



COMMUNITY FOUNDATION
of Central Florida



Community Foundation of Central Florida, Inc.

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General Information

Nonprofit

Community Foundation of Central Florida, Inc.

Address

1411 Edgewater Drive
Suite 203
Orlando, FL 32804
Orange County

Phone

(407) 872-3050

Fax

(407) 425-2990

Website

www.cfcflorida.org

Contact Email

info@cfcflorida.org

Year of Incorporation

1993

Organization DBA

Former Names

Organization's type of tax exempt status

Public Supported Charity

Name of supporting organization

Organization received a competitive grant from the community foundation in the past five years

No

Statements and Search Criteria

Mission Statement

Building Community by Building Philanthropy

Impact Statement

During our fiscal year ended April 30, 2010, thanks to the generosity of individuals, families and corporations, the Community Foundation of Central Florida created 18 new charitable funds. We granted more than \$2.2 million to 237 organizations.

Independent research has been conducted on this organization's theory of change or on the effectiveness of this organization's program(s)

Background Statement

In 1994, a handful of charitable investors contributed \$1 million to establish the Community Foundation as a home for Central Florida philanthropists. Today, thanks to the generosity of hundreds of individuals, families and corporations who trust us as a partner in their philanthropy, the Community Foundation has grown to hold nearly 400 charitable funds with assets of more than \$41 million, and has made cumulative grants of more than \$21 million.

Primary Organization Category

Philanthropy, Voluntarism & Grantmaking Foundations / Community Foundations

Secondary Organization Category

Community Improvement, Capacity Building / Nonprofit Management

Tertiary Organization Category

Geographic Areas Served

FL - Brevard

FL - Lake

FL - Orange

FL - Osceola

FL - Polk

FL - Seminole

FL - Volusia

Needs Statement

The Community Foundation is a home for philanthropists and other charitable investors who want the flexibility to be engaged with their charitable giving. The Community Foundation helps the community by providing a foundation for individuals, families, or companies that want to establish a charitable fund to organize and streamline their giving.

If you have an interest in healthcare, education, social services, arts and culture, or the faith-based community, you can make a gift to a fund at the Community Foundation to support your interest. The Community Foundation is home to many community funds that support specific communities and areas of interest.

CEO Statement

Board Chair Statement

Programs

Encourage Philanthropy in Central Florida

- **The African American Focus Fund** is a philanthropic initiative of the Community Foundation of Central Florida that exists to engage African Americans in philanthropy and enhance the lives of African Americans in Central Florida. This initiative will enable the Central Florida African American community to pool resources for greater impact in addressing issues of common concern through grantmaking.
- **Nuestro Futuro** is a philanthropic initiative of the Community Foundation of Central Florida that exists to engage Hispanics in philanthropy and enhance the lives of Hispanics in Central Florida. This initiative will enable the Central Florida Hispanic community to pool resources for greater impact in addressing issues of common concern through grantmaking.
- **Parramore Kidz Zone Project** is a collaboration between national and local funding partners to help change a distressed Orlando neighborhood into a healthy place for children. Our success will be readily measurable: lower teen pregnancy rates, improved school performance, and decreased juvenile crime and child abuse rates.

Budget

\$295,000

Category

Philanthropy, Voluntarism & Grantmaking, General/Other / Philanthropy, Voluntarism & Grantmaking, General/Other

Population Served

General/Unspecified

Program Short-Term Success

Our short term success is dependant on our ability to engage philanthropists and is measured by an increase in the amount of philanthropy in Central Florida.

Program Long-Term Success

An increase in the amount of philanthropy will provide a sustainable source of funding for Central Florida nonprofit organizations.

Program Success Monitored By

Community Foundation of Central Florida Board of Directors.

Examples of Program success

As a teenager, Ambassador Robert Hutchings took classes from his Aunt Sarah Elizabeth "Betty" Foard Hutchings, a longtime teacher at DeLand High School, known to most by her maiden name as "Miss Foard." The much-admired teacher taught mathematics for 40 years inspiring three generations of DHS students. So when Betty died at age 93 leaving Hutchings an inheritance, he could think of no better honor than to establish a scholarship in her name. "I wanted to do something for the community that would carry on my aunt's maiden name," says Hutchings. He contacted the Community Foundation of Central Florida and worked with the staff to set up an endowed scholarship fund for DeLand High School students.

"The Foard Award is meant to inspire future generations with the ideals that guided my aunt's long and joyful life of service to others," says Hutchings, whose family roots are inextricably tied to DeLand High School. His parents both graduated from DeLand High School as well as their siblings and several other family members. Hutchings wants the scholarship to endure and is entrusting the Community Foundation of Central Florida with the fund's investment and management. "They make it possible for people who don't have millions of dollars to give more effectively. Their money is invested wisely and managed so that it can be used for its intended purposes," says Hutchings. Wanting to foster the scholarship's local connections, Hutchings decided against setting up the award at a bank in New Jersey where he lives. "The Community Foundation locks the award into the community itself," says Hutchings.

Through his charitable actions, Hutchings hopes to inspire people of all means to make a difference. "The government and private sector can't do everything. There is still a need for philanthropy on a large and small scale. Even a small gift can be part of making a big difference in whatever the donor cares most about, from

arts to academics to environmental causes,” says Hutchings.

Grantmaking and Other Services to Nonprofit Organizations

Grantmaking to Nonprofit Organizations

- **Donor Advised Funds** - Donors work with the Community Foundation's professional staff to recommend grants from the fund to nonprofit organizations to accomplish their charitable goals.
- **Portfolio Grantmaking** - An initiative grant round where our advisory boards use our knowledge base to identify organizations to invest in that fit into predefined portfolios.
- **Grants from Affiliates and Initiatives** In addition to managing endowment funds, the Community Foundation of Central Florida is host to several different types of organizations whose purposes serve to create the charitable vehicles donors need to achieve their philanthropic goals.

Other Services

- **A Resource for Social Change** Community Foundations exist to bring charitable people and resources together to address the social, educational, economic, environmental and cultural needs of communities. If your nonprofit organization is working to address issues like these in our community, we encourage you to contact us.
- **Nonprofit Organization Endowment** The Community Foundation understands that nonprofit organizations have a need for stable, predictable sources of income. A nonprofit organization endowment at the Community Foundation can help.
- **Planned Giving Assistance** According to the report GIVING USA 2007, bequests resulted in \$22.91 billion or 7.8 percent of all charitable contributions made in 2006. How much more effectively would your organization operate with a steady stream of revenue from planned gifts and bequests?

Budget

\$3,700,000

Category

Philanthropy, Voluntarism & Grantmaking, General/Other / Philanthropy, Voluntarism & Grantmaking, General/Other

Population Served

General/Unspecified

Program Short-Term Success

In the short term we are focused on increasing grantmaking assets by encouraging philanthropy so that the pool of available capital increases.

Program Long-Term Success

As the pool of available capital increases, an increase in grants made to nonprofit organizations will increase

Program Success Monitored By

Our grantmaking is monitored by the Community Foundation of Central Florida Board of Directors annually.

Examples of Program success

During our 2009 fiscal year, we made 420 grants with the largest grant made for \$500,000.

Knowledge Base

The knowledge base is designed to support transparency by delivering web-based information about the financial, operational and programmatic health of local nonprofit organizations. It is a one-of-a-kind resource that connects people who want to make a difference with local charitable organizations doing important work. The Community Foundation will use the knowledge base to drive results-oriented philanthropy to build the capacity and measurably improve the performance of local nonprofit organizations. To search for nonprofits in the knowledge base go to <http://cfcf.guidestar.org>.

Budget

Category

Philanthropy, Voluntarism & Grantmaking, General/Other / Philanthropy, Voluntarism & Grantmaking, General/Other

Population Served

General/Unspecified

Program Short-Term Success

To have reviewed portraits in our knowledgebase for all of the nonprofit organizations in Central Florida.

Program Long-Term Success

Increased transparency in the nonprofit sector will lead to greater investment potential and higher chance of long term sustainability of nonprofits in Central Florida.

Program Success Monitored By

The knowledgebase is overseen by the Community Foundation of Central Florida Board of Directors.

Examples of Program success

In the first year of operation, the knowledge base has more than 450 nonprofit participants and has provided information for a variety of grantmaking organizations in Central Florida.

Program Comments

CEO Comments

Foundation Staff Comments

Management

CEO/Executive Director

Mr. Mark Brewer

CEO Term Start

Jan 2001

CEO Email

mbrewer@cfclorida.org

CEO Experience

Mark Brewer is President and Chief Executive Officer of the Community Foundation of Central Florida, Inc. The Foundation's mission is to build community by building philanthropy, and it holds more than 400 charitable funds for individuals, families, businesses and nonprofit agencies across the region. He was selected as president and CEO, and joined the Foundation board of directors in 2000. By managing and investing donor funds, connecting donors with projects they feel passionately about, and providing research for donors to make informed decisions, the Community Foundation connects people with what they care about in the Central Florida regional community.

Mr. Brewer has earned respect for his ability to build community partnerships that meet issues head-on and produce measureable results. He has worked with hundreds of individuals, families, and corporations to establish philanthropy plans, endowments, funding strategies, and planned gifts. More than 100 regional nonprofit boards have enlisted Mr. Brewer's assistance with strategic and scenario planning initiatives that include the use of endowed investments to sustain their organizations. He is a well-known national speaker on nonprofit sector management and strategy, philanthropy's role in America, venture philanthropy strategies, and the role of the nonprofit sector in public policy. Mr. Brewer began his career in the media as a reporter, anchor, and journalist. His background includes more than a decade as a management and performance consultant in the nonprofit sector. Later, as a licensed investment professional, he assisted donors with estate and planned giving strategies. Mr. Brewer holds a Bachelor of Science in Business, a Masters Degree in Public Administration with a specialty in Nonprofit Management, and is a candidate for a PhD in Public Policy and Law from Walden University (Expected 2011).

Mr. Brewer plays a leadership role in a number of community initiatives and serves on several community boards including the Central Florida Partnership, Myregion.org, the Central Florida Homeless Commission, the Florida Philanthropic Network, and is Chair of the Advisory Board of the Donors Forum of Central Florida. He has also served in leadership roles with the Association of Fundraising Professionals, the Central Florida Planned Giving Council, and is a past chair of the Florida Federation of Community Foundations. Mr. Brewer frequently advises private and corporate foundation grantmakers across the region.

Number of Full Time Staff

6

Number of Part Time Staff

2

Number of Volunteers

36

Number of Contract Staff

1

Staff Retention Rate

89

Organization has Fundraising Plan?

Yes

Organization has Strategic Plan?

Yes

Does your organization have a Business Continuity Plan?

Years Strategic Plan Considers

5

Date Strategic Plan Adopted

Feb 2008

Management Succession Training Plan

Yes

Organization Policies And Procedures

Yes

Co-CEO

Co-CEO Term Start

Co-CEO Email

Co-CEO Experience

Former CEOs and Terms

Mrs. Diane Sandquist - May 1993 to Dec 2000

Senior Staff

Meghan Warrick, CPA - Vice President of Administration & Chief Financial Officer

Meghan Warrick is the Vice President of Administration & Chief Financial Officer of the Community Foundation of Central Florida. Prior to joining the Foundation, Meghan was an audit manager in KPMG LLP's public services practice and served numerous governmental and not-for-profit clients. Meghan is a member of the Florida Institute of Certified Public Accountants. Meghan holds both a Master of Accountability and a Bachelor of Business Administration degree from Stetson University. Meghan is a former Trustee of the First Congregational Church of Winter Park.

Management Reports to Board?

Yes

CEO Formal Evaluation and Frequency

Yes - Annually

Senior Management Formal Evaluation and Frequency

Yes - Annually

Non Management Formal Evaluation and Frequency

Yes - Annually

Collaborations

Bennett & Company Marketing
ClearChannel Outdoor
GuideStar
Heart of Florida United Way
Philanthropy & Nonprofit Leadership Center at Rollins College
United Arts of Central Florida
University of Central Florida
Walt Disney World

Affiliations

External Assessments Accreditations

Association of Fundraising Professionals - 2001

Council on Foundations National Standards - 1996

Awards

Champions of Sustainability - Healthy Communities Initiative - 2006

Government Licenses

Nondiscrimination Policy Plan

Yes

Whistle Blower Policy Plan

Yes

Document Destruction Policy Plan

Yes

Directors and Officers Insurance Policy

Yes

CEO Comments**Foundation Staff Comments****Governance****Board Chair**

Mr. Stephen P. Elker

Board Chair Company Affiliation

Community Leader

Board Chair Term

May 2011 to Apr 2013

Board Chair Email

steve.elker@gmail.com

Board Members

Dr. Avanish Aggarwal - Internal Medicine Specialist - Voting

Ms. Susan Arkin - Community Leader - Voting

Mr. Waymon Armstrong - Engineering & Computer Simulations - Voting

Ms. Lyn Berelsman - Philanthropist - Voting

Mr. Mark Brewer - Community Foundation of Central Florida - Voting

Mr. Derek E. Bruce - Edge Public Affairs - Voting

Mr. Eugene Campbell - Walt Disney World Company - Voting

Mr. Stephen P. Elker - Community Leader - Voting

Mr. Aaron Gorovitz - Lowndes, Drosdick, Doster, Kantor, P.A. - Voting

Mr. Rob Panepinto - Connexions, Inc - Voting

Ms. Stacey Prince-Troutman - Broad and Cassel - Voting

Ms. Alexis C. Pugh - Philanthropist - Voting

Ms. Kaki Rawls - CNL Financial Group, Inc. - Voting

Dr. Robin Roberts - Philanthropist - Voting

Mr. Marty Rubin - Smart City Networks - Voting

Ms. Paula Shives - Community Leader - Voting

Mr. Robert F. Thomson, II - Commerce National Bank and Trust - Voting

Board Demographics

Ethnicity:

African American/Black: 3

Asian American/Pacific Islander: 0

Caucasian: 13

Hispanic/Latino: 0

Native American/American Indian: 0

Other: 1

Other (if specified): Indian

Gender:

Female: 7

Male: 10

Unspecified: 0

Board Term Lengths

3

Board Term Limits

2

Board Meeting Attendance Percentage

84

Written Board Selection Criteria

Yes

Written Conflict Of Interest Policy

Yes

Percentage of Monetary Contributions

100

Percentage of In-Kind Contributions

0

Constituency Includes Client Representation

No

Board Co-Chair

Board Co-Chair Company Affiliation

Board Co-Chair Term

to

Board Co-Chair Email

Number of Full Board Meetings Annually

6

Constituent Board Members

Risk Management Provisions

Risk Management Provisions
Directors and Officers Policy
Employee Dishonesty
Employment Practices Liability
General Property Coverage
Workers Compensation and Employers' Liability

Standing Committees

Executive
Investment
Audit
Board Development / Board Orientation

Additional Board/s Members and Affiliations

Ms. Susan Arkin - Community Investment Advisory Board

Dr. Richard Bogue - Community Investment Advisory Board

Ms. Yvonne Lopez-Diaz - Community Investment Advisory Board

Ms. Rita Lowndes - Philanthropist - Voting

Mr. Kenneth Murrah - Winter Park Community Foundation Advisory Board

Ms. Alexis Pugh - Community Investment Committee

Dr. Robin R. Roberts - Community Investment Committee

Mr. Thad Seymour - Rollins College - Voting

Ms. Elizabeth Villegas - Winter Park Community Foundation Advisory Board

CEO/Executive Director Comments

Financials

Fiscal Year

2012

Projected Revenue

\$1,127,410

Projected Expenses

\$1,127,410

Prior Three Years Total Revenue and Expense Totals Chart

Fiscal Year	2011	2010	2009
Total Revenue	\$4,938,375	\$6,867,417	\$3,765,500
Total Expenses	\$4,449,149	\$3,978,153	\$5,189,424

Prior Three Years Total Revenue Sources Chart

Fiscal Year	2011	2010	2009
Foundation and Corporation Contributions	\$519,489	\$1,206,410	\$1,224,256
Government Contributions	\$575,000	\$0	\$0
-- Federal	\$0	\$0	\$0
-- State	\$0	\$0	\$0
-- Local	\$575,000	\$0	\$0
-- Unspecified	\$0	\$0	\$0
Individual Contributions	\$1,104,173	\$4,605,835	\$1,926,717
Indirect Public Support	\$0	\$0	\$10,000
Earned Revenue	\$803,811	\$690,848	\$703,502
Investment Income, Net of Losses	\$1,621,954	\$230,765	(\$98,975)
Membership Dues	\$0	\$0	\$0
Special Events	\$0	\$0	\$0
Revenue In-Kind	\$313,612	\$167,569	\$0
Other	\$985	(\$8,310)	\$0

Prior Three Years Expense Allocations Chart

Expense By Type

Fiscal Year	2011	2010	2009
Program Expense	\$3,672,683	\$3,197,844	\$4,415,647
Administration Expense	\$486,050	\$426,520	\$478,823
Fundraising Expense	\$290,416	\$353,789	\$294,954
Payments to Affiliates	\$0	\$0	\$0
Total Revenue/Total Expenses	1.11	1.73	0.73

Program Expense/Total Expenses	83%	80%	85%
Fundraising Expense/Contributed Revenue	13%	6%	9%

Prior Three Years Assets and Liabilities Chart

Assets and Liabilities

Fiscal Year	2011	2010	2009
Total Assets	\$53,459,724	\$48,166,104	\$36,448,344
Current Assets	\$4,943,172	\$6,429,787	\$1,105,072
Long-Term Liabilities	\$630,192	\$928,251	\$1,358,161
Current Liabilities	\$784,463	\$696,981	\$1,216,563
Total Net Assets	\$52,045,069	\$46,540,872	\$33,632,283

Short Term Solvency

Fiscal Year	2011	2010	2009
Current Ratio: Current Assets/Current Liabilities	6.3	9.23	0.91

Long Term Solvency

Fiscal Year	2011	2010	2009
Long-term Liabilities/Total Assets	1%	2%	4%

Prior Three Years Top Three Funding Sources

Top Three Funding Sources

Fiscal Year	2011	2010	2009
Top Funding Source and Dollar Amount	Interest and Dividend \$1,621,954	Individuals \$4,605,835	Foundations / Corporations \$2,469,334
Second Highest Funding Source and Dollar Amount	Individuals \$1,104,173	Foundations and Corporations \$1,206,410	Earned Income \$703,502
Third Highest Funding Source and Dollar Amount	Earned Revenue \$803,811	Earned Revenue \$690,848	Individuals \$691,639

Endowment Value

\$11,132

Spending Policy

Percentage

Percentage(If selected)

4

Are you currently in Capital Campaign?

No

Capital Campaign Purpose**Campaign Goal**

-

Capital Campaign Dates

-

Capital Campaign Raised-to-Date Date**Capital Campaign Raised-to-Date Amount**

-

Capital Campaign Anticipated in Next 5 Years?

No

State Charitable Solicitations Permit

Yes Expires Oct 2011

State Registration

Yes

CEO Compensation

\$100,001 - \$125,000

CEO Comments

Grantmaking foundations are not measured by long term or short term solvency. We exist to support the Central Florida community and make grants to nonprofit organizations making a difference in Central Florida. The Community Foundation of Central Florida holds endowment for the Central Florida community which includes a small endowment to provide sustainable capital for the Community Foundation's operations.

Foundation Staff Comments

Financial figures taken from IRS form 990s.

990s and audits are reconciled.

Inkind revenue includes noncash and donated services as reported on the IRS form 990.

Disaster Programs**Is your organization a member of Voluntary Organizations Active in Disaster (VOAD)?**

No

Program Name**Program Description****Budget****Category**

Population Served

Program Previous Experience

Resources and/or services offered in disaster

Prepared 09.10.2012

C O M M U N I T Y F O U N D A T I O N
of Central Florida



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