church, Haiti Medical Mission
Reichert House
Rotary Clubs of Gainesville Foundation, Inc.
Rwanda Sustainable Families
Santa Fe College
School Board of Alachua County
Sea Turtle Conservancy
Sebastian Ferrero Foundation, Inc.
Shands Arts in Medicine Program
Southeastern Healthcare Foundation
Southern Legal Counsel
Southwest Advocacy Group
St. Francis House
St. Mary's Health Wagon
St. Patrick Interparish School
Stop! Children's Cancer, Inc.
The Arc of Alachua County, Inc.
The Education Foundation of Alachua County, Inc.
The Florida Museum of Natural History
The Harn Museum of Art
Tonewood Family Music
Tyler's Hope for a Dystonia Cure
United Way of North Central Florida
University of Florida Hillel
WUFT
2014 Legacy Awards

These awards were established to acknowledge the important collaboration between donor, professional advisor, corporation, and charity in creating an effective and meaningful charitable gift.

Donor Recognition Award

2014 Honoree: Dr. & Mrs. David A. Cofrin

The Donor Recognition Award is awarded to an individual, couple or family who has made a significant impact through their planned gift to a charity. This Legacy Award for Donors recognizes and honors an individual or family for their commitment to support of charitable causes. Special consideration is given to donors who have provided leadership and or encouragement to others, and to donors who have structured unique and innovative planned gifts that enrich the lives of people in our community.

Nonprofit Recognition Award

2014 Honoree: LifeSouth Community Blood Centers

The Nonprofit Recognition Award recognizes a leading nonprofit who has demonstrated a commitment to encouraging gift planning, including bequests and other planned gifts, through exceptional program and marketing efforts.
Professional Advisor Award

2014 Honoree: Richard White

The Professional Advisor Award recognizes service, expertise, and outstanding work by a Professional Advisor in helping his or her client complete a transformative charitable gift. This category applies to Trust/Estate Attorneys, Financial/Investment Advisors, CPAs, Bankers/Trust Officers and other trained or certified practicing professionals.

Corporate Recognition Award

2014 Honoree: Southeast Car Agency

The Corporate Recognition Award recognizes a company that exemplifies giving back to their community through volunteerism and charitable giving.

Previous Award Winners

Donor Recognition Award
Dr. and Mrs. Robert Cade (2013)
Mrs. Nancy Perry and the late Chuck Perry (2012)
Davis and Judi Rembert (2011)

Professional Advisor Award
Vicki Santello (2013)
Jack Bovay (2012)
Joe Richardson, CPA (2011)

Nonprofit Recognition Award
Meridian Behavioral Healthcare (2013)
Girl Scouts of Gateway Council (2012)
Haven Hospice (2011)

Corporate Partners

[Logos of Community Bank & Trust of Florida, M&S Bank, CPPI, and Florida Blue Farms]
The Baby Boomer generation holds a massive pool of Floridians’ wealth, and as this generation ages, much of the wealth will be transferred from one generation to the next. In fact, over the course of the next 10 years, approximately $322 million is estimated to change hands within the state of Florida.

Planned giving is a method of supporting nonprofits and charities that enables philanthropic individuals or donors to make larger gifts than they could make from their income. By definition, a planned gift is any major gift, made as part of a donor’s overall financial and/or estate planning.

By understanding the mechanics of the coming Transfer of Wealth and Planned Giving, agencies can utilize this data to expand philanthropic giving in Alachua and create a bright future for the community.
Council Members:
Ashley Banks, CFP, CDFA
Sam Boone Jr., P.A.
Marilyn Cangro Belo, J.D.
Lisa Chacon, CFP
Richard Cheshire, Jr. CLU, AEP
Christopher Conner, CFP
Lee E. Banks
Peter C. Enwall, J.D.
Ellen Gershow, J.D. LLM
Laura Gillman, Managing Partner
M. David Gracy, Jr. CFP CLU
Jeff Hogue, CFP CSNA
Sam Holloway, Jr.
Emily Humphreys- Beher
Joseph Lowry, Jr., Managing Partner
Susan M. Ossi, J.D.
Howard M. Rosenblatt, J.D.
William Ryals, J.D. LLM
Erin Spiwak, CPA
Darrel Timberlake

Laura Gillman, CPA
Laura Gillman, a long-time resident of Gainesville, received both her B.S. and M.S. in Accounting from the University of Florida. She has 25 years of experience in taxation and has been the Managing Shareholder of Austin, Bovay & Gillman since 2006. She assists clients with current and long-term tax planning, seeking their input on how the firm can better serve their needs to help transition wealth across generations.

“The Women's Giving Circle taught me the power of collective giving. Ten years ago women pooled their individual donations in favor of making a larger impact. Our collective giving resulted in $649,548 across 24 agencies which is a powerful force in our community”

Sam Boone, Jr.
Sam W. Boone, Jr. is an elder law and estate planning attorney. He has been practicing law for more than 35 years. Sam’s focus is on how the law can impact people over 50, as well as those with disabilities and their families. In addition to elder law and estate planning, Sam’s practice areas include special-needs planning, probate/estate administration, asset protection and guardianship. As a past president of the Academy of Florida Elder Law Attorneys, he works with elected officials, mentors other attorneys working in the same practice areas and supports local organizations that provide support and services to those who would use his type of services.

“The Community Foundation of North Central Florida is a vital resource for our community and a perfect tool for my clients and others searching for an opportunity to provide a planned gift locally. The Foundation’s mission of promoting and sustaining philanthropy is a shining example of altruism – of giving to those in our area who would benefit the most.”
## Financials

### Statements of Financial Position

**December 31 – 2013 & 2014**

<table>
<thead>
<tr>
<th>Assets</th>
<th>2014</th>
<th>2013</th>
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</thead>
<tbody>
<tr>
<td>Cash and Equivalents:</td>
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<tr>
<td>Checking</td>
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<td>Money Market</td>
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<td>$ 196,088</td>
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<td>Total Cash and Equivalents</td>
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<td>SunTrust Investment Account</td>
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<td>UBS/ML Investment Account</td>
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<td>Fidelity Investment Account</td>
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<td>Total Investments</td>
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<td>Pledge Receivable</td>
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<td>Prepaid Expense</td>
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<td>Fixed Assets, Net</td>
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<td>$ 647,690</td>
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<td>Mortgage Receivable, Net</td>
<td>$ 529,952</td>
<td>$ 533,684</td>
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<td>Interest in Gatorade Trust</td>
<td>$ 4,180,000</td>
<td>$ 3,999,000</td>
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<td>Land – Patient's Park</td>
<td>$ 90,000</td>
<td>$ 90,000</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$ 14,002,369</strong></td>
<td><strong>$ 13,373,853</strong></td>
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<table>
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<tr>
<th>Liabilities and Net Assets</th>
<th>2014</th>
<th>2013</th>
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<tr>
<td>Liabilities:</td>
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<td>Accounts Payable</td>
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<td>Mortgage Note Payable</td>
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<td><strong>Total Liabilities</strong></td>
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<td>Net Assets:</td>
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<td><strong>Total Net Assets</strong></td>
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<td><strong>$ 10,602,550</strong></td>
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<tr>
<td>Total Liabilities and Net Assets</td>
<td><strong>$ 14,002,369</strong></td>
<td><strong>$ 13,373,853</strong></td>
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</tbody>
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Board of Directors

2014 Board of Directors

Eric Godet
Chairman

Mitch Glaeser
Vice Chairman

Tony Kendzior
Secretary

WJ Rossi
Treasurer

Perry McGriff
Past Chairman

Row 1 (L-R): Mark Avera, Jack Bovay, Phil Emmer, Stan Given, Dink Henderson, Clark Hodge, Cathy Jenkins

Row 2 (L-R): Linda Kallman, Maggie Labarta, Ph.D., Carrie Lee, Peter Maren, Wes Marston, Howard Patrick, Susannah Peddie

Row 3 (L-R): Michael Potapow, Mike Ryals, Melanie Shore, Ester Tibbs, Marilyn Tubb, Terry Van Nortwick, Matthew Webster

Row 4 (L-R): Richard White, Carole Zegel