REPORT TO THE COMMUNITY

BE BOLD

COMMUNITY FOUNDATION OF BROWARD

REPORT TO THE COMMUNITY
COVER STORIES IN ACTION

The people you see on the cover of this report have interesting stories to tell. Check out their videos, and many more, on the Community Foundation of Broward YouTube Channel.

Visit https://cfbroward.link/Impact-Videos

Scan the QR code to view the entire video collection.
<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1984</td>
<td>$197 Million</td>
<td>The Community Foundation of Broward was established</td>
</tr>
<tr>
<td></td>
<td>$21 Million</td>
<td>Assets managed by the Foundation</td>
</tr>
<tr>
<td>453</td>
<td></td>
<td>New gifts to the Foundation</td>
</tr>
<tr>
<td>$11.8</td>
<td>Million</td>
<td>Charitable Funds created by generous philanthropists and managed by the Foundation</td>
</tr>
<tr>
<td>$108</td>
<td>Million</td>
<td>Record amount granted from charitable Funds</td>
</tr>
<tr>
<td>32</td>
<td></td>
<td>Total amount granted since the Foundation opened its doors</td>
</tr>
<tr>
<td>155</td>
<td></td>
<td>Number of Community Builders who created an endowed Fund with one million dollars or more</td>
</tr>
<tr>
<td>$252</td>
<td>Million</td>
<td>Number of Legacy Society members who have included the Foundation in their will/estate plan</td>
</tr>
<tr>
<td>Top 100</td>
<td>$252 Million</td>
<td>Total amount of planned/estate gifts promised to the Foundation by Legacy Society members</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ranked among the nation’s top community foundation for five years running</td>
</tr>
</tbody>
</table>

*Data as of June 30, 2018 unless otherwise noted

We gratefully acknowledge our friends who make this publication possible:

**Bessemer Trust**

**Harry T. Mangurian, Jr. Foundation, Inc.**
BROWARD’S ISSUES THAT MATTER

Foundation Fundholders take **BOLD** action on important issues through grants from their charitable Funds

**ECONOMIC INDEPENDENCE**

*Provide a hand up and not a hand out to move struggling families from surviving to thriving*

**RECENT IMPACT:**
- **STRONGER FAMILIES:** 77 lower-income families will achieve the American dream of home ownership through support of a first-of-its-kind Habitat for Humanity community in Pompano Beach.
- **STEPS TO STABILITY:** More than 500 struggling adults have stable housing, advanced their education and found better jobs.

**CANCEL CANCER**

*Advance local breakthrough cancer research and lifesaving clinical trials that are easily accessible to all residents*

**RECENT IMPACT:**
- **BREAKTHROUGH RESEARCH:** The lives of more than 500 local cancer patients have been changed forever through cutting-edge research and clinical trials our Fundholders made possible at South Florida hospitals and universities.
- **PATIENT SUPPORT:** More than 1,000 Broward cancer patients and their families received emotional and financial support and transportation while going through treatment.

**ART OF COMMUNITY**

*Ignite creativity, invoke community pride and create a sense of place through the arts that connects people to where they live and to each other*

**RECENT IMPACT:**
- **UNITE THE COMMUNITY:** Residents in 10 Broward cities have been brought together through murals, splash pads, walking trails, filmmaking, theater productions, culinary experiences, music and more.
- **TOGETHER WE HEAL:** After the Marjory Stoneman Douglas tragedy, the Healing With Art program at the Coral Springs Museum of Art helped survivors and others deal with the emotions and anxiety resulting from the school shooting.

**DIGNITY IN AGING**

*Ensure residents age 80 and older have a safety net that allows them to live life to the fullest*

**RECENT IMPACT:**
- **BROAD INFLUENCE:** We shined a light on the challenges facing our 80+ year old neighbors through the release of a comprehensive study on Broward’s older population. The court system, news media, municipalities and nonprofits now use our research to focus their efforts and create greater impact.
- **NO LONGER ALONE:** Nearly 90% of older residents report feeling less lonely and have a better quality of life after taking part in programs that reduce elder isolation.
SCHOOL IS COOL
Increase Broward’s high school graduation rate to 90% by focusing on middle school success

RECENT IMPACT:
• MORE GRADUATES: Broward’s high school graduation rate has increased from 71.6% to 84.3% since our School is Cool initiative was launched in 2011.
• LONG-TERM IMPACT: Middle school education will be forever changed in Broward through a social and emotional education initiative piloted in 10 Broward middle schools. It was brought to life by the largest grant the Foundation has ever awarded – $3 million over 3 years, matched by the School District.

ECO BROWARD
Empower all residents to make Broward a more livable and sustainable place to call home

RECENT IMPACT:
• CLEANER AND COOLER: More than 30,000 trees and seedlings have been planted, creating a cooler, cleaner and healthier community – with new habitat for native wildlife.
• SOLID SHORELINE: More than 20 new sand dunes and thousands of mangroves and sea oats have been planted to protect Broward’s coastline.

BROWARD PRIDE
Increase equality, inclusion and acceptance of Broward’s LGBT community across all ages and within every part of our community

RECENT IMPACT:
• REAL-WORLD IMPACT: Homeless LGBT residents have a second chance. LGBT students get support at school. Local organizations and municipalities are becoming more inclusive. These are the early impacts of research detailed in our eye-opening Broward Pride Report to the Community.
• LONG-TERM COMMITMENT: More than $8.4 million has been awarded by the Foundation to support 500+ programs that improve the lives of our LGBT neighbors, since 1984.

BFIT
Empower people to take control of their health to prevent and reverse life-threatening, weight-related illnesses

RECENT IMPACT:
• INCREDIBLE RESULTS: Emergency room visits by lower-income residents have been cut in half in communities where one-on-one wellness support is now available.
• A HEALTHY COMMUNITY: Residents of Lauderdale Lakes are healthier and living more active lifestyles since the city launched new initiatives to promote better nutrition and more active lifestyles.

ANIMAL WELFARE
Ensure that Broward’s animals are treated with respect and live safely without threat of abuse or neglect

RECENT IMPACT:
• COMPASSION AND CARE: Over 1,000 dogs and cats have received emergency medical care, were spayed/neutered and placed in forever homes. Nearly 400 sick and injured animals were treated and returned to their natural habitat.
• AN INNOVATIVE SOLUTION: One of only a few nationwide, a domestic violence shelter that helps families in crisis – and their pets – recently opened in Broward. Fundholders made this local, lifesaving resource possible.

YOUTH WORK
Shape tomorrow’s workforce by helping young people gain critical skills to build their lives and future careers

RECENT IMPACT:
• PATH TO SUCCESS: More than 700 local youths gained hands-on work experiences with major companies through new employment matching programs.
• BRIGHTER FUTURE: To help address Broward’s skilled labor shortage, a new program helps economically disadvantaged high school students get the training and certification needed to find jobs in the construction industry.
COMMUNITY BUILDERS

BOLD leaders who love our community and establish endowed charitable Funds of one million dollars or more

SUE AND JIM ACHESON
Jim Acheson’s grandfather helped Thomas Edison create the light bulb. This inquisitive spirit has, for three generations, inspired the Acheson family to improve their communities. They established the James C. Acheson Fund to support innovative projects.

MARION T. AND PERCY P. ARCHIBALD
Marion wanted to be forever connected to her husband, Percy, and created a charitable Fund in both their names to honor their marriage after he passed away. The couple has built a legacy of impact through the Percy P. and Marion T. Archibald Fund, which provides support to public broadcasting, the visually-impaired and paramedics and their families.

SALLY AND FRANK ATLASS
A shared passion for boating drew Sally and Frank to Broward. Frank established Atlass Insurance in 1981 and built the company on the philosophy that “specialization makes hard problems simple.” To invest in a brighter future for our community, when Frank sold the business, they created the Sally and Frank Atlass Charitable Fund.

JAMES I. CODDINGTON, JR.
Born in New Jersey, James lived in Virginia, New York, Nantucket and Chicago, but finally put down roots in Lauderdale-by-the-Sea. He believed good health was the right of all. The James I. Coddington, Jr. Charitable Fund improves the health of all those in his beloved community.

RANDY AND LARRY COTTER
When Randy and Larry Cotter lost their sister Elizabeth to cancer, they wanted to honor her accomplishments as a teacher and Olympic equestrian. To educate youth, help animals and support equestrian programs for children they established the Elizabeth Cotter Memorial Fund.

LIBBY AND JACK DEINHARDT
Libby and Jack Deinhardt’s bold leadership united community leaders in Broward to bring out the best in strategic philanthropy. They established the Community Foundation to connect people who care with causes that matter. The Libby and Jack Deinhardt Funds empower the Foundation they created to forever respond to the changing needs of the community they loved.

LEONARD AND ANTDJE FARBER
Originally from New York, Leonard Farber, a pioneer in the development of suburban shopping centers, changed the retail landscape of South Florida in the 1970s. He was also a founding Community Foundation Board member. The Leonard and Antje Farber Endowment Fund was established by Leonard and his wife Antje to improve the welfare of our most vulnerable residents.
DOROTHY AND HAROLD FRANKS
To honor his wife, Dorothy, who battled cancer and arthritis, Harold established three Dorothy and Harold D. Franks Funds at the Foundation. They support research into both these diseases and address the urgent needs of the beloved community Harold called home for 60 years.

RICHARD FRISBY
Born in Indiana, Richard Frisby joined the U.S. Navy to see the world. He returned home and used his natural business acumen to open a chain of successful men’s fine clothing stores in South Florida, New York City and Maine. He created the Richard Frisby and Edward Burkhart Fund to make a lasting impact on the causes he cared about in the LGBT community.

GERTRUDE GRAY
A graduate of Albion College at a time when few women were even admitted to universities, Gertrude believed passionately in education. The Gertrude Gray Memorial Scholarship Fund was established to provide college scholarships to Broward high school students.

HUDSON FAMILY FOUNDATION
The Hudson family’s entrepreneurial spirit, inspired leadership and steadfast integrity have driven the success in many of their endeavors, including the real estate and waste management industries. Those same values are reflected in their philanthropy. Through the Hudson Family Fund, their legacy of community leadership and positive change will continue.

FREDERICK W. JAQUA
By setting up the Frederick W. Jaqua Fund, Frederick wanted his legacy to preserve the quality of life in our community. He valued excellence and understood the many components that must come together to assure a healthy, vibrant community.

HARRIET AND JACK KAYE
Harriet and Jack were enthusiastic patriots. It was important to them that young people learn firsthand the intent of our Founding Fathers, so they established the Jack and Harriet Kaye Fund to help Broward students attend Spirit of America conferences in Valley Forge, PA.

GINNIE AND DICK KEARNS
Ginnie and Dick first met as infants, beginning a lifelong love. Along the way, they raised two children, worked hard to build successful businesses and developed a strong family tradition of helping those in need. Through the Kearns Family Foundation Fund, their family values will shape their philanthropy for generations to come.

STEPHEN A. KELLER
Stephen was a successful industrialist who was proud of taking each business he ran to new heights. Many Stephen A. and Ethel L. Keller Funds were created by him using the same thoughtful and strategic approach to his philanthropy as with his businesses. The Funds promote the arts, provide family services and assist in the leadership work of the Foundation.
COMMUNITY BUILDERS

KIWANIS CLUB OF FORT LAUDERDALE
Since 1923, members of Kiwanis Club of Fort Lauderdale have led efforts to improve the lives of those living in our community. They established the Kiwanis Club of Fort Lauderdale Charitable Fund and Kiwanis Club of Fort Lauderdale Scholarship Fund to support youth in need, affordable housing, civic well-being and education.

ELAINE AND JON KRUPNICK
Elaine, an accomplished artist, spent her early years as an RN and an Assistant State Attorney. Jon founded a highly successful civil trial law firm. They are growing their support for cultural initiatives and at-risk children through the Krupnick Family Fund and Elaine Krupnick Fund for the Arts. They blaze new trails through their philanthropy, while bringing out the best in others – and Broward.

MARY MACKENZIE
Founder of the multinational clothing empire Motherhood Maternity, Mary was born in Cairo, Egypt, and built her business in California. She chose South Florida as her residence and home to her charitable legacy through the Mary and Alex Mackenzie Community Impact Fund.

EVERETT H. METCALF, JR.
A World War II veteran, Everett was always engaged in the community, serving as a yacht club commodore and leader of civic clubs and charities. The Everett H. Metcalf, Jr. Unrestricted Fund has a significant impact on many of Broward’s biggest issues. It was his way to take care of the community that had given him so much.

ROSE MINIACI
Rose’s support of music, dance and theatre programs in Broward is remarkable. Her love of the arts and compassion for others guided her to establish the Rose Miniaci Family Fund in support of arts and educational opportunities for children.

JIM AND JAN MORAN
From humble beginnings in Chicago, automotive pioneer Jim Moran founded JM Family Enterprises, the world’s largest distributor of Toyota cars. Jim and Jan Moran’s family of Funds provide help for Broward’s at-risk youth, community health, education and family services. Their Funds enable them to make a real difference on issues that matter in Broward.

MARY N. PORTER
Mary’s philanthropic spirit was evident from a young age when she delivered food to needy families during the Depression. For more than a decade, Mary worked with the Foundation to maximize the impact of her giving. Her estate plan created four Mary N. Porter Funds to ensure the Porter name will forever nourish this community with a $43 million gift.

JOHN H. RAU
When John was a child, the science fiction of space flight captured his imagination. A successful stock investor, John’s passion for space exploration found expression through the John H. Rau Space Education Fund. His Fund now supports NASA space camps and other programs that inspire people to learn about the universe.
**GLORIA AND ALVIN ROSS**
Alvin served his country in World War II. He returned to his hometown in New Jersey where he and his wife, Gloria, built a successful modular home business and raised four children. They created the **Alvin and Gloria Ross Community Care Fund** to support caregivers who improve the lives of individuals with dementia.

**LOUISE B. AND JOSEPH S. RUMBAUGH**
Joseph believed that the arts were a catalyst to a more creative community. His dream to light the creative spark in children and adults was accomplished in 1999 when he established the **Joseph S. and Louise B. Rumbaugh Fund** to support deserving programs that ignite creativity throughout Broward.

**CAROLE AND STEVE SCOTT**
In 1957, Steve Scott’s family established one of the nation’s first Datsun/Nissan dealerships. After Steve sold the business, he and his wife Carole turned to the Foundation to create the **Scott Family Fund** to help Broward thrive now and into the future.

**FRANCIS A. AND ADELINE M. SINES**
Del and Francis traveled the world believing their adventures helped them understand the needs of others. To honor Francis when he passed, the **Francis A. and Adeline M. Sines Memorial Fund** was opened by Del. She religiously attended the Foundation’s education events and relied on its staff to help her support causes that reflected her values.

**HELEN WYATT RUST STOYKOV**
Helen wanted her legacy to honor her husband’s memory while investing in her life’s passions. The **Helen and Frank Stoykov Charitable Endowment Fund** now invests in music, art and animal welfare.

**ELAINE AND DR. ERWIN M. VASQUEZ**
As hands-on philanthropists, the Vasquez family is committed to helping the elderly receive better medical and social services. They support innovative programs that help older residents through the **Elaine and Erwin M. Vasquez, M.D. Family Foundation Fund**.

**MAY JEAN AND LOU WOLFF**
Lou designed the landmark Kenann building (now Citibank) in Fort Lauderdale. Lou and his wife May Jean’s combined sense of community responsibility compelled them to establish the **Lou and May Jean Wolff Family Foundation Fund** to help people become self-sufficient so they can, in turn, give back to others.

**ANONYMOUS (2)**
Two philanthropists have created Funds to support Broward’s growing and changing needs. The Foundation honors their requests to remain anonymous.
LEGACY SOCIETY

BOLD forward-thinkers who will define Broward’s future through their estate gifts to the Foundation

Suzanne Y. and Edward R. Allen
Jeannette Archer-Simons and Robert E. Simons
Carla and Giorgio Arra
William W. E. Ash III
Ann M. Bederman
Muriel B. Biskup
David C. Bland
Lisa A. Bonk
Richard A. Bray
Rod Breene
Nancy L. Brown
Anita and Ralph M. Byer
Cindy and Jim Caird
Melanie M. Camp
Linda B. and R. Michael Carter
Rita and Rick Case
Barbara R. Castell
Bonnie and Jim Collins
Carol Cooper
Frank Crawford
Jan C. Crocker
Jan R. and James A. Cummings
Carolyn Davis and Ned Black
Cathy and James Donnelly
Maggie and Jim Dunn
Susanne and Marty Ellman
Doris D. Emmett
Lorraine and Gerry Farmer
Lawrence “Larry” S. Feuer
Donna Fisher-Williams
Louis and Janine Flematti
Elisa R. and Barry H. Goldman
Mitchell E. Grant
Barbara T. Gray
Wilson B. and Susan Greaton
Barbara and Arnold Grevior
Madelaine and Steven J. Halmos
Ed Hashek and John Jors
Richard Helligas
Frank and Roberta Helsom
Ronald Herron
William Victor Higdon
Jane N. Huston
Paige and Steve Hyatt
Lesley Mitchell Jones
Emerson W. Kanode
Cindy and Laurence M. Kashdin
Brigitte Kimmich
Victoria C. Kirby
Walter W. Krueger
David B. Kyner
Lynn and James B. LaBate
Marcy Lambert
Christine L. and Arthur W. Lambertus
Robert Lichtenstein
Thomas H. Lindsey
Beth E. Linzner
Gabriele E. Magdanz
MP and James Malone
Patricia Martinez
Virginia M. McCormick
James D. McKenzie
Jo Ann K. and Donald B. Medalie
Greg Medalie
Daryl G. Miller
Virginia I. and Thomas J. Miller
Jan Moran
Kent and Carolyn Morgan
Jacqueline Niehaus
Nanette and Mark Olson
Dorothy M. Osterhoudt
Pat Owen
Susan Nolan Palmer
Sarah and Scott Parker
Ann S. and Robert O. Powell
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Nancy and Dave Reierson
Sally J. Robbins
Hugh E. Root
Charles L. Ross
Gloria Ross
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John D. Ryan
Franklin R. Schmidt
Steve and Carole Scott
Grace Dudleck Shepherd
Patricia A. Shub
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Fred G. Smith
Hilda and Theodor M. Sokolowski
William C. Spencer
J.R. Steele
Sandy and Kenny Tate
Sondra R. Title
Ben and Barbara Tobias
Gregory D. Unwin Moore
Melba Urbanek
Paola Valentine
Elaine Vasquez
Charles L. Verner
Janice Weintraub and Irwin Weideger
Dixie E. Wheeler
June Wise
May Jean and Lou Wolff
Kurt Zimmerman
Anonymous (38)

Legacy Society member Walter Krueger tries on the gold medal won by blind U.S. Paralympic Swimmer and Navy veteran Brad Snyder, who spoke at a recent Foundation event.

As of February 28, 2019
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The Community Foundation of Broward knows and understands our community’s needs. With the Foundation as a partner, my clients have access to philanthropic experts who help them build a personalized giving strategy around their individual goals and passions. This means my clients have peace of mind knowing their charitable dollars will create a much greater impact on the issues they care about most.

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Tripp Scott Attorneys at Law

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Zimmerman & Associates, P.A.
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(Top Left) Gary L. Rudolf, Esq. and Marie C. Hansen, TO. (Top Right) Marianela Collado, CPA/PFS, CFP® and James B. Davis, Esq. (Bottom Left) Professional Advisors Council Chairman Kurt D. Zimmerman, Esq. and former Chairman Louis C. Anderson, Esq. (Bottom Right) William A. Snyder, Esq.
2019 BOARD OF DIRECTORS

A distinguished group of executives and community leaders who drive the Foundation to create BOLD impact


STEVEN W. HUDSON, Chairman

is president of Hudson Capital Group and a Broward County native. He is past chairman and longtime board member of the Humane Society of Broward County and serves on the executive committees of Broward Workshop and the Broward Business Council on Homelessness. He graduated from Southern Methodist University in Dallas, Texas with a Bachelor of Science degree in Business Economics.

JAMES DONNELLY, Vice Chairman

is founder and CEO of the Castle Group. He is a CPA, entrepreneur and philanthropist. He is co-chairman of the Broward Business Council on Homelessness, immediate past chair of the Broward Workshop and sits on the LeMieux Center for Public Policy board of advisors. James is a NSU Huizenga School of Business Hall of Fame member, past chair of the Florida Young Presidents’ Organization and South Florida Business Journal “Ultimate CEO.”

CYNTHIA BORDERS-BYRD, Treasurer

is managing member of C. Borders-Byrd, CPA LLC, with over 32 years of experience providing external audit services. Cynthia served on FICPA’s executive committee and as chair of the Florida Board of Accountancy. She is a past board chair of Junior Achievement of South Florida and past treasurer of Delta Sigma Theta Sorority. She is currently serving as president of the Fort Lauderdale Chapter of the Links, Incorporated and as chair of the Board of Accountancy Probable Cause Panel.

JULIET MURPHY ROULHAC, Secretary

is the regional manager for Corporate External Affairs for Florida Power & Light Company and an attorney with over 25 years of experience. She previously worked within the General Counsel offices of both the CIGNA and Prudential Property and Casualty Insurance Companies. Juliet currently serves as chair of the board for the Greater Fort Lauderdale Chamber of Commerce, and a board member of the Broward Workshop, Greater Fort Lauderdale Alliance, Museum of Discovery and Science and Baptist Hospital BOH/BHE.
2019 BOARD OF DIRECTORS

PAIGE HYATT, At Large is an engaged community leader in Broward County. Her volunteer leadership roles include Friends of Jack & Jill Children’s Center, Florida House, University of Miami’s Forum on Women’s Health, PAWS, Lauderdale Debutante Presentation Committee, Memorial Hospital’s Pink Angels, and Fort Lauderdale Alumnae Panhellenic. She has been an ambassador of the Foundation since its inception, supporting operational efforts and special interest fundraising.

KURT D. ZIMMERMAN, At Large has practiced law for over 28 years in the area of trusts and estates. He serves on the governing boards of the Broward Performing Arts Foundation and the YMCA of South Florida. Kurt is a graduate of the University of Michigan where he was a First-Team Academic All-Big Ten athlete. He received his law degree from Vanderbilt.

J. DAVID ARMSTRONG, JR. is President Emeritus of Broward College, following an 11-year tenure as the school’s President. He is currently co-chair for the Greater Fort Lauderdale Alliance Six Pillars Economic Program and serves on the Board of Directors for the Broward Workshop, where he co-chairs its Technology Committee. He is involved in homeless initiatives and was recently appointed to the Broward County Commission’s Continuum of Care Advisory Committee. Prior to his work with Broward College, Armstrong was the Chancellor of the Florida Community College System.

DORIA M. CAMARAZA is senior vice president/general manager for the American Express Company. She has been named an “Ultimate CEO” and one of the top 25 Most Influential Women in Business by the South Florida Business Journal. Doria is a board member and past chair of The Urban League of Broward County and a Broward Workshop board member.

JAMES B. DAVIS is a shareholder at Gunster and Tax Practice group co-chair. He focuses on estate planning, employee benefits and entity taxation. Jim is rated Band 1 in Chambers USA and is an AV Preeminent Rated attorney in Martindale-Hubble. He serves as an adjunct professor at the University of Miami Law School in the LLM Estate Planning curriculum.

LOUISE F. DILL is a retired bank executive with extensive sales and marketing experience in private wealth management. She has served on the boards of numerous organizations, including the NSU Art Museum and Broward Center for the Performing Arts Foundation. She currently is a board member of the Bonnet House Museum and Gardens and Funding Arts Broward. Louise provides sales and marketing consulting services to the nonprofit and for-profit sectors.

EDWARD T. HASHEK has more than 40 years of IT experience in the financial technology service industry. He has been active in community boards in Milwaukee and Fort Lauderdale, currently serves on the boards of Island City Stage, Funding Arts Broward (FAB) and the Galt Mile Community Association.

ALICE LUCIA JACKSON recently completed a 36 year career in commercial real estate where she was recognized as a Woman of Influence. Her recognitions include the 2017 Lifetime Achievement Award by her business peers, 2017 Magnolia United Way Leadership Award, 2009 Office Broker of the Year and Power Broker from 2006-2015. She is a Leadership Broward graduate, a United Way Tocqueville Society member and serves on the national advisory board for the Breast Cancer Research Foundation.

BACARDI L. JACKSON is the Senior Supervising Attorney for Children’s Rights for the State of Florida and Managing Attorney of the Miami Office for the Southern Poverty Law Center. The priority areas of the children’s rights practice group are: stopping the school-to-prison pipeline, ensuring equal access to education for children in poverty and those with disabilities, and ensuring access to mental health services. She also serves on the boards of the Broward College Foundation and Women in Distress.

ANNE K. JOYNER formerly served as the agency coordinator of Cities in Schools and co-owned a meeting and convention planning service. Anne has served on the boards of Stranahan House, Broward Outreach, Greater Fort Lauderdale Film Festival, Junior League of Greater Fort Lauderdale, Jack & Jill Children’s Center and the University of Miami’s Forum on Women’s Health.

MICHAEL G. LANDRY has been involved in the asset management business since 1972. He owns Landry Trebbi Investment Corp., which holds
The Pillars Hotel in Fort Lauderdale, an internationally-renowned boutique luxury hotel. He is on the boards of the Broward Center for the Performing Arts, Broward Workshop and Jack & Jill.

**JARETT S. LEVAN** is president of BBX Capital Corporation, a diversified holding company, and a member of the board of directors of BBX Capital and Bluegreen Vacations. Jarett serves on the boards of Broward Performing Arts Foundation, Broward Workshop, Greater Fort Lauderdale Alliance, the Ambassadors Board of Nova Southeastern University, and Business for the Arts of Broward, and is an active member of the Miami Chapter of Young Presidents’ Organization.

**PEGGY HOGAN MARKER** is a partner and president of Marker Construction Group. She is also partner in a family owned commercial and residential development company based in New York, and was previously Senior Vice President & Director of Development for an advertising agency. She is involved with the Humane Society of Broward County, PAWS, Save the Children, the Fire House Museum and 4Kids.

**CORI FLAM MELTZER** is an attorney, a Florida Supreme Court certified mediator, and the principal of CFM Mediation. She is a frequent lecturer on mediation and negotiation strategies as well as how women can be more effective negotiators. She co-created “Make Like a Magnet,” a business development workshop for women attorneys. Cori is a co-founder and vice chair of the board of City Year Miami, a member of Leadership Florida Class XXXII, and a graduate of the Presidential Leadership Scholars Program.

**DEV MOTWANI** serves as president of Merrimac Ventures and is founder and managing partner of Chieftain Residential. Prior to his current roles Dev worked at Credit Suisse in New York City. He has worked in the White House and on the 2000 Gore/Lieberman Presidential Campaign. He is involved with the Broward Center for the Performing Arts Foundation, Broward College Foundation, Orange Bowl Host Committee, Broward Workshop and the Crockett Foundation.

**THOMAS R. OLIVERI** is senior market executive, Broward County of The Northern Trust Company. He is responsible for a team of professionals who serve high net worth clients and families with comprehensive wealth management services incorporating investment management, trust, and banking. Tom is a board member of the Florida Community Health Network, Memorial Foundation and Joe DiMaggio Children’s Hospital Foundation, Broward Center of the Performing Arts and Broward Workshop.

**RAMON A. RODRIGUEZ** is retired chairman of the board of directors of Republic Services, Inc. He was president and CEO of Madsen Sapp Mena Rodriguez & Co. and a founder of DME Corporation. Ray presently serves on the boards of PBS and of Baptist Health Medical Group. He is past chairman of the Florida Board of Accountancy and past president of the Florida Institute of Certified Public Accountants.

**KIM SWEERS** is managing partner of FB Marine Group. She currently sits on various community boards and is an active member of the Broward Workshop, Fort Lauderdale Chamber of Commerce, Moffitt Cancer Center, Marine Retailers Association of America, the Marine Industries Association of South Florida and Florida Yacht Brokers Association.
PAST BOARD OF DIRECTORS

Suzanne Y. Allen
W. George Allen
Bob Avian
Elliot B. Barnett*
Richard A. Berkowitz
Francie Bishop Good
Gary E. Bitner
James J. Blosser
Nancy W. Blosser
Holly Bodenweber
Francis B. Brogan, Jr.
Anthony Brunson
Gale M. Butler
Rita Case
Barbara R. Castell
Margarita T. Castellon
D. Keith Cobb
Joan K. Crain
Jan C. Crocker
Jan R. Cummings
Ward J. Curtis Jr.*
Shaun M. Davis
Elizabeth C. Deinhardt*
John B. Deinhardt*
Louise F. Dill
Patricia Du Mont
Katherine M. Eggleston
Richard L. Engberg
Leonard L. Farber*
Bernardo B. Fernandez Jr.
George E. Gadson
Linda L. Gill
Daniel E. Gordon
Wilson B. Greaton Jr.
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Barbara Grevisor
William Gundlach
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Frank E. Helsom
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Joseph E. Jack*

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Janet C. Jordan
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Thomas O. Katz
Patricia R. Kearns
Stewart R. Kester Sr.*
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Christine L. Lambertus
Raymond H. Leightman
Armando Leighton, Jr.*
Susie Levan
Alan J. Levy
Marsha O. Levy
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Jack R. Loving
Anne B. MacLean
Patricia L. Mahaney
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H. Kent Mergler
Virginia I. Miller
Frederick V. Miller*
Joseph R. Millsaps*
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John Offerdahl
A. Gordon Oliver*
Stacy Ostrau
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Arlene Pecora
David E. Ratcliffe
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Mary Riedel
Leonard Robbins*
Sally J. Robbins
Roy L. Rogers
Jacquelyn Rogow

Barbara Roti
John W. Ruffin Jr.
Maria T. Sanjuan
Tony Segreto
William L. Shillington
Christopher L. Smith
William A. Snyder
Raymond C. Southern
George E. Sullivan
William F. Sullivan
Paul C. Tanner
J. Kenneth Tate
Judith M. Thiel
Norman D. Tripp
Leslie C. Tworoger
Jose B. Valle
Elaine Vasquez
Douglas J. Von Allmen
John M. Walsh
Steven H. Woods

*deceased
As of December 31, 2018

(Top Left) Beatriz Miniacci and Former Board Member Albert Miniacci; (Top Right) Former Board Members Janet Jordan and Stacy Osrau; (Bottom Left) Former Board Member Frank Brogan and Community Foundation President/CEO Linda Carter; (Bottom Right) Former Board Members Margarita T. Castellon and Maj. General James W. Monroe.
FOUNDATION STAFF

Highly-skilled experts with deep community knowledge who turn BOLD philanthropy into real results


Seated (L-R): Angelica Rosas, Carol Dorko, Linda Carter, Nancy Thies, Nancy Walton.

LINDA CARTER, President/CEO

has led the Foundation since 1997. She has served as president of the Community Foundations of Florida, the Planned Giving Council and the Association of Fundraising Professionals. Linda serves as a board member of the Broward Workshop, Florida House, Funding Arts Broward and is a member of the Sun Sentinel South Florida 100. Linda is a Broward native and a graduate of the University of Florida.

SHERI BROWN, Vice President of Grants & Initiatives

has served the Foundation for over 17 years and is a member of the South Florida Advisory Council of the Florida Philanthropic Network, Broward Workshop’s Education & Youth Advocacy Committee and Grantmakers in Education. Her community involvement includes service to The Links, Incorporated and Delta Sigma Theta Sorority, Inc. A Broward native, Sheri is a graduate of Florida A&M University.

CAROL DORKO, JD, Chief Financial Officer/Chief Operating Officer

has more than 27 years of progressive experience in the areas of accounting, finance, human resources, IT and operations in both the public and private sectors. She is a member of the Council on Foundations Financial and Administrative Officer Group and an alumnus of the University of Pittsburgh and Duquesne University School of Law.
FOUNDATION STAFF

KIRK ENGLEHARDT, Vice President of Marketing & Communications has more than 25 years of communications experience. He grew up in Broward County and holds a master’s degree from Florida Atlantic University and a bachelor’s degree from Florida State University. Kirk led award-winning communications teams at Georgia Tech, the Georgia Department of Education and Broward County Public Schools.

NANCY THIES, Vice President of Philanthropic Services has more than 30 years of experience in philanthropy and has held leadership positions with Holy Cross Hospital, United Way of Broward County and Miller Brewing Company. Nancy is a member of United Way’s Tocqueville Society and serves on the boards of Friends of Birch State Park and the Planned Giving Council of Broward. She is a graduate of the University of Wisconsin-Madison.

ANNETTE BAUER, CPA, SPHR, Finance Manager has more than 20 years of experience in accounting and human resources in both the public and private sectors. Annette has served on the local Juvenile Diabetes Research Foundation board, as treasurer at Saint Gregory the Great Catholic School and volunteered with Girl Scouts of America. She is a graduate of Florida Atlantic University.

ANDREA GREGORY, Office Assistant has more than eight years of experience in administration in the public and private sectors. Prior to joining the Foundation in 2014, Andrea worked for the Department of Children and Families, with the Department of Labor and the Challenger Learning Center.

AMANDA KAH, Charitable Funds Manager has worked at Donors Forum of South Florida as its communications and member services manager. She obtained a B.A. in International Relations from Claremont McKenna College and a M.A. in International Affairs from George Washington University.

JUSTINE MORGAN, Charitable Funds Director has a background in finance and development in the private and nonprofit sectors. Prior to joining the Foundation in 2016, she served as donor relations manager at Equine-Assisted Therapies of South Florida. Justine is a member of the Association of Fundraising Professionals. A Broward native, she graduated from Florida Atlantic University.

JENNIFER POWERS, Philanthropic Services Manager has two decades of experience in philanthropy, retail management and community involvement. She has previously worked in development at Davidson College and the University of North Carolina at Charlotte and holds a bachelor’s degree in History from the University of North Carolina at Charlotte.

ANDREW REID, Lead Writer and Content Manager has more than 20 years of communications experience. He is a former editorial writer and reporter for the South Florida Sun Sentinel who specialized in writing about government, growth and development and environmental issues. Andrew has also worked at the Tampa Tribune, Stuart News and the Winter Haven News Chief. He has a bachelor’s degree in communication from Florida State University.

DAVID RATCLIFFE, Philanthropic Services Executive has more than 35 years of experience in the financial services industry and most recently served as Managing Director and National Philanthropic Manager for U.S. Trust. He holds the Certified Trust and Financial Advisor and Chartered Advisor in Philanthropy professional designations and earned his BA degree from Wake Forest University.

ANGELICA ROSAS, Grants Manager is the grantmaking lead for the Foundation’s Issues that Matter and has more than ten years of fundraising and development experience with local nonprofit agencies. Prior to joining the Foundation, she worked at the Sun Sentinel Children’s Fund. Angelica is a graduate of St. Thomas University.

NANCY WALTON, Office Manager has more than 30 years of office management experience across the country. She is active in the animal rights movement and volunteers with Japanese Chin Care and Rescue, Inc. Nancy has an associate’s degree from Robert Morris University.
OUR SIX-POINT PROMISE TO YOU

- **YOUR FUND. YOUR VALUES.** The Foundation ensures we know who you are and the legacy you want to leave. This personal relationship coupled with your tailor-made Fund for Broward will empower your philanthropy to new heights for the greatest possible impact on Broward.

- **ENJOY YOUR GIVING.** Focus exclusively on making a difference on the issues that matter while our full-service team handles the accounting, IRS compliance, financials and administration of your Fund.

- **YOUR PHILANTHROPY CONCIERGE.** As a hands-on philanthropy partner, your Charitable Funds Manager is your go-to person to learn about the newest and most innovative ways to make a difference, research the organizations you give to and ensure your support delivers the results you expect.

- **SEE YOUR IMPACT.** Witness firsthand the difference your Fund is making for Broward as you visit the organizations and people benefiting from your support, review your annual Fund Snapshot or read our award-winning Community Matters magazine (with your exclusive subscription.)

- **YOU’RE IN THE KNOW.** Stay up to date with your Fund’s financials 24/7 via access to PhilNet, our secure online Fund management tool, and with your Quarterly Fund Statement.

- **YOU STAY CONNECTED.** Your Fund for Broward will introduce and connect you to like-minded philanthropists when you attend our inspiring and educational events. You’ll join us as we take a behind-the-scenes look at the big issues facing our community and the difference your philanthropy makes.
FINANCIALS
As of June 30, 2018

TOTAL ASSETS
$197,032,652

ANNUAL GRANTS
$11,844,060

INVESTMENT RETURNS
- Community Foundation of Broward
- 60% MSCI AC World/
  40% Barclays Capital Aggregate

FINANCIAL OVERVIEW
As the size and scope of the Foundation has grown, so has
the sophistication of our financial systems and internal
controls. Clear responsibilities, independent decision
making and separation of duties are some of the key parts
that make the Foundation an outstanding fiduciary.

THE INVESTMENT CONSULTANT monitors
each investment manager firm’s performance relative to
their benchmark and peer universe. If returns are outside
acceptable levels or structural change, such as manager
turnover or if style drift occurs, a comprehensive review
is triggered. Without confidence in a stronger future
performance, the investment consultant suggests a
replacement investment manager.

THE INDEPENDENT INVESTMENT
COMMITTEE comprised of highly experienced business
and financial leaders from the community, undertake
quarterly performance reviews to monitor the portfolio and
report back to our Board of Directors.

THE BOARD OF DIRECTORS is a fiduciary and
approves and monitors the operational and grant budgets
of the Foundation through monthly financial reports. The
Board has complete oversight of the management of
investments.

THE FOUNDATION STAFF provides
comprehensive, accurate and timely back-office support.
All investment activity including income, expense,
realized and unrealized gain activity is allocated on a Fund
level basis. All investment statements are compared
to reports prepared by the investment consultant, and
monthly financial reports are provided to the Board of
Directors.

THE AUDIT COMMITTEE reviews the Foundation’s
systems of internal controls regarding finance, accounting
and legal compliance. Again this year, the auditors
reported the Foundation has outstanding internal controls
and financial practices.
Our operating expenses are consistently less than 2% of our total assets, which garners high marks in our field.

Condensed Statement of Financial Position
June 30, 2018

<table>
<thead>
<tr>
<th>ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$273,390</td>
</tr>
<tr>
<td>Investments</td>
<td>188,168,748</td>
</tr>
<tr>
<td>Bequests receivable</td>
<td>800,000</td>
</tr>
<tr>
<td>Pledges receivable, net</td>
<td>4,859,224</td>
</tr>
<tr>
<td>Assets under split interest agreements</td>
<td>1,749,569</td>
</tr>
<tr>
<td>Prepaid expenses and other assets</td>
<td>432,436</td>
</tr>
<tr>
<td>Other real estate</td>
<td>500,000</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>249,295</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$197,032,652</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$202,535</td>
</tr>
<tr>
<td>Grants payable</td>
<td>1,630,141</td>
</tr>
<tr>
<td>Deferred revenue and liabilities under split-interest agreements</td>
<td>933,334</td>
</tr>
<tr>
<td>Agency transaction payable</td>
<td>16,767,537</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>19,533,547</strong></td>
</tr>
</tbody>
</table>

| NET ASSETS                       | 177,499,105   |
| **TOTAL LIABILITIES AND NET ASSETS** | **$197,032,652** |

Condensed Statement of Activities and Changes in Net Assets
12 Months Ended June 30, 2018

<table>
<thead>
<tr>
<th>REVENUE AND SUPPORT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and bequests</td>
<td>$20,626,571</td>
</tr>
<tr>
<td>Net investment income</td>
<td>11,065,772</td>
</tr>
<tr>
<td>Other revenue</td>
<td>115,273</td>
</tr>
<tr>
<td><strong>Total Revenue and Support</strong></td>
<td><strong>31,807,616</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and programs</td>
<td>12,332,133</td>
</tr>
<tr>
<td>Administrative</td>
<td>891,766</td>
</tr>
<tr>
<td>Donor development</td>
<td>696,600</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>13,920,499</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of year - July 1, 2017</td>
<td>159,611,988</td>
</tr>
<tr>
<td><strong>End of year - June 30, 2018</strong></td>
<td><strong>$177,499,105</strong></td>
</tr>
</tbody>
</table>

A complete set of financial statements with accompanying footnotes and unmodified auditor’s report issued by Keefe, McCullough & Co., LLP, as well as IRS Form 990, are available for review at the Community Foundation of Broward office and on our website at cfbroward.org/financials
MISSION
The mission of the Community Foundation of Broward is to provide leadership on community solutions, and foster philanthropy that connects people who care with causes that matter.

VISION
We envision a community where people feel connected and are actively engaged to make Broward better.

VALUES
The Community Foundation must:
• Lead boldly
• Bring out the best
• Unite the community
Build Endowment

Create Opportunity

Provide Leadership

Define the Future
We were the first community foundation in Florida and remain among an elite group of community foundations nationwide to be confirmed in compliance with the National Standards for U.S. Community Foundations.

Publication Date: March 2019

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