



COMMUNITY
FOUNDATION
of South Alabama

giving today. growing tomorrow.
2017 ANNUAL REPORT



OUR COMMITMENT

We are **committed** to acting with **integrity** with all of our partners, and to being **equitable, inclusive** and **transparent** in everything we do.

We are **passionate** about developing long-term **relationships** based on mutual **respect** and **trust** in order to create measurable impact in our communities. We are committed to helping southwest Alabama become a more **prosperous** community where all of its residents enjoy a great quality of life.

VETERANS INITIATIVE

Veterans have served us. It is our turn to serve them.

There are nearly 60,000 veterans in our eight-county region. The number is anticipated to rise as enlistment rates of people from southern states have increased. Transitioning back into civilian life is hard for many veterans returning home. They face a variety of needs, including job training, employment, health (physical and mental), housing assistance and education. The Community Foundation's Veterans Initiative is a commitment to identify and address the most pressing needs of our local veterans and their families.

We took the first step and conducted the *Southwest Alabama Veterans Needs Assessment* to identify the primary objectives for the competitive grant cycle. As a result of these findings and the recommendation of our Veteran Advisory Committee, our areas of focus are improving awareness of available services, addressing the underlying causes of substance abuse, providing therapy of mental health issues and offering treatment for substance abuse.

The grants awarded to local nonprofits will provide direction and treatment to bolster the lives of these heroes who live among us.



Pictured: Hannah Clayton, Jeremy Fletcher, Josh Moore, John Kilpatrick

ATMORE COMMUNITY FOUNDATION

Small Town Decision Creates a Big Impact

Local leaders know community needs. With the creation of an affiliate fund at the Community Foundation, leaders may join together to make a lasting impact on their community.

Affiliates can focus on raising funds and deciding charitable use for the income of the community fund while relying on the parent Community Foundation to handle the administration, investment and required daily tasks.

In Atmore, the common saying is "Old friendships. New Beginnings." The citizens of Atmore saw a new beginning with the establishment of the Atmore Community Foundation in April 2017. As an affiliate of the Community Foundation, it was created by a group of local leaders to create a lasting impact on the special place they call home. "Atmore has not had a vehicle for residents and former Atmoreans to give back to the heart of the community," long-time resident Dale Ash said. "The town has been a blessing to so many and even those who have left our little town recognize that their strong roots started here."

Since the affiliate was established, the newly-formed Advisory Committee has dedicated its time and energy to fundraise for future grant-making efforts. Establishing an affiliate required the committee to raise an initial \$25,000 to create an endowment to benefit Atmore in perpetuity. Committee members exceeded their expectations, raising over \$70,000 in a few months. The advisory committee makes recommendations about how the charitable dollars are spent, and the Community Foundation bears the legal responsibility to ensure that the funds are then used in compliance with donor intent. This joint collaboration will ensure that the Atmore Community Foundation is successful in its attempt to bring new life to the small town.





LET'S PLAY BALL

Forming a Team to Promote a Healthy Community

The Community Foundation is teaming up with the Aspen Institute, the Jake Peavy Foundation, and the Caring Foundation of Blue Cross Blue Shield of Alabama on Project Play, an opportunity to reimagine sports with health and inclusion as core values.

At its annual summit in Washington, D.C., the Aspen Institute announced that Mobile would be the focus of its next *State of Play Report*. The institute and local leaders are working together to conduct a regional assessment of the landscape of youth sports in the community. It will identify key findings known to get and keep kids active in sports and provide key recommendations for next steps and ideas for how individual stakeholders may plug in.

Low income children are being left on the sidelines and so are the opportunities to allow these children to play and become productive members of society. Project Play aims to level the playing field. It has the ability to reenergize South Alabama communities to be active and allow every child the opportunity to play.

Project Play was launched in 2013 by the Aspen Institute's Sports & Society Program. The initiative convenes the nation's top thought leaders from the realms of sports, medicine, media, business innovation, government and philanthropy to develop strategies that build healthy, thriving communities for all. "We are so excited to partner with The Community Foundation of South Alabama and the Aspen Institute to bring this incredible assessment of youth sports to my hometown, Mobile, Alabama," said Jake Peavy. "The value of sports goes beyond the field and we're committed to providing these young kids with the necessary access so they can thrive and be successful in life."

Pictured: Jake Peavy and Rebecca Byrne at the 2017 Project Play Summit in Washington, D.C



CLOSING THE OPPORTUNITY GAP

PHIL Talks

Created by the Foundation in 2016, PHIL Talks is a series featuring inspiring speakers who encourage philanthropy and positive change in our community. In April 2017, the Foundation welcomed Dr. Robert Putnam, the nationally renowned author of *Our Kids: An American Dream in Crisis* for a series of talks in Mobile and Baldwin County. Dr. Putnam's visit launched the Foundation's *Closing the Opportunity Gap Initiative* aimed at narrowing the opportunity gap for financially fragile families in our eight-county area.



DISTINGUISHED PHILANTHROPIST OF THE YEAR AWARD Giving from their Heart for their Home

Created in 2014 as a way to honor an individual or family who has demonstrated exceptional generosity, the Ann and Fred Delchamps Distinguished Philanthropist Award was presented to Hooper Matthews III, Cindy Matthews Colville and Dale Matthews Ash at the Community Foundation's Annual Luncheon. Since 1967 the Matthews Family has run the Pepsi-Cola Bottling Company of Atmore, during which time they have poured out their resources to lift up their home county.

Building on the legacy and example set forth by their parents, the Matthews siblings humbly accepted the award, "We are just small town people who try to do what we can to help wherever and whenever possible."

ANNUAL LUNCHEON A Celebration of Dr. E.O. Wilson, Iconic Figure for Conservation

The community came together to celebrate the influence of renowned biologist, Dr. E.O. Wilson, who has spent much of his career on the preservation of the Mobile-Tensaw River Delta. A panel discussion with author Roy Hoffman, conservationist Roberta Swann of the Mobile Bay National Estuarium and Fairhope doctor Lynn Yonge, a devotee to the study and utilization of the Delta, shined a light on Wilson's work, writing and philosophy. Mayor Sandy Stimpson presented a key to the City of Mobile to Wilson as a reminder that he is always welcome to return to his childhood home and as a token of appreciation for what his work has meant to the quality of life that we enjoy on the Gulf Coast.





WOMEN'S FORUM

Empowering Women in Every
Generation from All Walks of Life

The 2017 Women's Forum, co-hosted by Congressman Bradley Byrne and the Community Foundation, had the largest attendance to date with over 500 participants. The theme was Empowering Today's Woman and featured keynote speaker Juanita D. Duggan, native of Mobile and President / CEO of the National Association of Independent Business. Local community leaders Stephanie Bryan, Tribal Chair of the Poarch Band of Creek Indians; Ashley Bonner, attorney and stay-at-home mother; Judge Rosemary Chambers, Circuit Judge; and Dr. Monica Motley, President of the Alabama School of Math and Science, participated in a panel discussion. Lynne Chronister, Vice President of Research and Economic Development for the University of South Alabama, served as the moderator.

BEACON AWARD

Excelling in Engineering
and Philanthropy

In November 2016, the Community Foundation of South Alabama named Thompson Holdings, Inc. as the honored recipient of the Beacon Award. Each year, in recognition of Community Foundation Week, the Community Foundation presents this award to a business or corporation that embodies the spirit of philanthropy. Like the Middle Bay Lighthouse, Thompson Engineering is a source of light and inspiration for the growth and progress of the community. Since the Thompson Holdings Foundation Fund was founded in 2004, the company has awarded more than \$600,000 to charitable organizations, leaving a lasting impact on the community.





FROM THE CHAIR AND PRESIDENT

The Community Foundation serves you and every citizen in southwest Alabama.

Every day we work with you to lift up the underserved, sustain the arts and health services, preserve our natural resources, and provide opportunities for every child to achieve the American Dream.

Just as a tree adds another growth ring with each passing year, we welcome more of you to our circle of donors every year. Our community is “giving today, growing tomorrow.”

Donors come to the Community Foundation and establish funds that support non-profits, students, churches and municipalities throughout the eight counties of our region. Through wise investment, the Community Foundation amplifies the impact of the collective philanthropy of individuals, families, businesses, and organizations. Through services that we provide, administrative burdens are lessened. Donors are unencumbered to enjoy the benefits and joy that come with giving.

As individuals, we yearn to be a part of something bigger than ourselves. Something special happens when we work together toward a common goal of creating a prosperous life for all.

Lives are changed. Communities are strengthened.

We are committed to working with you in a spirit of collaboration. Thank you for your generosity of time and resources.

Bob Higgins
Chair, Board of Directors

Rebecca Byrne
President & CEO

CHARITABLE FUNDS

NEW FUNDS

Covan Charitable Fund
Episcopal Seminarian Educational Fund for the Central Gulf Coast
Saunders Yachtworks Foundation Fund
Crampton Trust 2016 Fund
The Greg and Donna Dorriety Fund
O'Connor Family Fund
McNair Family Charitable Fund
Mobile Greenway Fund
Camp Seale Harris Endowment Fund
Will R. Blackburn Philanthropic Fund
Atmore Community Fund
Alto Fund
Friends of Education Fund

AFFILIATE

Atmore Community Foundation

AGENCY

Ahavas Chesed Synagogue Funds
Alabama Coastal Foundation Endowment
Alabama Eye Bank Endowment Fund
Alabama Lighthouse Association Fund
Alabama School of Math & Science Endowment
Alabama Society Sons of the American Revolution Fund
The Alabama State Veterans Memorial Cemetery at Spanish Fort Foundation Funds
America's Jr. Miss Scholarship Endowment
Bishop State Community College Alumni DVP Fund
Beth Zur/ B'nai B'rith Fund
Boys and Girls Club of South Alabama, Inc. Wilson Endowment Fund
Camp RapAHope Endowment Fund
Catholic Social Services Fund
Child Advocacy Center Endowment Fund
Child Care Resources for South AL Fund
Child Day Care II Endowment Fund
Clarke County Museum Memorial Trust Endowment Fund
DISLF Fund
Drug Education Council Endowment Fund
Exchange Club Family Center
Fairhope Educational Enrichment Foundation Endowment Funds
Deep South Girl Scout Council Fund
Goodwill Easter Seals of the Gulf Coast
Grove Hill's Burge-Mathews Cemetery Association, Inc. Endowment Fund
Robert V. Jacobs Endowment Fund
Jewish Family Services of Mobile Endowment
Mobile AIDS Support Services Foundation
Mobile Ballet, Inc. Fund
Mobile Bar Association Foundation Endowment Fund
Mobile Baykeeper Endowment Fund
MCS Capital Fund Foundation
Mobile County Board of Health Fund
Mobile Public Library Endowment Fund
Montrose Cemetery Association Foundation
Mulherin General Endowment Fund
The Project Cate/Coastal Kids Quiz Fund
Senior Citizens Services Endowment
J S Sheldon Endowment
Gordon Smith Center Inc. Fund
Spanish Fort Education Enrichment Foundation
St. Paul's Episcopal School Endowment
Turtle Point Environmental Science Center Foundation
U.S. Navy League - Mobile Council Sea Cadet Endowment Fund
Victory Health Partners Fund
Waterfront Rescue Mission Fund
YMCA of South Alabama, Inc.

DESIGNATED

Derak "Mantee" Agee Memorial Fund
Alabama Power Endowment United Way
Alabama VOAD Assistance Fund
Bendel Family Fund
Doris Bender Executive Development Fund
Lance Bodden Award Mobile Rotary Club
Boys & Girls Clubs Endowment
Leslie J. Bullen Fund for WRM
Venetia B. Butler Fund
The Cain Family Fund
Cambodian American Community Fund
Cardiac Therapy Inc. Endowment Fund
Child Advocacy Center Endowment
Clarke Co. Historical Society Endowment
Commonwealth National Bank Fund for the Future
The Compassionate Friends Community Fund
Brigadier General Edward Cooper & Edna Pincus Cooper Fund
Cottage Hill Foundation Fund
DISL Foundation George F Crozier Endowment Fund
Lamont and Marsyl Dees Green Space Fund
Lamont and Marsyl Dees Fund
Delchamps Incorporated Charitable Fund
Virginia Delchamps Fund
Disaster Relief Fund
Sara Sanford Dodd Fund
Allen Dudley/Travis Johnson Fund
Dumas Wesley Community Center Endowment Fund
Eastern Shore Art Assoc. Endowment
Elevator World Incorporated Charitable
Escambia Co. Hospital Endowment
Clara Jean Ester Restricted Fund
Noel E. Evans Fund
Fairhope Educational Enrichment Endowment
Alma & Anthony Fisher Concert Endowment Fund of the MCMS
DHRFoster Care Endowment
Reita P. Franco Jewish Film Festival of Mobile Endowment Fund
Gene Fussell Memorial Award Fund
L. Pritchett & W. Gamble Memorial Fund
Gulf Coast Child Care Foundation
Emily Staples Hearin Fund
Gladys and Arthur Hearn Philanthropic Funds
J. M. Hocklander Legal Memorial Fund
Walter N. & Maudine H. Ingram Fund
Trey/Dorothea Johnson Fund
Al and Molly Kahn Fund
Kaufman/TCF Newsletter
Kaufman-Dauphin Way United Methodist Fund
Ruth & Bill Kaufman Charitable Fund
Porter King Jr. Charitable Fund
Ray C. Kirkpatrick Fund
Lions/USA Eye Research Endowment
Lockwood Harless Endowment for WRM
The Mary Lyne Orange Beach Coastal Fund
Main Street Mobile Endowment
The Map for Mobile Fund
Jean F. & Julius E. Marx Fund
Harry & Lula M. McCarn Fund
Harry & Lula McCarn Retired Registered Nurses Fund
McDonald Education Fund
McGillToolen Foundation Fund
Mendenhall Charitable Fund
Dow Endowment For The Mobile Arts
Mobile Arts Council Endowment Fund
Mobile Assn for Retarded Citizens Endowment
Mobile Museum of Art Endowment
Dow Endowment for Mobile Opera
Mobile Opera Endowment Fund
Mobile Preschool for the Deaf, Inc. Fund for the Future

Mobile Public Library Capital Campaign
Mobile Symphony Endowment
Mobile United Endowment Fund
Most Pure Heart of Mary Fund
Mulherin Custodial Home Endowment
Multiple Sclerosis Fund
Hettie Hopkins "Tutta" Murchison Fund
Museum of Mobile Fund
Friends of Oakleigh Endowment Fund
One Hundred Black Men Fund
One Hundred Club Mobile County
Penelope House Endowment
Alvertha and Austin Penny Fund
Presbyterian Retirement Corp. Endowment
Project CATE Foundation, Inc. Fund
Riddick Mobile Museum of Art
Ronald McDonald House Endowment
Service Center-Catholic Social Services
Donald Smith Sr. Memorial Fund
Jean & Jack Smith Restricted Charitable Fund
Southwest Alabama Advised Disaster Endowment Fund
Southwest Alabama Advised Disaster Grant Fund
Spring Hill College Endowment
St. James Major Catholic Church Fund
St. Mary's Home Endowment
Strauss Charitable Fund Edith Murphy Foundation
Mary Sands Sturgeon Memorial
Endowed Annual Gift Fund of United Way
University of South Alabama Endowment
Constantine E. (Deanie) Vacalis Memorial
WHIL Endowment Fund
LaVisa Wilson Memorial
Wade and Sandra Wright Fund
Edith G. and Edwin A. Zelnicker, Jr. Beque

DONOR ADVISED

Angels Arms Animal Welfare Fund
Anonymous Charitable Fund I
Anonymous Charitable Fund III
Anonymous Charitable Fund IV
Anonymous Charitable Fund VI
Anonymous Charitable Fund VIII
The J.L. Bedsole Foundation Fund
Walter A. & Loresa Bell Charitable Fund
Joseph Barr Biggs Charitable Fund
Margaret Cooper Biggs Charitable Fund
Sarah Knox Biggs Charitable Fund
Will R. Blackburn Foundation Fund
Barry Lee Booth, DMD Family Fund
Cane Family Fund
Cape Charitable Fund
Fred & Ann Clark Charitable Fund
William "Bill" Clark Legacy Group Fund
Commonwealth National Bank Fund
Beverly & J. Gary Cooper Charitable Fund
David J. Cooper, Jr. Charitable Fund
S. G. Crawford Charitable Fund
John D. & Myriam Crosby Fund
John and Brenda Davis Fund
Ann & A.F. Delchamps Jr. Charitable Fund
Oliver H. & Otilia M. Delchamps Jr. Charitable Fund
Diabetic Children of Alabama, Inc. Fund
Michael C. & Patsy B. Dow Charitable Fund
A. Owen III & Kathryn Wilburn Drey Fund
Early Childhood Development Fund
Carolyn & Bernard Eichold Fund
Eichold Family Foundation Fund
Robert and Terrie Foster Fund
Gulf Shores Title Charitable Fund
ABH Fund
Doris C. & Robert M. Hodgson Fund
Honor Flight South Alabama Fund
Brittany Huber Memorial Foundation Fund
John Jacobson Family Foundation Fund

Sally & Vivian G Johnston Jr Charitable Fund
John H & Myrtle I Jones Charitable Fund
Kaiser Family Fund
Kids for Kids Foundation
Stillman D. Knight Fund
Austin Lacey Charitable Fund
Leslie & Edward B Ladd Charitable Fund
Russell Ladd Fund
Mr. & Mrs. Allen H. Ladd Fund
The Larkspur Fund
Kate and Joe Lavelle Family Fund
Ashleigh Cooper Leland Charitable Fund
Cooper Knowles Leland Charitable Fund
Mary Stadther Leland Charitable Fund
Thomas Mikell Leland III Charitable Fund
Mathews Trust Funds
Ben May Memorial Fund
Charles E. and Evelyn B. McNeil Philanthropic Fund
Wayne D. McRae Fund
Meisler Charitable Fund
Melton Family Fund
Metcalf Charitable Trust
Anne and Champ Meyercord Family Fund
Mayer & Arlene Mitchell & Abraham A. Mitchell Fund
Mitchell Company Charities
Mobile County Sheriff's Flotilla Fund
Penny Nason Memorial Foundation
Marguerite & Patrick O'Malley
Ned & Janice Owens Fund
Participative Research Foundation
Davis Pilot Family Fund
Point Clear Rotary Club Fund
Prodissee Pantry Fund
Edna H. Rivers Charitable Fund
James "Fat" Robertson Donor Advised Fund
The Alabama Romanchuk Fund
Rotary Conservation Education Fund
The Rouse Charitable Fund
Sapling Charitable Fund
The Seifert Fund
Esther and Herman Silver Memorial Fund
Teresa & Norvelle Smith Fund
Patti and Lee Smith Memorial
Melvin Stein Charitable Fund
Sandy & Jean Stimpson Charitable Fund
William C. Sturgeon Program Development Fund
William J. Suffich Family Fund
Thompson Holdings Foundation Funds
Trufant Family Charitable Fund
John and Mary Tucker Fund
Turner Family Donor Advised Fund
The Veterans Assistance Fund
Volkert Charitable Fund
Watts Family Fund
White Oaks Foundation Fund
The John Roy Whitehead Fund
J & R J Williams Fund
J.L. & R.K. Williamson Charitable Fund
Gainell and Randy Wingard Cancer Research Fund
Beverly Winn's Fund for the Birds
Wintzell's Restaurants Fund
Women's Fund of South Alabama
Youth Grant Allocation Board Endowment
Helen A. Young Charitable Fund
Kela and Harry Zarembo Charitable Fund

FIELD OF INTEREST

Alcoholics Recovery Fund
Josephine Dorgan Carney Fund
Chandler Capital Campaign Fund
Bertha Marie Dorgan Fund
John A. & Mary A. Dorgan Fund
Irene P. Kay Charitable Fund
Lester Kay Charitable Fund

Dillon & Virginia S. March Endowment
Medical Interest Fund
Clyde C. Snyder Art & Classical Music
Community Social Impact Endowment Fund
Ruby Irene Stephens and Mildred Freeman Stephens Endowment
Fund

SCHOLARSHIP

Carolyn Smith Adams Scholarship
Ann St Baptist Church Mem II
Charles B. Arendall Scholarship Fund
Arendall/Boone Fund
First Baptist Church Chickasaw/Colleen
& Kenneth Bergdolt Scholarship
BIA, Rosenwald, Union High School Scholarship Fund
Constance S. Bolton Scholarship Fund
Paul J. Bueche Memorial Fund
Kinsley Elizabeth Bulger Memorial Scholarship
Lucille Burson Scholarship Fund
Chadwick David Chesser Salutatorian Scholarship
David Christopher Coley Memorial
C. V. Daniels Memorial Scholarship
Edmund L. Deasy Scholarship
Alfred F. Delchamps Sr. Memorial Scholarship Fund
W. C. & Jeanette Dobbs Lectures Fund
Brad Douglas Memorial Scholarship Fund
Anita S. Edwards Scholarship Fund
Jack Edwards Scholarship Fund
Sam & Charlotte Eichold Endowment Fund
The Eichold MD/MPH Scholarship Fund
Orline Florey Endowment Fund
Roland and Jean Fry Scholarship Fund
Samuel Willard Gates Scholarship Fund
Beulah Goode Memorial and Thelma Goode Scholarship Fund
Dr. Escous Blackwell Goode Scholarship
Charles Hand Scholarship Fund
Wendell Hart Scholarship Fund
Gavin "Gee" Hunter Agricultural Scholarship
Hilliard P. and Helen P. Jenkins Scholarship
Al & Molly Kahn Scholarship Fund
Kathy P. Knight Scholarship Fund
Evie L. Kohen Scholarship Fund
Charles Lang Christian Leadership Scholarship
Sue & Sidney Magnes Scholarship Fund
Rev. C. R. Maples Memorial Scholarship
Elizabeth Martin Wilma Scrivner Scholarship Fund
Roy F. Martin Scholarship Fund
Thomas T. Martin Scholarship Fund
T. Massey/Martha Bedsole Scholarship
Mathews Scholarship Fund
Hooper W. Matthews Jr. Forestry Scholarship
Ben May Scholarship Fund
Dr. Charles & Patricia May Scholarship
Harry E. & Lula H. McCarn Nurses' Scholarship
Wayne D. McRae Scholarship
Mobile County Education Fund
Murphy Alumni Association, Inc./Curtis Williams Scholarship Fund
Murphy High School Class of '31 Scholarship Fund
Steve and Carolyn Perry Scholarship Fund
H. Austill Pharr Memorial Fund
Pat Percy Education Trust Fund
The Poarch Creek Indian Community Scholarship Fund
Mary & Council Powell Scholarship Fund
Dick Robertson Scholarship
Dorothy S. Saad Nursing Scholarship Fund
Josephine Salter Educational Scholarship Fund
Sara King Shepard Memorial Scholarship
Gus Shopoff Scholarship Fund
Spring Hill College Class of '51 Scholarship Fund
Mary W. Steedley Scholarship Fund
Thompson Holdings Foundation Scholarship Fund
University of Mobile Scholarship
Fannye Utsey Memorial Scholarship Fund
W K Weaver Jr. Endowment Scholarship

Roy R. Wilkie Scholarship Fund
Patricia Boyd Wilson Scholarship Fund
Joe Wayne Wright Jr. Scholarship Fund

SUPPORTING ORGANIZATION

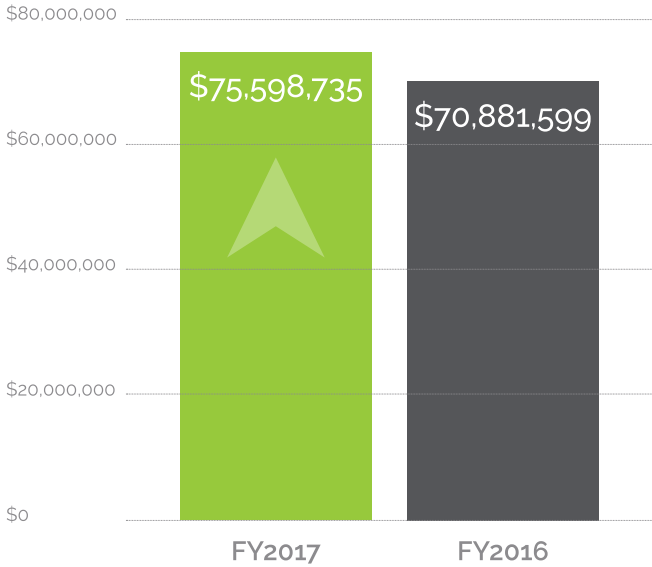
Goldberg Family Foundation

UNDESIGNATED

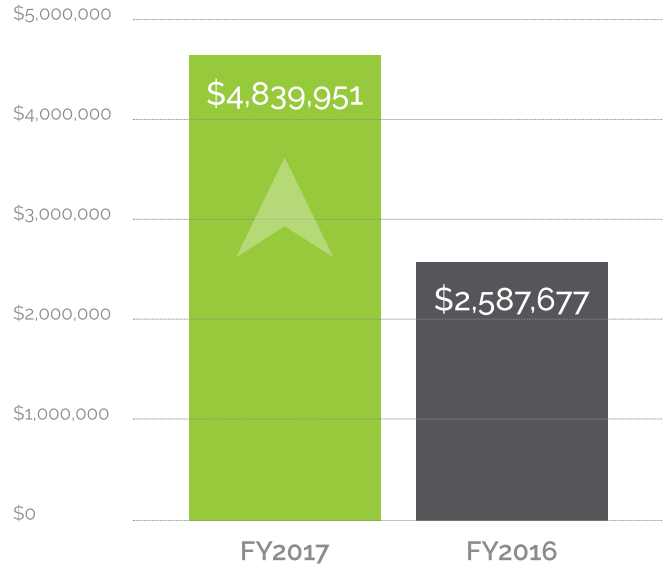
Hank Aaron Fund
Alabama Power Foundation Unrestricted
AmSouth Bank Unrestricted
Baldwin County Undesignated Fund
Charles Barkley Undesignated Fund
The Batchelor Fund
Walter & Loresa Bell Unrestricted
Book of Memory Fund
Glen P. and Esther G. Brock Fund
CFSA Community Endowment Unrestricted Fund
Ralph B Chandler Charitable
David Christopher Coley Unrestricted
Crampton Trust Unrestricted
Alfred F. Delchamps Sr. Fund
Ann & Fred Delchamps Jr. Memorial
Oliver H Jr & Otilia M Delchamps Fund
Frank P. Ellis Fund
Robert & Terrie Foster Undesignated Fund
Founder's Society Fund
Kenneth R & Zelma M Giddens Fund
Hand Arendall Unrestricted
John & Mila Hendon Unrestricted
R. Lloyd & Annie Meaheer Hill Fund
Edward A. Hirs Sr. Fund
Dennis Howard Fund
Mary Jane Huffman Fund
Walter N. Ingram Unrestricted Fund
Jeannette G. & Julius Kretzer Fund
Lippincott Warren Honorarium Fund
William A. & Marilyn Lubel Fund
Phil and Katherine Maher Unrestricted
Jay Maisel Memorial Fund
Jean and Julius Marx Fund
Ben May Charitable Unrestricted
J. Finley McRae Fund
Wayne D. McRae Undesignated
Metcalf Undesignated Fund
Mitchell Unrestricted
W. Davis Pilot Jr. Undesignated Fund
Regions Bank Unrestricted
Safe Harbor Community Fund
Ogden Shropshire Fund
Jean and Jack Smith Fund
Sybil H. Smith Unrestricted
South Trust Bank Unrestricted
Melvin and D.C. Stein Unrestricted
Strauss Charitable Undesignated Fund
Mae Ellis Taul & Frank P Ellis Jr.
Waterman Family Fund
Peggy & Blacksher Whitespunner Fund
Roy Wilkie Unrestricted
Jacque & Robert Williams Jr Undesignated
Wingard Charitable Undesignated Fund

FINANCIAL INFORMATION

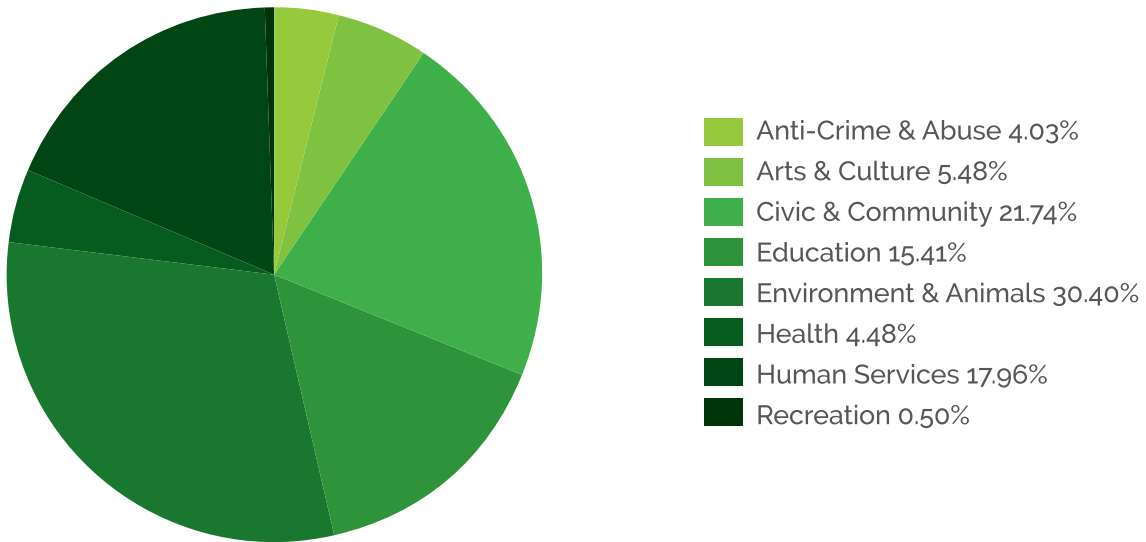
ASSETS*



CONTRIBUTIONS & GRANTS RECEIVED*



GRANTS DISTRIBUTED BY PROGRAM AREA - \$5,278,542.69*



*Includes agency funds.

CFSA is audited by Russell, Thompson Butler and Houston, LLP.

A copy of the audited financial statements is available on our website along with the IRS Form 990.

CHARITABLE FUNDS AND SERVICES

Individuals, families, corporations, communities and nonprofit organizations may establish funds and other services with The Community Foundation of South Alabama. We offer flexible options to meet charitable goals.

UNDESIGNATED FUNDS

are established by donors to provide support to the community and its emerging needs. Funds are distributed for charitable purposes at the discretion of The Community Foundation of South Alabama's board. These funds give us the flexibility to respond quickly to the greatest community needs and shifting priorities.

FIELD OF INTEREST FUNDS

utilize the foundation's grant-making capabilities. Donors select their field of interest and CFSA processes grant applications and awards grants to the most impactful programs.

DONOR ADVISED FUNDS

allow the donor to recommend grants to their favorite charitable organization. Donor advised funds operate much like a private foundation but without the expense and tax-reporting requirements.

DESIGNATED FUNDS

are established by donors to benefit one or more specific organizations or programs.

AGENCY FUNDS

are established by nonprofit organizations to provide an annual source of income to support the organization's mission.

SCHOLARSHIP FUNDS

provide grants for educational purposes. Donors may recommend an academic focus for their scholarship fund and eligibility criteria.

AFFILIATE FUNDS

are established by a local group of citizens interested in supporting a specific geographic area and are an advisory committee to the Foundation. This structure allows for a local presence with all the benefits of the Foundation.

A SUPPORTING ORGANIZATION

is an alternative to a private foundation and far less restrictive than a private foundation. Supporting Organizations do not have a mandatory distribution and generally do not incur excise tax as a private foundation does. The Community Foundation of South Alabama handles all the administrative oversight, including annual audits, state and IRS filings.

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Sam Covert, Vice Chair
Kathy Miller, Secretary
Mark Hieronymus, Treasurer
Norman Pitman, Immediate Past Chair

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Blacksher White-Spunner
Bob Williams



COMMUNITY
FOUNDATION
of South Alabama

For more information
call 251-438-5591