



community  
FOUNDATION OF NORTHWEST  
FLORIDA

# THE ANNUAL REPORT

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CONNECTING PEOPLE WHO GIVE  
WITH NEEDS THAT MATTER

## A MESSAGE FROM THE CHAIRMAN

It is the goal of the Community Foundation of Northwest Florida to become Northwest Florida's premiere provider of philanthropic services. We focus our efforts from Escambia to Bay counties. With the continued support of the communities we serve and the leadership of our Board of Directors, we look forward to serving the greater panhandle area and its citizens.

Our board invites you to join in our mission of: "Connecting People Who Give with Needs That Matter!"

### *Helping Donors Give to Their Favorite Charities*

Donors may establish a charitable fund with us (\$5,000 minimum) that operates much like a private foundation but without the expense, administrative burdens and restrictions. A charitable fund may be created during life or at death. Once you establish a fund, the Community Foundation becomes the back office administrator of your foundation (we call it a charitable fund) handling all of the administrative details, IRS compliance, accounting, audit, investment, grant research, etc. And, you get to do the fun and rewarding part: recommend grants from your fund to your favorite charities.

**JUSTIN TATE**  
VICE PRESIDENT, BBVA

## THREE PRIMARY REASONS FOR YOU TO CREATE A CHARITABLE FUND AT THE FOUNDATION

### *To Be More Organized*

- Receive one tax receipt for all of your charitable gifts
- Receive regular reports showing the charities you support
- Receive a buffer from solicitations

### *To Create a Legacy of Giving*

- Continue your giving beyond your lifetime
- Include your children and grandchildren, if you wish, to share your philanthropy values and a tradition of giving
- It is easier and more cost effective than a private foundation

### *To Achieve Maximum Tax Advantages*

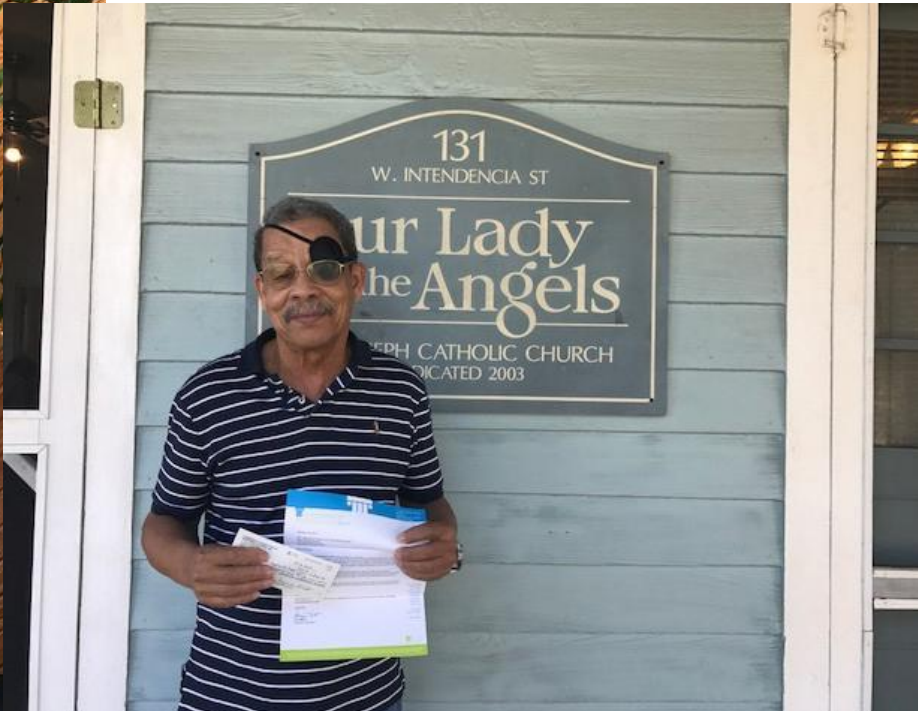
- Escape capital gains tax by funding your charitable gifts with appreciated assets
- Shelter income by giving larger amounts in good income years and giving grants to charities over time
- Give more away by investing your charitable dollars
- Reduce your current income tax obligation and remove assets from your taxable estate by establishing a fund at the Foundation



*With your support, we are focusing on developing our goals by:*

- Better educating the communities we serve
- Growing our Foundation's assets through Donor Advised Funds and Agency Endowments
- Expanding the geographic reach of the Foundation





**CONNECTING PEOPLE WHO GIVE WITH NEEDS THAT MATTER**

**BOARD OF  
TRUSTEES****JUSTIN TATE**

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Chairman  
Vice-President, BBVA

**KATIE WHITE**

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Vice-Chairman  
Attorney, McDonald,  
Fleming & Moorhead

**JAY BRADSHAW**

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Secretary  
President, Coastal  
Moving & Storage

**TIM STRONKO**

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Treasurer  
District Customer Service  
Manager, Gulf Power  
Company

**RICK JOHNSON**

---

Trustmark Bank

**KRAMER LITVAK**

---

Attorney, Litvak, Beasley  
& Wilson

**TAMMY MCGAUGHY**

---

CPA, Warren Averett

**CECILIA NANNI**

---

Vice President, Regions

**GREGG NOBLE**

---

CPA, Saltmarsh,  
Cleveland and Gund

**SUZIE WEST**

---

Executive Director

**PAUL YOUNG**

---

Retired



**INVESTMENT COMMITTEE**

Justin Tate  
Mort O’Sullivan  
Eric Nickelsen  
Gregg Noble

**PREVIOUS BOARD MEMBERS**

Scott Barrow	Ed Gray	Mort O’Sullivan	Allison Sinrod
Sheilah Bowman	Jeff Helms	Tom Owens	Antonio Terry
Nina Campbell	Betsy Moore	Henry Roberts	Mike Wiggins
John S. Carr	Neal Nash	Grover Robinson, III	Harrison Wilder
Joe Denmon	Eric Nickelsen	Susan Shaw	

**COMMUNITY FOUNDATION  
OF NORTHWEST FLORIDA****MISSION**

**TO ENRICH THE LIVES AND STRENGTHEN  
THE COMMUNITIES WE SERVE.**

**VISION**

**TO BE NORTHWEST FLORIDA'S PREMIERE  
PROVIDER OF PHILANTHROPIC SERVICES.**

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The Community Foundation of Northwest Florida is one of more than 700 community foundations across America, helping individuals, families and organizations make permanent charitable investments in their communities. We are proud to be able to serve the people of Northwest Florida who have philanthropic interests. We are happy to serve as a grant maker for area non-profits as well.

## GOALS

To create increased visibility and understanding of the Community Foundation of Northwest Florida.

To improve the lives of individuals and families by connecting donors with community needs.

To identify and respond to emerging community needs.

To manage the resources of the CFNWF to better meet the region's present and future needs.



### **You don't have to be wealthy...**

Community Foundations exist to give more people the same options enjoyed by the very rich – the ability to set aside a sum of money that will yield income in perpetuity for charitable purposes. The Community Foundation manages the charitable funds, distributes gifts on behalf of donors, provides the accounting functions and satisfies all government reporting requirements. This arrangement leaves the donor freedom to focus only on their charitable interests.

The Community Foundation is home to charitable funds established by individuals, families and organizations. The first step is to select the fund that best meets your charitable interest. The Community Foundation can work with you or your financial advisor to customize a fund to achieve your goals.

## TYPES OF FUNDS

### 1. Unrestricted Funds

The Community Foundation welcomes unrestricted gifts of any amount. Through the combined unrestricted gifts made by many donors from the community, the Foundation is provided the flexibility to address current and future community needs.

### 2. Donor Advised Fund

A donor may create a fund with a single gift to the Community Foundation and then recommend gifts to various charities over time. This type fund functions much like a private family foundation with less expenses, more privacy and the donor has no government reporting requirements.

### 3. Donor Designated Fund

A donor may create a fund designed to provide long-term support to a single charity or multiple charities of their choice.

### 4. Field of Interest Fund

A donor may create a fund designed to provide long-term support for a particular area of interest such as children, the environment, the arts, etc. The original donor or anyone with a similar interest may add to the fund with future gifts.

### 5. Agency Endowment Fund

A public charity or religious institution may create an endowment fund designed to provide income for future charitable purposes. Donors may add to the fund with future gifts.



# 2017 COMMUNITY FOUNDATION GRANTS LIST



**2017  
GRANTS LIST**

	AMOUNT	CAUSE	FUND
Pensacola Children's Chorus	\$1,402.57	CHILDREN	Blanton Fund
American Cancer Society	\$7,403.85	HEALTH & HUMAN SERVICES	Weiland Fund
American Red Cross of NW Florida	\$7,403.85	HEALTH & HUMAN SERVICES	Weiland Fund
American Heart Association	\$7,403.85	HEALTH & HUMAN SERVICES	Weiland Fund
Father Flanagan's Boys Home	\$7,403.85	CHILDREN	Weiland Fund
Snoezelen Westgate Foundation	\$6,965.27	CHILDREN	Waters Fund
90Works	\$6,965.27	FAMILIES	Waters Fund
Children in Crisis	\$1,741.31	CHILDREN	Waters Fund
Food for Thought	\$1,741.31	CHILDREN	Waters Fund
Boy Scouts of America, GCC	\$1,741.31	CHILDREN	Waters Fund
Early Learning Coalition, Okaloosa/Walton	\$1,741.31	CHILDREN	Waters Fund
Learn to Read	\$279.72	LITERACY	Bogardus Fund
Christ the King Episcopal Church	\$5,000.00	HEALTH & HUMAN SERVICES	Phillip, Annie & Parker Stutts Charitable Fund
Tree House Episcopal Montessori School	\$2,200.00	EDUCATION	Phillip, Annie & Parker Stutts Charitable Fund
Catholic University of America	\$1,000.00	EDUCATION	Phillip, Annie & Parker Stutts Charitable Fund
St. Rita Catholic Church - Pre-School	\$500.00	EDUCATION	Phillip, Annie & Parker Stutts Charitable Fund
Children's Volunteer Health Network	\$1,500.00	CHILDREN	Phillip, Annie & Parker Stutts Charitable Fund
XPRIZE	\$5,000.00	EDUCATION	Phillip, Annie & Parker Stutts Charitable Fund
Maharishi Foundation USA, Inc.	\$2,000.00	HEALTH & HUMAN SERVICES	Phillip, Annie & Parker Stutts Charitable Fund
Greater Houston Community Foundation	\$500.00	HEALTH & HUMAN SERVICES	Phillip, Annie & Parker Stutts Charitable Fund
University of Alabama Alumni Association	\$250.00	EDUCATION	Phillip, Annie & Parker Stutts Charitable Fund
Children's Volunteer Health Network	\$1,500.00	CHILDREN	Go BIG Media Charitable Fund
Hands Along The Nile	\$178.57	BASIC SOCIAL SERVICES	Go BIG Media Charitable Fund
St. Jude Research Hospital	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund

## 2017 GRANTS LIST

	AMOUNT	CAUSE	FUND
Headstrong Project	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund
St. Jude Research Hospital	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund
Treatment Advocacy Center	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund
St. Jude Research Hospital	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund
Childrens Miracle Network	\$178.57	CHILDREN	Go BIG Media Charitable Fund
The Hun Fund - The Hun School of Princeton	\$178.57	EDUCATION	Go BIG Media Charitable Fund
Capitol Hill Pregnancy Center	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund
The Arc of the Capital Area	\$178.57	BASIC SOCIAL SERVICES	Go BIG Media Charitable Fund
Snowball Express	\$178.57	HEALTH & HUMAN SERVICES	Go BIG Media Charitable Fund
Friends of Renton Schools Fund	\$178.57	EDUCATION	Go BIG Media Charitable Fund
POPPS (dba Powell Padres)	\$178.57	EDUCATION	Go BIG Media Charitable Fund
The Cornwall Alliance for the Stewardship of Creation	\$178.57	BASIC SOCIAL SERVICES	Go BIG Media Charitable Fund
Impact 100	\$1,000.00	BASIC SOCIAL SERVICES	Eugene B. Rosenbaum Charitable Fund
Pensacola Jewish Federation	\$7,000.00	BASIC SOCIAL SERVICES	Eugene B. Rosenbaum Charitable Fund
Impact 100	\$1,000.00	BASIC SOCIAL SERVICES	Henry & Jane Roberts Charitable Fund
Milk and Honey	\$1,000.00	CHILDREN	Henry & Jane Roberts Charitable Fund
Milk and Honey	\$250.00	CHILDREN	Henry & Jane Roberts Charitable Fund
First United Methodist United Community Ministries	\$500.00	BASIC SOCIAL SERVICES	Henry & Jane Roberts Charitable Fund
Milk and Honey	\$850.00	CHILDREN	Henry & Jane Roberts Charitable Fund
Milk and Honey	\$1,000.00	CHILDREN	Henry & Jane Roberts Charitable Fund
First United Methodist United Community Ministries	\$500.00	BASIC SOCIAL SERVICES	Henry & Jane Roberts Charitable Fund




	AMOUNT	CAUSE	FUND
YMCA of NWFL	\$1,000.00	HEALTH & HUMAN SERVICES	Henry & Jane Roberts Charitable Fund
ARC Gateway	\$100.00	BASIC SOCIAL SERVICES	Young Family Charitable Fund
Trinity Presbyterian Church	\$1,500.00	BASIC SOCIAL SERVICES	Young Family Charitable Fund
ARC Gateway	\$1,000.00	BASIC SOCIAL SERVICES	Young Family Charitable Fund
St. Elizabeth School	\$1,000.00	EDUCATION	Young Family Charitable Fund
The Satori Foundation	\$35,000.00	EDUCATION	The Patterson Family Charitable Foundation
University of Alabama - Book Arts Program	\$20,000.00	ARTS & LITERACY	The Patterson Family Charitable Foundation
University of Alabama - Sport Business Management	\$5,000.00	EDUCATION	The Patterson Family Charitable Foundation
University of Alabama - Undergraduate Scholarship Program	\$10,000.00	EDUCATION	The Patterson Family Charitable Foundation
Habitat for Humanity of Tuscaloosa	\$2,500.00	BASIC SOCIAL SERVICES	The Patterson Family Charitable Foundation
YMCA of NWFL	\$2,500.00	HEALTH & HUMAN SERVICES	The Patterson Family Charitable Foundation
Our Lady of the Angels, St. Joseph Medical Clinic	\$2,500.00	HEALTH & HUMAN SERVICES	The Patterson Family Charitable Foundation
Big Oak Ranch	\$24,000.00	CHILDREN	The Patterson Family Charitable Foundation
Gulf Coast Council, Boy Scouts of America	\$2,500.00	CHILDREN	The Patterson Family Charitable Foundation
Boys and Girls Club of the Emerald Coast	\$2,500.00	CHILDREN	The Patterson Family Charitable Foundation
United Way of West Alabama	\$7,500.00	BASIC SOCIAL SERVICES	The Patterson Family Charitable Foundation
Milk and Honey Outreach	\$1,250.00	CHILDREN	Rebecca Roberts Charitable Fund
Sacred Heart Foundation	\$1,000.00	HEALTH & HUMAN SERVICES	Rebecca Roberts Charitable Fund
United Methodist Children's Home	\$2,000.00	BASIC SOCIAL SERVICES	Rebecca Roberts Charitable Fund
First United Methodist Church	\$1,000.00	HEALTH & HUMAN SERVICES	Rebecca Roberts Charitable Fund
Pensacola High School	\$1,000.00	EDUCATION	Andrew Thacker Dill Memorial Fund DAF

**Total Grants****\$212,093.45**



community  
FOUNDATION OF NORTHWEST  
FLORIDA



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 [www.cfnwf.org](http://www.cfnwf.org)