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.

FROM THE CHAIR AND PRESIDENT

The Community Foundation of South Alabama serves by building.

We build bridges linking donors to philanthropy. We build networks across eight counties. We build dreams for those in need. Working with you, we build communities.

Through your generosity, the Community Foundation provides services and expertise for donors to make wise decisions for charitable giving. Donors trust us to establish funds supporting nonprofits, schools, churches and municipalities throughout our region.

Our collective investment component amplifies your contributions for maximum impact to help you help others. We assume the administrative responsibilities of charity, allowing you to focus on the rewards—giving, helping and building.

Thank you for allowing us to share your vision for helping others. Together, we work to restore hope to the underserved. Together, we lift up those who have little. Together, we support our veterans, preserve natural resources, nurture the arts and much more.

Together, we build community.

In the coming year, we will continue to do our part in building community in towns, cities and neighborhoods throughout our region. We thank the generous people who give through this foundation to help advance our work and invite everyone to join hands with us.

Sam Covert
Chair, Board of Directors

Rebecca Byrne
President & CEO
The name is fictitious. The story is not. Not long ago, Ruth, a 10-year-old Mobile girl, walked into Boys and Girls Club of South Alabama looking for a new life.

"Her father was abusive and her mother worked multiple jobs," recalled club CEO, Tim Wills. But Ruth enjoyed the organization’s activities—sports, arts and especially debate team. Today, Ruth is a practicing attorney with a successful law firm.

She is a success story. "Fifty-seven percent of our alumni say we saved their lives," noted Wills, about club programs, including workforce training and development. But the gap is wide.

In 2017, the Community Foundation launched its Closing the Opportunity Gap Initiative, with four cradle-to-career priorities:

- Provide adequate parent and family education.
- Increase access to Pre-K programs.
- Improve participation in extracurricular or out of school activities.
- Develop career-readiness skills for the 21st century workforce.

An Initiative premise is that all kids deserve the opportunity to reach their full potential. But children from K-12 in low income families are often sidelined, not just in sports, but education, jobs and even in life itself.

"There is frequently a circle of poverty," added Diane Pruitt, Executive Director of Alpha Women’s Resource Center, speaking about unplanned pregnancies and solutions. "Our ladies often come to us with limited access to medical care and just word-of-mouth information about pregnancy and birth. We emphasize accurate, up-to-date information and solutions for every step of the way."

Closing the opportunity gap is vital in building strong, thriving children who grow into capable, contributive adults for a prosperous and sustainable society.

2018 Grantees: Alabama 4H Foundation, Alabama Shakespeare Festival, Alpha Women’s Resource Center, Boys & Girls Club of South Alabama, Gulf Regional Early Childhood Services, Mobile Symphony, Palmer Williams Group, PASSAGE of University of South Alabama and Prichard Preparatory School.
Veterans Initiative
BUILDING COMMUNITY WITH THOSE WHO SERVED

About 60,000 veterans live in our eight-county region and the number is growing. The Community Foundation’s Veterans Initiative is a four-year, $600,000 effort to address their needs. In 2018, approximately $420,000 was awarded.

“In addition to Alabama being a very friendly state, Mobile is a growing city. These two factors combined make our region an attractive place for retirees in general,” noted Duke Walker, past chair of the Veterans Initiative Advisory Committee and retired USCG Captain. But more growth means more needs for the men and women who served our country.

For many veterans, the journey from military to civilian life is a difficult path. Issues including housing, job training, education and mental and physical health needs are major concerns for former soldiers. “We spent a significant amount of time analyzing the best applications for grant money, looking at subgroups, not just a broad overview of the community,” Walker added. “We asked ourselves, what are the greatest needs?”

As a result of a local veterans needs assessment and with the recommendation of a Veteran Advisory Committee, the Community Foundation identified the following primary objectives for its competitive grantmaking program:
• Improving awareness of available services.
• Addressing the underlying causes of substance abuse.
• Providing therapy for mental health issues.
• Offering treatment for substance abuse.

“The Community Foundation of South Alabama has a tremendous impact on our ability to provide equine therapy to veterans and their families,” said Kari Whatley, Licensed Professional Counselor, Equine Therapy Group Foundation. “Thanks to their Veterans Initiative, we have served more servicemen and women than ever before. The Community Foundation’s grant has transformed our program and the amount of services, family days and workshops we are able to provide to these very deserving men and women.”

Affiliate Foundations
BUILDING COMMUNITY THROUGH OUTREACH

This past year, we were pleased to add two new affiliate foundations, Fairhope/Point Clear and Tri-City Community Foundations. The Atmore Community Foundation was founded in 2017. In partnership with the Community Foundation of South Alabama, these affiliates engage local leaders, transcend boundaries and make a difference. Each has distinct personalities, needs and desires yet share common goals.

FAIRHOPE/POINT CLEAR COMMUNITY FOUNDATION

“We partnered with the Community Foundation for many reasons,” said Fairhope/Point Clear chair, Ashley Bonner. “But one particular reason is the investment component. The Community Foundation of South Alabama can take donations, establish funds and through its expertise in investing, amplify our giving.”

Bonner noted Fairhope and Point Clear are both known for generosity. “But this is something we can offer to steer our communities’ spirit of giving,” she adds. “The Community Foundation draws on 250 years of collective experience in donation investing. It’s almost like a secret and we are excited to get the word out to our community.”

TRI-CITY COMMUNITY FOUNDATION

“Foley, Gulf Shores and Orange Beach are independent with distinct attributes they are proud of and should be,” said Tri-City chair, Michelle Hodges. “We have always worked together. But we want to maintain that focus to showcase the strength and commitment of these three cities.” Hodges added that working together, using grant funding and drawing on Community Foundation expertise, enables the tri-cities to work in unison for the overall wellbeing.

ATMORE COMMUNITY FOUNDATION

Last year the Atmore Community Foundation announced it had returned $90,000 to the community since 2017. “This is just the beginning for us,” said Audrey Moon, Advisory Committee Chair. “We’re even more determined to continue our grant-making efforts and make an impact on our community.”

Escambia County Middle School is one such grantee. The 500-student campus is the recipient of a hands-on collaboration lab designed to promote problem solving and teach skills in STEM (science, technology, engineering and math) areas.
2018 EVENT HIGHLIGHTS

Annual Luncheon
BRINGING COMMUNITY TOGETHER

The 2018 Annual Luncheon welcomed over 500 community leaders, donors and nonprofit organizations to the Renaissance Riverview Plaza Hotel on Friday, March 23. Guest speaker was Jon Solomon, Editorial Director for The Aspen Institute Sports & Society Program and former national college football reporter at CBSSports.com. Mary B. Austin Elementary student, Owen Norwood, stole the spotlight with his story of how youth sports has made a profound impact on his life. The annual event provides an opportunity for citizens to come together to discuss our past collective successes and learn of future endeavors to advance our shared mission of building community.

Distinguished Philanthropist of the Year Award
BUILDING COMMUNITY BY GIVING GENEROUSLY

The Ann and Fred Delchamps Distinguished Philanthropist Award was created in 2014 to honor individuals and families in our community who have demonstrated exceptional philanthropic giving. In 2018, we recognized Abe Mitchell and Arlene Mitchell for the legacy of giving the Mitchell family has bestowed upon southwest Alabama. Philanthropists and financiers, the Mitchell brothers, Abraham and Mayer, and Mayer’s wife, Arlene, have donated millions to fund education, medical and business institutions in the Mobile area. After Mayer’s diagnosis of Hodgkin’s lymphoma at age 36, he received treatment in Rochester, NY. That experience convinced the Mitchells to help Mobile develop its own cancer center. Of the $48 million they have donated to the University of South Alabama (USA), $22 million went toward establishing a cancer research complex, which was subsequently named the Mitchell Cancer Institute. The family has funded other projects, such as the USA arena, now called the Mitchell Center, and the establishment of the Mitchell College of Business.

Women’s Forum
BEING TRUE TO ONESelf

Our 4th annual Women’s Forum was hosted in coordination with Congressman Bradley Byrne at the Battle House Hotel in August. The keynote speaker was Susie Redman, professional golfer and native Mobilian. A graduate of Julius T. Wright, Redman has been inducted into the Mobile Sports Hall of Fame and was named the 1998 Alabama Sportswriter’s Association Female Athlete of the Year. With this year’s theme of “Being True to Oneself,” the Forum also featured local women leaders: Liz Garza, Owner of FOY Superfoods; Ginna Inge, Co-Owner of The Steeple; Jennifer Langhinrichsen-Rohling, professor at the University of South Alabama; and Contina Woods, VP & Treasury Management Officer at Regions. Dr. Lynne Chronister, VP of Research and Economic Development for USA, served as moderator for the panel discussion. The event drew nearly 500 participants and provided an opportunity for community engagement and mentorship.

Project Play Kickoff
ASSESSING YOUTH SPORTS

As part of our Closing the Opportunity Gap Initiative, the Community Foundation partnered with The Aspen Institute Sports and Society Program to conduct an overall assessment of youth sports, recreation and physical literacy across Mobile County. The Jake Peavy Foundation, the Blue Cross Blue Shield of Alabama Caring Foundation and a task force of 15 local leaders across the public and private sectors played an integral role in the collection of data that supported the “State of Play” final report published by The Aspen Institute in October.

Beacon Award
LEADING THE WAY FOR CORPORATE PHILANTHROPY

The Beacon Award was established to recognize a business or corporation that embodies the spirit of giving. As Middle Bay Lighthouse serves as a beacon of light and inspiration, the recipient of the Beacon Award also serves as a philanthropic leader in its community. During national Community Foundation Week, we bestowed this recognition upon the Poarch Band of Creek Indians (PCI) for their statewide philanthropic contributions. PCI has established a $1 million scholarship at the Community Foundation to benefit high school graduates in Alabama and parts of the Florida Panhandle. Through a $500,000 gift, PCI helped establish a Native American studies program at the University of South Alabama. Since 2011, PCI has donated more than $5.2 million to area schools in southwest Alabama. The Poarch Band of Creek Indians is an active partner in the state of Alabama, contributing to economic, educational, social and cultural projects benefitting both tribal members and residents in their local communities and towns.
BY THE NUMBERS

COMMUNITY FOUNDATION OF SOUTH ALABAMA 2018

For over forty years, generous individuals, families and businesses in southwest Alabama have entrusted their philanthropic assets to the Community Foundation of South Alabama. The Community Foundation has a track record of strong investment performance across changing economic times. We seek to maximize dollars available to fund critical work in our communities today, while prudently stewarding and growing these resources to maintain an enduring source of philanthropic capital for generations to come.

$2,400,445
Total donations

$3,456,557
Total grants, program initiatives and scholarships awarded

$79,220,217
Total current assets

GRANTS BY INTEREST AREA

Civic & Community 35%
Education 20%
Human Services 20%
Health 12%
Arts & Culture 8%
Anti-Crime & Abuse 4%
Environment & Animals 1%
Recreation <1%

709
Grants awarded to nonprofit organizations

$3,329,431
Total grants and program initiatives

83
Scholarships awarded to students

$127,126
Total scholarships

CHARITABLE FUNDS AND SERVICES

We offer a unique model of philanthropy which maximizes the charitable impact of individuals, families, corporations, communities and nonprofit organizations. Here are flexible options and other services available through the Community Foundation of South Alabama.

DONOR ADVISED/BUSINESS ADVISED FUNDS

are established by individuals, families and companies who wish to participate actively in the grantmaking process. A donor advised fund allows the donor to recommend grants to their favorite charitable organization(s). These funds operate much like a private foundation but without the expense and tax-reporting requirements. When a company creates a business advised fund, we support their goals through a full spectrum of services, including grantmaking, due diligence, site visits and community updates.

DESIGNATED FUNDS

allow the donor to support the good work of a specific nonprofit organization. We handle the details of managing the fund, allowing the staff of the nonprofit organization to stay focused on its mission.

UNDESIGNATED FUNDS

are established when donors give to the foundation and entrust us to use the funds in ways that strengthen our local community. Funds are distributed for charitable purposes at our discretion, giving us the flexibility to respond quickly to the greatest needs and shifting priorities of our community.

SCHOLARSHIP FUNDS

can be structured to benefit students at any education level or institution. A scholarship fund can also be created to honor a loved one. Donors may recommend an academic focus for their scholarship fund and eligibility criteria.

AGENCY FUNDS

are established by nonprofit organizations to provide an annual source of income to support their mission and meet both current and future needs. They look to our Board of Directors for strong investment oversight and ask our staff to manage all of the administrative details, allowing the nonprofit to focus on what it does best in the community.

FIELD OF INTEREST FUNDS

are established to support particular interest areas, specific program initiatives, causes or geographic areas designated by the donor. We select the grantee through our due diligence, application and thorough review process.

A SUPPORTING ORGANIZATION

is an alternative to a private foundation and far less restrictive. Supporting organizations do not have a mandatory distribution and generally do not incur excise tax. We handle all of the administrative oversight, including annual audits, as well as state and IRS filings.

AN AFFILIATE FOUNDATION

is created by a local group of citizens interested in supporting a specific geographic area. These citizens serve as an advisory committee to us, a structure which allows for a local presence supported by all the benefits of the Community Foundation.
# LEADERSHIP

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- Marietta Urquhart, Secretary
- Mark Hieronymus, Treasurer
- Bob Higgins, Immediate Past Chair

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- Carolyn Marston, Director of Operations
- Brooke Switzer, Director of Community Initiatives
- Leigha Bolton, Administrative Coordinator

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- Maggie Bagwell Lacey, Secretary
- Bill McNair, Board Liaison
- Allison Ashurst
- Beth Craft
- Jeanna Pilot

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**COMMUNITY FOUNDATION of South Alabama**

P.O. Box 990 · Mobile, Alabama 36601 · 251.438.5591 · communityfoundationsa.org