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Board of Governors

About the Board

The governing body of the Foundation is the Board of Governors. The Trust Agreement creating the Foundation provides that each of the following organizations, or Appointing Authorities, is responsible for making an appointment to the Board: Clearwater and St. Petersburg Bar Associations (joint appointment); League of Women Voters of St. Petersburg Area and North Pinellas County (joint appointment); Pinellas County Board of County Commissioners; Pinellas County Medical Society; Pinellas County School Board; and the Chief Judge of the Sixth Judicial Circuit. The Trustees' Committee of the Foundation makes two appointments and the Board of Governors itself has the option of appointing six additional members.



J. Marvin Guthrie-Chair

Mr. Guthrie is an attorney practicing in the area of Estates and Trusts. He is a member of the Board of Directors of the Dunedin Fine Art Center and serves on the Salvation Army Community Advisory Board.



Louie N. Adcock, Jr

Louie N. Adcock, Jr., is associated with the St. Petersburg law firm of Fisher & Sauls. He received his law degrees from the University of Florida. In addition to a distinguished legal career in the area of trusts and estates, he has a broad history of community involvement in Pinellas County.



Maria N. Edmonds

Maria N. Edmonds served many years as Associate Provost at St. Petersburg College in Tarpon Springs. She currently chairs the Hispanic Leadership Council, is on the Board of Trustees of the YWCA of Tampa Bay and serves on the GAP Achievement Committee at Largo Middle School and Clearwater High School.



Sandra F. Diamond

Sandra F. Diamond is an attorney with Williamson, Diamond & Caton and practices in the area of trusts and estates. She is the Chair of the Real Property, Probate and Trust Law Section of the Florida Bar and serves on the boards of All Children's Hospital and All Children's Health Systems.



Virginia G. England

Virginia G. England is a Certified Public Accountant. She holds an undergraduate degree from Duke University. She is involved with Friends of the Largo Library, the Florida Botanical Gardens and Florida Craftmen, Inc. She also serves as Support Group Chairman of the Pinellas Chapter of the RLS Foundation.



Tamara Felton

Tamara Felton - Vice Chair is a former Assistant State Attorney is now in private practice in St. Petersburg. She is a member of Alpha Kappa Alpha Sorority.



Jack T. Lee

Jack T. Lee is a certified public accountant and is Contract Manager with Honeywell. He served as a volunteer for United Way on the allocations process for over 25 years.

Board of Governors



Sallie Parks

Sallie Parks is a graduate of Central Michigan University and attended Michigan State University for her advanced degree work. Appointed by Governor Jeb Bush in 2006 to the Governing Board of Southwest Florida Water Management District, Parks is chairperson of the Regulation Committee.



Jay H. Tiffin

Jay H. Tiffin is a retired banker who holds an undergraduate degree from Amherst College and a law degree from Boston University Law School. He is registered with the SEC and State of Florida as a Registered Investment Adviser.



Byron C. Smith

Byron C. Smith, a certified public accountant, is a shareholder and a Director of the Wealth Services division of the Tampa Bay firm of Gregory, Sharer & Stuart. He is a 1981 graduate of the University of South Florida with a degree in accounting.



Joseph L. Wells

Joseph L. Wells is an attorney and former Chairman and President of Ciba-Geigy Canada, Ltd. He chairs the International Relations Committee of the League of Women Voters of North Pinellas and serves on the board of Friends of the Nature Conservancy of Canada. He is also a member of Academy of Senior Professionals at Eckerd College (ASPEC).



Janice Starling-Williams

Janice Starling-Williams is the Administrator of Starling School & Day Care Center, Inc. in St. Petersburg. A member of the NAACP, she also serves as a youth teacher and is involved with the Juneteenth festival.



Harry S. Wilks, M.D.

Harry S. Wilks, M.D. is a specialist in rheumatology and internal medicine and is on the Morton Plant Hospital staff. He has volunteered at the Clearwater Free Clinic for over 25 years and received its Doctor of the Year Award in 1998. He is also a volunteer for the Clinic's Soup Kitchen, the Paul B. Stevens School for the Special Olympics, the Greenwood Panthers Football Team and Clearwater for Youth.

Former Board Members

Herman "Doc" Allen, Ed.D.

U. C. Barrett

Albert G. Blomquist

Lisa L. Brody

J. Fred Campbell

Joseph L. Carwise

Sandra M. Cassidy

Raymond H. Center, M.D.

Rev. Robert Coleman

Mary Lou Dobbs

J. Shirley Gracy

Philip P. Gray

Sarah Louise Halmi

Watson L. Haynes II

Israel L. Heard

C. Curtis Hess

Fred Hoffman

Althea Hudson

Elizabeth E. James

Richard C. Johnson

William H. Keeler, M.D.

John R. Kessinger

Glenn Kranzow

Constance R. Marquardt

Larry K. Meyer, Esq.

Stephen R. Miller

Reverend A. J. Moreau

Dan C. Ogle, M.D.

David J. Ottinger, Esq.

Sherman H. Pace, M.D.

Wray Register

Jan Regulski

Ralph Richards, Esq.

Arthur E. Steele

Dennis P. Thompson, Esq.

Edward A. Turville

Kenneth E. Webster

Eugene Williams

Trustee Banks

In 1969, 10 banks and trust companies in Pinellas County executed a Trust Agreement creating the Pinellas Community Foundation. The Trust Agreement envisioned the type of philanthropic organization that could help meet the changing needs of the community of Pinellas County. It would be set up to give wealthy people and those of moderate means an equal opportunity to accomplish their philanthropy within a flexible framework. The charitable funds they created would be permanently secure. The organization's governing body—an impartial and changing committee of Pinellas County citizens chosen for their understanding of philanthropic needs—would oversee the selection of charitable beneficiaries.

This was the beginning of the Pinellas Community Foundation. In 2009, ten banks and trust companies were signatories to the Trust Agreement. The representatives of these financial institutions constitute the Trustees' Committee, and each financial institution is authorized to receive and manage funds in trust for the Pinellas Community Foundation.

Fifth Third Bank

Teresa M. Gaffney, Vice President

Merrill Lynch Trust Company

Patrick Kenefick, Vice President

Northern Trust Bank of Florida

David A. Barshel, Vice President

Thomas Wellner, Vice President

Raymond James Trust Company

Shirley A. Jempson, Vice President

Regions Morgan Keegan Trust

Colleen Dauterman, Vice President

Margaret M. McGowan, Vice President

Sabal Trust Company

Nancy N. Friar, Senior Vice President

SunTrust Bank of Tampa Bay

Scott P. Callahan, J.D., Vice President

Synovus Trust Company

Jeanne Breland, Vice President

Wachovia Bank, NA

Beth Horner, Trust Advisor

U.S. Trust, Bank of America Private Wealth Management

Victor G. Santiago, Trust Officer



Building a **Better Future** Through
Environmental Improvement

2009 Grants and Distributions

Following are grants and distributions totaling \$1,926,576 awarded through the Community Foundation in our fiscal year of January 1, 2009 through December 31, 2009. The list is a combination of (1) grants awarded through our discretionary grants programs; (2) Field of Interest grants; and (3) distributions from both designated and agency endowment funds. These grants and distributions reflect the philanthropic spirit and vision of our many donors. The grants and distributions made, and the lives touched by them, serve as a reminder that the Pinellas Community Foundation is Building a Better Future for Pinellas County.

AFFORDABLE HOUSING

Total Affordable Housing: \$40,326

Clearwater Neighborhood Housing Services

Regular Operating Grant. \$10,000

Community Service Foundation

Regular Operating Grant. \$10,000

Habitat For Humanity of Pinellas County

Regular Operating Grant. \$10,000

Distribution From Their Endowment Fund. \$326

Shepherd's Village, Inc

Regular Operating Grant. \$10,000

ANIMAL WELFARE

Total Animal Welfare: \$61,738

Animal Services League

Distribution from their Endowment \$958

Clearwater Marine Aquarium

Distribution from Klauser Fund. \$27,059

Friends of Strays

Distribution from Klauser Fund. \$27,059

Pinellas Animal Foundation

Distribution from Klauser Fund. \$933

Distribution from their agency endowment. \$405

SPCA Tampa Bay

Distribution from Klauser Fund. \$5,000

Distribution from their endowment fund \$324

ARTS AND CULTURE

Total Arts and Culture: \$409,062

American Stage Company

Tonne Cultural Outreach Grant. \$5,000

Creative Clay

Tonne Cultural Outreach Grant. \$5,000

Dunedin Fine Art Center

Tonne Cultural Outreach Grant. \$2,900

Dunedin Historical Society

Tonne Cultural Outreach Grant. \$5,000

Florida Orchestra

Tonne Cultural Outreach Grant. \$3,600

Distribution from Anonymous Fund. \$660

Great Explorations

Regular Operating Grants. \$10,000

Laundry equipment for its preschool. \$2,000

Leepa Ratner Museum of Art

Tonne Cultural Outreach Grant. \$5,000

Morean Art Center

Tonne Cultural Outreach Grant. \$5,000

Museum of Fine Arts

Distribution from Vary Fund. \$41,127

Partners N Progress for the Arts

Distribution from Bailey Fund. \$3,755

St. Petersburg Historical Society. \$303

Schenectady County Historical Society

Distribution from Franchere Fund. \$300,000

2009 Grants and Distributions

Studio@620

Tonne Cultural Outreach Grant. \$3,500

Tampa Bay Symphony

Distribution from Dalzell Fund. \$5,217

BEHAVIORAL HEALTH CARE SERVICES

Total Behavioral Health Care Services: \$

Directions for Mental Health, Inc.

Regular Operating Grant. \$10,000

Operation PAR, Inc.

Basic Operating Grant. \$1,000

CHILDREN AND YOUTH SERVICES

Total Children and Youth Services: \$339,227

Big Brothers Big Sisters of Pinellas County, Inc.

Regular Operating Grant. \$10,000

3 ton air conditioning units. \$14,000

Repave parking lot, upgrade kitchen and equipment
. \$8,000

Distribution from their agency endowment. \$365

Boy Scouts of America, West Central Florida

Basic Operating Grant. \$4,000

Distribution from Clapp and Roebling Funds. \$4,449

Boys & Girls Clubs of the Suncoast

Regular Operating Grant. \$10,000

Brookwood Florida-Central, Inc.

Regular Operating Grant. \$10,000

New beds and dressers. \$10,000

Child Development Center

Regular Operating Grant. \$10,000

Distribution from their agency endowment. \$1,680

Christian Outreach Center

Faith Mission Christian Fund Grant. \$5,000

Clothes to Kids

Faith Mission Christian Fund. \$10,000

Community Pride Child Care, Inc

Regular Operating Grant. \$10,000

Distribution from their agency endowment. \$3,247

Playground equipment and playground resurfacing
. \$20,000

Upgrade bathrooms. \$7,000

Enhancement of playground equipment. \$7,000

Educational materials. \$5,000

Crystal Beach Youth Center

Faith Mission Christian Fund Grant. \$12,500

Father Flanagan's Girls and Boys Town

Distribution from Engelhardt Fund. \$3,080

Florida Sheriffs Youth Ranches

Distribution from Bennett Fund. \$849

Distribution from Roebling Endowment. \$1,116

Distribution from Tonne Fund. \$26,180

Florida United Methodist Childrens Home

Distribution from Wilson Fund. \$791

Girls Inc. of Pinellas

Regular Operating Grant. \$10,000

New roof. \$10,000

Heavy duty stacking chairs and dollies. \$10,000

Improvements to kitchens that provides girls' meals
. \$5,000

Happy Workers Children's Center

Regular Operating Grant. \$10,000

Distribution from Willie McAdams Endowment. \$833

Distribution from Florence Stanberry Endowment. \$811

Junior Achievement of West Central Florida

Regular Operating Grant. \$10,000

Pre-School Experience, Inc

Regular Operating Grant. \$10,000

New roof. \$16,000

Furniture and equipment. \$8,000

Raising Hope, Inc.

Faith Mission Christian Fund. \$5,000

Suncoast Voices for Children

Regular Operating Grant. \$10,000

YMCA of Greater St. Petersburg

Regular Operating Grant. \$10,000
Security improvements at its Harborside facility. . . \$5,000

YMCA of the Suncoast, Inc.

Basic Operating Grant. \$4,000
Faith Mission Christian Fund Grant. \$5,000

YWCA of Tampa Bay, Inc.

Regular Operating Grant. \$10,000
Bring bathroom into ADA compliance. \$5,000
Distribution from their endowment. \$326

DEVELOPMENTALLY DISABLED

Total Developmentally Disabled: \$101,536

Benedict Haven, Inc.

Regular Operating Grant. \$10,000

Caring and Sharing For Independent Living

Regular Operating Grant. \$10,000
Reusable modular wheelchair ramp systems. . . \$10,000
Partial year distribution from their endowment. \$65

Deaf and Hearing Connection of Tampa Bay

Regular Operating Grant. \$10,000

Lighthouse of Pinellas

Regular Operating Grant. \$10,000
Award from Walter Leahy Clearwater Breakfast Sertoma Club Memorial Endowment Fund. \$546

Pinellas Association For Retarded Children (PARC)

Regular Operating Grant. \$4,000
Privacy fences for residential facilities. \$3,000
Distribution from their endowment fund. \$308

Sailability Greater Tampa Bay

Regular Operating Grant. \$10,000

Upper Pinellas Association For Retarded Citizens (UPARC)

Basic Operating Grant. \$4,000
New air conditioning systems at "Habilitation Centers"
. \$9,000
Distribution from Zamoyski Fund. \$15,310
Distribution from UPARC/DAL. \$5,000
Distribution from UPARC/GAP Fund. \$307



Building a **Better Future**
For the **Developmentally Disabled**



Building a Better Future With Scholarships

EDUCATION AND SCHOLARSHIPS

Total Education and Scholarships: \$294,561

EDUCATION

Total Education: \$143,423

The Albany Academy

Distribution from Franchere Fund. \$52,500

Bridging the Achievement Gap

Faith Mission Christian Fund. \$5,000

College Fund of Pinellas

Regular Operating Grant. \$10,000

Distribution from Boudreau, Condon and Thompson
Funds. 1,036

The Crossnore School

Distribution from Arthur Fund. \$4,300

Largo Library Foundation

Distribution from Bailey Fund. \$3,755

New Opportunities School for Women

Distribution from Arthur Fund. \$4,300

North Bay Christian Academy

Faith Mission Donor Advised Fund. \$10,000

Pinellas Education Foundation

Distribution from Moffatt Fund. \$5,121

Pinellas Genealogy Society

Partial year distribution from their endowment. \$8

F. Kieman Schoonmaker Outstanding Educator of the Year Award

Bridget Bohnet. \$2,500

Science Center of Pinellas County

Regular Operating Grant. \$10,000

2009 Grants and Distributions

SCHOLARSHIPS

Total Scholarships: \$151,138

College Fund of Pinellas \$11,036

Awarded by the College Fund of Pinellas

Robert and Martha Eifert Memorial

Loan Fund \$14,233

Awarded by University of Florida College of Medicine

Graham-Bowman Scholarships. \$86,800

Shirrin Ahmadi	Kysha Lawton
Jacqlyn Bryant	Jennifer McCutcheon
Adrian Carr	Julia McKee
Kathryn Crum	Maggie Nicholson
Melissa Dorsey	Luisa Otamendi
Annabella Ferrari	Andrea Savas
Fabio Ferrari	Anjali Shetty
Regine Favien	Sarah Shideler
Joanna Ghioto	Shana Sobie
Bonnie Gill	Sulwia Stasik
Irene Hotalen	Lee Tobin
Anna Jachymiak	Jennifer Uzdavines
Leisa Kirschner	

Joy Anne Harris Scholarships. \$6,581

Awarded by St. Petersburg College

Costas G. Lemonopoulos Scholarships. \$12,920

Caitlin Balno	Randy Koral
Jessica Chochoon	Kyle Lewis
Justin Corder	Julian Lopera
James Dinan, Jr.	Tyler Lovelly
Shelby Dingle	Lacarenthia McCain
Stephen Fagan	Beverly McClung
Nicholas Flammia	Paul Mertz
Jose Garcia	Javier Palomino
Austin Glassman	Zachary Paynter
Jennifer Graham	Tyler Smith
David Hale	Kayla Speckman
Stacie Hamilton	Christopher Stephens
William Haug	John Stowell
Natalia Haxby	Angel Suarez
Jennifer Ireland	Lacey Timmons
Kiamesha Jones	Gerald Williams
Michael Klimovich	Randall Wright

Largo Elks Scholarships \$5,000

Anja Lena Cole
Daniel Huser
Zachary Rygiel

H. Robert Merrill Scholarship. \$4,512

Awarded by the University of Vermont

David G. Perkins, Jr. Tribute Scholarship. \$500

Awarded by St. Petersburg College

Ralph Richards Memorial Scholarship. \$500

Awarded by St. Petersburg College

Dennison Rusinow Memorial Scholarship. \$5,000

Kanita Beba
Ajla Fatkic
Vanessa Muratovic

F. Kiernan Schoonmaker Memorial Scholarship \$500

Awarded by St. Petersburg College

Aneta I. Thomas Scholarship. \$3,556

Awarded by Tri-State University

ELDERLY SERVICES

Total Elderly Services: \$14,542

Faith in Action of Upper Pinellas County

Regular Operating Grant. \$10,000
Distribution from their own endowment. \$326
Distribution from Gordon Fund. \$660

Florida Geriatric Research Program

Distribution from Thomas Fund. \$3,556

ENVIRONMENTAL

Total Environmental: \$35,403

Audubon of Florida

Distribution from Bushnell Fund. \$6,892
Distribution from Tonne Fund. \$26,180

Clearwater Audubon Society

Distribution from their endowment. \$331

The Pier Aquarium

Catherine W. Grant Environmental Improvement Award
. \$2,000



Building a
Better Future
 for the **Uninsured**
 and **Underinsured**

FAMILY SERVICES

Total Family Services: \$114,636

Citizens Alliance For Progress

Regular Operating Grant. \$10,000
 Faith Mission Christian Fund Grant. \$10,000
 Utility sinks. \$2,000

Daystar Life Center

Regular Operating Grant. \$10,000

Family Resources, Inc.

Basic Operating Grant. \$4,000
 Replace air conditioning at group homes. \$12,000
 Replace air conditioning. \$10,000

Family Service Centers, Inc.

Basic Operating Grant. \$10,000
 Repair and update bathrooms. \$10,000

Pinellas County Urban League, Inc.

Regular Operating Grant. \$10,000

RCS Food Bank

Regular Operating Grant. \$10,000

Salvation Army-Clearwater Corps

Distribution from Engelhardt Fund. \$3,080
 Distribution from Thomas Fund. \$3,556

United Methodist Cooperative Ministries/Suncoast

Regular Operating Grant. \$10,000

HEALTH CARE

Total Health Care: \$301,903

All Childrens Hospital Foundation

Distribution from Kessler Fund. \$14,825
 Distribution from their agency endowment. \$346

American Cancer Society

Distribution from Engelhardt Fund. \$3,080

American Heart Association

Distribution from Engelhardt Fund. \$3,080
 Distribution from Thomas Fund. \$3,556

American Lung Association

Distribution from Engelhardt Fund. \$3,080
 Distribution from Thomas Fund. \$3,556

Arthritis Foundation

Distribution from Thomas Fund. \$3,556

Clearwater Free Clinic

Regular Operating Grant. \$10,000
 Distribution from Bennett Fund. \$849
 Distribution from their agency endowment. \$336

Hospice of Florida Suncoast

Distribution from Bennett Fund. \$849
 Distribution from Margaret Craig Thompson Fund. . \$187

Morton Plant Hospital

Distribution from Fields Fund. \$5,123

Morton Plant Mease Foundation

Distributions from Moffat, Mullin and Zamoyski Funds
 \$34,760
 Distribution from Thomas Fund. \$3,556

St. Anthony's Hospital

Distribution from Reuter Fund. \$70,681

St. Petersburg Free Clinic

Regular Operating Grant. \$10,000

St. Jude's Research Hospital

Distribution from Dalzell and Mullin Funds. \$7,383

Shriners Hospitals For Children

Distribution from Bennett Fund. \$849
 Distribution from Franchere Fund. \$52,500
 Distribution from Zamoyski Fund. \$14,233

Sloan-Kettering Cancer Center

Distribution from Dalzell Fund. \$5,217

Tampa Bay Research Institute

Distribution from Frances G. Prasse Trust. \$398

Willa Carson Health Resource Center

Regular Operating Grant. \$10,000
 Video surveillance system. \$5,000

HOMELESS SERVICES**Total Homeless Services: \$34,000****ASAP Homeless Services, Inc**

Regular Operating Grant. \$10,000
 Video security and surveillance system. \$8,000

Homeless Emergency Project, Inc.

Regular Operating Grant. \$10,000
 Bicycle locks and parts. \$6,000

INFORMATION AND REFERRAL SERVICES**2-1-1 Tampa Bay Cares, Inc.**

Regular Operating Grant. \$10,000

PUBLIC BROADCASTING**Total Public Broadcasting: \$6,717****WEDU Public Broadcasting**

Cathleen W. Grant Public Communications Award. \$1,500

WUSF Public Broadcasting

Distribution from Dalzell Fund. \$5,217

RELIGION**Total Religion: \$6,927****Billy Graham Evangelistic Association**

Distribution from Helen D. Scott Endowment. . . . \$2,671

Crystal Beach Community Church

Faith Mission Christian Fund. \$700

First Methodist Church Clearwater

Distribution from Thomas Fund. \$3,556

WOMEN'S SERVICES**Total Women's Services: \$49,703****Alpha House of Pinellas**

Regular Operating Grant. \$10,000
 Security improvements. \$4,000
 Distribution from their endowment. \$703

CASA (Community Action Stops Abuse)

Regular Operating Grant. \$10,000

Haven of RCS

Regular Operating Grant. \$10,000
 Bicycles, locks, helmets, storage shed. \$5,000

Kimberly Home Pregnancy Center

Regular Operating Grant. \$10,000

MISCELLANEOUS**Goodwill Industries Suncoast**

Distribution from Tonne Fund. \$104,722

Funds of the Pinellas Community Foundation

Unrestricted Funds. These funds allow the Foundation to allocate the donor's gift to support the unmet or future charitable needs of the Pinellas community. In 2009, the Foundation funded 48 charitable organizations in Pinellas County. Services provided by these organizations included affordable housing, children and youth, elderly, health care, women, family services and animal welfare.

Restricted Funds. These funds benefit charities specified by donors. In 2009, approximately 50 charities that were designated by donors received distributions from the Foundation.

Field of Interest Funds. Donors who create a field of interest fund name the cause or issue which they desire to support. The Foundation, through a competitive process, selects the organizations for grants from those funds. Currently, the Foundation has Field of Interest funds for the environment, public broadcasting, and social and human services.

Donor Advised Fund. The donor advises the Foundation about how distributions are to be made. The Foundation's

Donor Advised Funds are governed by an Agreement between the donor and the Foundation and by the Foundation's Guidelines for Donor Advised Funds.

Scholarship Funds. In 2009, the Foundation administered nine donor-established scholarship programs and distributed \$151,138 for scholarships.

Agency Endowment Funds permit non profits to create permanent revenue streams. Incomes from endowments allow them to weather unforeseen circumstances that might otherwise necessitate the curtailment of services. By placing endowments at the Foundation, these organizations have access to a level of expertise not readily available to other nonprofits. By working with the Community Foundation, these agencies safeguard their endowments forever.

On the following page is an alphabetized listing of Foundation funds which include the types of funds described above. The Community Foundation holds over 100 funds and is committed to helping all of our donors become philanthropists by connecting them to the causes they care about most.



Building a **Better Future** by
Supporting Early Education

Irma L. Abberton Fund
 Alpha House of Pinellas, Inc. Endowment Fund
 Animal Services League, Inc. Endowment Fund
 Glenn and Carol Arthur Field of Interest Fund
 Phyllis E. Bailey Memorial Fund
 Charles and Ollie Belt Fund
 Ernest and Carolyn Benedict Fund
 Thomasene Bennett Fund
 Big Brothers/Big Sisters of Pinellas, Inc.
 Endowment Fund
 Bollenback Donor Advised Fund
 Margaret Boudreau Fund
 Warren J. Bowman Memorial Scholarship Fund
 John A. Brady Fund
 Tom Bruckman Operating Expense Fund
 Ruth Burgett Fund
 William P. Bushnell Fund
 Child Development Center, Inc. Endowment Fund
 Joseph A. Clapp Fund
 Helen S. Clark Fund
 Clearwater Audubon Society Endowment Fund
 Clearwater Free Clinic Endowment Fund
 College Fund of Pinellas County Endowment Fund
 Community Pride Child Care, Inc. Endowment Fund
 Janet L. Cooper Fund
 Scott and Verna V. Crain Fund
 Clara K. Dalzell Fund
 K. Whitney Dalzell Fund
 Edith J. Diehl Fund
 Robert and Martha Eifert Memorial Loan Fund
 Marguerite Emanuelsen Fund
 Carl L. and Ruth A. Engelhardt Fund
 Faith in Action of Upper Pinellas Endowment Fund
 Faith Mission Donor Advised Fund
 Michael Fields Memorial Fund
 Earl and Dorothy Frazell Fund
 Billy Graham Evangelistic Association Fund
 Mario E. Granata Fund
 Cathleen W. Grant Field of Interest Fund
 Edith B. Green Fund
 John B. and Lillian Green Fund
 Carmela Habert Fund
 Habitat for Humanity of Pinellas Endowment Fund
 Marjorie E. Hamilton Fund
 Happy Workers Children's Center Endowment Fund
 Joy Anne Harris Scholarship Fund
 Mary K. Haworth Fund
 Aaron F. Head Fund
 Dorothy B. Howard Fund
 Janet A. Huntley Music and Arts Public Education Fund
 Willis E. Hutchinson Fund
 William R. Kane Fund
 Harriett Kelso Fund
 Madge M. Kempe Fund
 Betty P. Kessler Fund
 Edna A. Klauser Fund
 Largo Elks Scholarship Fund
 Walter Leahy Memorial Fund (Clearwater Breakfast
 Sertoma Club)
 Costas G. Lemonopoulos Scholarship Fund
 Catherine M. Lerenman Fund
 George W. Linker Fund
 Shirley J. Magie Fund
 Harold C. and Isabel Martens Endowment Fund
 Willie Lee McAdams Endowment Fund for Happy
 Workers Children's Center
 Howard McGlasson Fund
 Muriel McNeVins Fund
 W. Wallace Meissner Fund
 H. Robert Merrill Scholarship Fund
 Barbara Rose Miller Fund
 Wahnetah Moffatt Fund
 Ellen M. Mullin Fund
 Chester Ochs Fund
 Virgil and Meta Osborn Memorial Fund
 David and Naomi Perkins Scholarship Fund
 Pinellas Animal Foundation Endowment Fund
 Pinellas Association for Retarded Children (PARC)
 Endowment Fund
 Donald and Leila Pouttu Fund
 Angela Probst Fund
 Lucile H. Reno Fund
 Agnes M. Reuter Fund
 Joy Gilmore Roebling Fund
 Frank and Helen Rugg Memorial Fund
 Dennison Rusinow Memorial Scholarship Fund
 Chester M. Schlicklin Fund
 F. Kiernan Schoonmaker Memorial Fund
 F. Kiernan Schoonmaker "Teacher of the Year"
 Award Fund
 Helen S. Scott Fund
 SPCA of Tampa Bay Endowment Fund
 Florence Stanberry Endowment for Happy Workers
 Children's Center
 Paul Stegelmaier Fund
 Florence Stilwell Fund
 Mildred A. Stribling Fund
 Tampa Bay Research Institute Endowment Fund
 Maud Ward Tate Fund
 Aneta L. Thomas Fund
 Margaret Craig Thompson Memorial Fund
 Marjorie E. Thompson Fund
 Bernice S. Tilton Memorial Fund
 Theodore and Marian Tonne Fund
 Wilbur O. and Doris Mildred Townsend Fund
 Upper Pinellas Association for Retarded Citizens
 (UPARC) Endowment Fund
 Marjorie B. Vary Fund
 Violet Wakefield Fund
 Ferne M. Waldman Fund
 Cecile L. Warner Fund
 Robert G. Wilson Fund
 Josephine L. Zamoyski Fund
 Walter Zimmerman Fund

Combined Endowment Funds

Since 1969, the Pinellas Community Foundation (Foundation) has served the needs of donors and non-profits in Pinellas County. One of the oldest community foundations in Florida, the Foundation is an aggregate of funds set up by individuals, families and organizations to support charitable organizations.

The Foundation's Combined Endowment Fund currently holds endowments benefiting twenty-eight (28) organizations. The purpose of having these various accounts in one fund is to realize substantial savings on fees and costs. The larger asset size also allows the fund the opportunity to maximize investment and performance. The Trustee fee was negotiated by the Foundation so that the beneficiaries would receive the maximum income possible from their respective endowments. The Trustee bank is responsible for holding and investing moneys in the fund and furnishing statements to the Foundation.

The Foundation handles all other administrative matters relating to the fund which includes tracking each organization's percentage share of the fund, distributing net income annually to each organization, coordinating with the Foundation's independent accountant on audits and tax filings and handling all pertinent correspondence.

Regarding investment style, since its establishment, the Foundation has been committed to returning the maximum amount of income to beneficiaries. The Foundation has an Investment Oversight Committee which periodically, but at least annually, reviews the

investment performance of the trustees and ensures that they are observing our guidelines for investment.

Our spending policy is that only net income is distributed to beneficiaries; however, an agency may choose to have the interest reinvested over a period of years to increase the size of the fund.

The Combined Endowment Fund also gives donors – some of whom already support current operations and programs of the agency they wish to benefit– the opportunity to provide for the future needs of that agency. There are many types of gifts and giving vehicles that provide donors with the maximum tax and financial benefits. They include:

- A gift of non-cash assets, including appreciated stock, retirement plan assets and life insurance.
- A bequest, which is a deferred gift given through a donor's will.
- A life income gift, which allows a donor to make a charitable gift and also receive a stream of income for life. The two most common types of life income gifts are charitable gift annuities and charitable remainder trusts.
- A charitable lead trust, which helps a donor reduce gift and estate taxes when passing assets on to heirs. Trust income is paid to a charity annually for a period of years; at the end of the term, the trust principal passes to family members.

Agency Endowment Funds

The following charitable organizations have placed their endowment funds at the Foundation as a means of protecting and enhancing these charitable funds for the future. Endowment funds are particularly useful to organizations whose contributions fluctuate with changing economic conditions. They demonstrate the organization's security, stability and long-range financial, and help fulfill its mission in perpetuity. Distributions from these funds are made annually from the net investment earnings of the funds to the named not-for-profit organization.



Building a **Better Future**
through **Cultural Outreach**

All Children's Hospital
ALPHA House of Pinellas
Animal Services League
Big Brothers/ Big Sisters
Boy Scouts of West Central Florida
Billy Graham Evangelistic Association
**Caring and Sharing for
Independent Living**
Child Development Center
Clearwater Audubon Society
Clearwater Free Clinic
College Fund of Pinellas
Community Pride Child Care
Faith in Action of Upper Pinellas
Florida Sheriffs Youth Ranches
**Habitat for Humanity of
Pinellas County**
Happy Workers Children's Center
Hospice of Florida Suncoast
**Willie Lee McAdams Endowment for
Happy Workers Children's Center**
PARC
Pinellas Animal Foundation
Pinellas Genealogical Society
SPCA Tampa Bay
St. Petersburg Museum of History
**F. Kiernan Schoonmaker "Teacher of
the Year" Award Fund**
**F. Kiernan Schoonmaker Memorial
Award Fund**
**Florence Stanberry Endowment for
Happy Workers Children's Center**
Tampa Bay Research Institute
UPARC/DAL
UPARC/GAP
**Walter Leahy Clearwater Breakfast
Sertoma Club Memorial**
YWCA of Tampa Bay Foundation

Why Choose the Pinellas Community Foundation?

For 40 years, people like you have invested in the promise of tomorrow through the Pinellas Community Foundation. More than 100 funds established by generous donors support community programs, scholarships and community services. To date, the Foundation has awarded over \$26,000,000 in grants to scores of non-profits and scholarship recipients. Simply put, the Foundation fulfills your vision of a better community and changes people's lives. It is Building a Better Future for Pinellas County.



Key Reasons To Create A Fund

- **Permanent Legacy** – You can create a legacy that will provide community support for years to come through an endowed fund.
- **Personal and Professional Attention** – The Foundation's staff has expertise in helping transform charitable ideas into philanthropic funds that change lives. Our grant making program is tailored to encompass specific charitable values and interests.
- **Flexibility** – One of the Foundation's priorities is to make reaching philanthropic goals simple. You can use a wide variety of assets to create funds that address charitable interests.
- **Maximum Tax Benefits** – As a public nonprofit agency with approved 501(c)(3) status, the Pinellas Community Foundation offers you the most advantageous tax benefits for charitable giving.
- **Fund Management** – Funds are invested and managed by professional money managers. The Investment Oversight Committee and Board of Governors oversee the Foundation's investment goals and objectives.
- **Simplicity** – The Foundation can help you establish a fund with one easy-to-read document. We're local, easy to reach, and available at your convenience.

Building a Better Future for new Americans

How To Create A Fund

Creating A Fund Is As Easy As 1 - 2 - 3

1. Define your charitable objectives with the help of Foundation staff. This preliminary meeting can include discussion with your professional advisor about the many tax benefits of charitable gifts.
2. Name your fund. Many people choose to honor their family name. Or, they may honor a family member or friend. (Example: John Doe Family Fund OR Jane Doe Memorial Fund.)
3. Seed your fund with cash, real estate, securities or other appropriate options.

Once the assets are transferred, your vision becomes a reality.

Is The Foundation An Alternative To A Private Or Family Foundation?

Yes – and without all the extensive legal costs and paper work. The Foundation assumes all of the administrative and reporting requirements. This type of fund can be created in a day versus several months.

A fund with the Foundation offers many advantages, along with greater charitable tax benefits. For example, gifts of cash or ordinary property to the Foundation are deductible up to 50% of adjusted gross income (AGI). Gifts to private or family foundations are deductible only to 30% of AGI. Similarly, gifts of appreciated property to community foundations can be credited for 30% compared to 20% for a private foundation. There are no excise taxes on community foundations as there are on private foundations and community foundations do not have a requirement that a certain percentage must be distributed each year.



The Membership Program at PCF

The Membership Program of the Foundation was started in 1984 with 8 members who donated a total of \$1,000. Its purpose is to raise additional moneys which go directly to the Summer Competitive Grants program. In 2009, 95 members donated a total of \$31,500.

Life Members

(\$10,000 or more in one year or cumulatively)

AmSouth Bank
AmSouth Bancorporation Foundation
Thomas R. Bruckman
George and Hank Hardy
Betsy H. Leidtke
Pinch A Penny, Inc.
Regions Morgan Keegan Trust
Ralph and Audrey Scheidenhelm

Benefactor Members

(\$500 or more in 2009)

Mary Wyatt Allen
Dr. and Mrs. A.J. Bidani
Bob and Merry June Burwell
Harry and Sandy Jamieson
John and Sara Kessinger
Bernard J. Lechner
Barbara Lemonopoulos
Robert J. McDermott
Jan Regulski
David and Nancy Ridenour
Steve Sika
Mr. and Mrs. Wilber G. Van Scoik
Joseph L. and Erika Wells

Patrons

(\$100 to \$500 in 2009)

Louie Adcock, Jr.
Benedict Haven, Inc.
Nina Berkheiser
A.J. Bidani, M.D.
Mark Brandt
Thomas R. Bruckman
Steven L. Cass
Susan H. Churuti
Mr. and Mrs. Robert K. Clark
W.S. Connolly
Andrew Csanady
Colleen Dauterman
Susan H. Dees
Rebecca L. deMaCarty
Sandra F. Diamond
Holly Duncan
H. James Eaton
Jane S. Egbert
Virginia G. England
J. Edward and Gladys Evan
Florida United Networkers
Chip and Gail Gamble
Dianne Wheatley Giliotti
Linda S. Griffin-Keliher

Isay M. Gulley
J. Marvin Guthrie
Scott Hale, M.D.
Janet and Phil Henderson
Michael G. and Claire Howatt
Harry and Sandy Jamieson
Wesley Jenkins
James E. and Connie L. Lashbrook
Bruce Livingston
Rae Cappallo Lynch
R. Bruce McManus
Larry and Scarlett Meyer
Jamie and Denise Neilson
Operation Par
Sallie Parks
David and Betty Perkins
Janet K. Rosenquist
Julie and David Scales
Shepherd's Village
John Stoner
Dennis P. Thompson
Jay and Sue Tiffin
John S. Tiffin
W.J. Voegel Financial Services
Carlton L. Wiedemeyer

Members

(\$25 to \$100 in 2009)

Harold F. Albers
ASAP Homeless Services
Samuel P. Barker III
David Barschel, Sr.
James A. Baxter
Debra A. Bushnell, Esq.
Caring and Sharing for Independent Living
Murray J. Dubner
Maria N. Edmonds
John E. M. Ellis
Jocelyn Foley-Creech
Sally H. Foote
Richard J. Fuller
Dr. William and Jeanette Hale
Doris E. Hanson
Jane L. Harper
Homeless Emergency Project
Shirley A. Jempson
Jack T. Lee
Christine Patel
Jerry Spilatro
Rev. Paul Stake
James R. Stearns
James F. Van Middlesworth
Elizabeth Wajdowicz
Marion T. Yongue
YWCA of Tampa Bay

2009 Committees of the Foundation

Audit and Long Range Planning

Sandra F. Diamond, Chair
Louie N. Adcock, Jr.
Maria N. Edmonds

Cultural Outreach Grants

Maria Edmonds, Chair
Louie Adcock
Sallie Parks

Faith Mission Christian Fund

Pastor Paul Stake, Chair
Thomas R. Bruckman
Robert Curtis
Matthew Lis
Fred E. Marquis
Sallie Parks

Fall Competitive Grants

Virginia England, Chair
J. Marvin Guthrie
Janice Starling-Williams
Harry S. Wilks, M.D.

Graham-Bowman Scholarships

William E. Hale, M.D., Chair
Louis N. Adcock, Jr.
Thomas R. Bruckman.
Robert J. Entel, M.D.
Jack J. Geller
Janet Henderson
Steven Sika
Elizabeth Wajdowicz
Harry S. Wilks, M.D.

Investment Oversight

Joseph L. Wells, Chair
Jack Lee
Byron Smith

Nominating Committee

Sandra F. Diamond, Chair
Louie N. Adcock, Jr.
J. Marvin Guthrie
Sallie Parks

Operating Grants

Joseph L. Wells, Chair
Sandra F. Diamond
Sallie Parks
Byron Smith

Personnel

J. Marvin Guthrie, Chair
Tamara Felton
Joseph L. Wells

Summer Competitive Grants

Tamara Felton-Chair
Jack Lee
Jay H. Tiffin
Trustees' Committee Representative

Foundation Staff



Julie Scales joined the Foundation as Executive Director on October 1, 2003. Prior to becoming a part of the Foundation, she practiced law for over twenty years, primarily in the areas of public finance and government law. She has long been active in professional associations and has served on the boards of many not-for-profit organizations. She received her undergraduate degree from Trinity College in Washington, D.C. and law degree from Creighton University in Omaha, Nebraska.



Rae Cappallo Lynch has served the Foundation as Administrative Assistant since April of 2003. She attended the University of South Florida and George Mason University in Virginia where she majored in accounting. She previously worked as a financial analyst for a major defense contractor in Alexandria, Virginia and for Tech Data in Clearwater.

Statement Of Activities

Year Ended December 31, 2009

REVENUES

Contributions and bequests received	\$144,721
Grants refunded	\$2,075
Income from Investments	\$760,764
Income from Permanently Restricted Trusts	\$1,538,377
Net Gain (Loss) On Investments And Interests in Permanently Restricted Trusts	\$6,006,851
Total Revenues	\$8,452,788

EXPENSES AND FEES

Administrative Expenses	\$141,758
Trustee Fees	\$433,522
Total Expenses and Fees	\$575,280

INCREASE IN NET ASSETS

Before Charitable Disbursements \$7,877,508

CHARITABLE DISBURSEMENTS

Grant Payments Made \$1,926,576

INCREASE IN NET ASSETS

After Charitable Disbursements \$5,950,932

Net Assets, Beginning of Year \$58,264,320

Net Assets, End of Year \$64,215,252



Building a **Better Future**
One Life at a Time