

## Required Report Pursuant to Chapter 2014-096 Citizen Support and Direct Support Organizations- s. 20.058, F.S.

By August 15 of each year, each agency shall report to the Governor, the President of the Senate, the Speaker of the House of Representatives, and the Office of Program Policy Analysis and Government Accountability the information provided by each citizen support organization and direct-support organization. The report must also include a recommendation by the agency, with supporting rationale, to continue, terminate or modify the agency’s association with each organization.

Name, Mailing Address, Telephone Number and Web Address	Statutory Authority	Mission	Strategic Plan	Code of Ethics/ IRS Form 990	Rationale for Continuation of Foundation
<p>The Florida Education Foundation, Inc.                      325 West Gaines Street, Room 1524                      Tallahassee, FL 32399-0400                      850-245-9692  <a href="http://www.floridaeducationfoundation.org">www.floridaeducationfoundation.org</a></p>	<p>Section 1001.24, F.S.</p>	<p>Mission - The Florida Education Foundation promotes and supports academic excellence for pre-kindergarten through 12th grade students in Florida. The foundation recognizes outstanding teachers and educational contributors, develops strategic alliances with business organizations and advances statewide initiatives.</p> <p>The Florida Education Foundation fosters involvement in schools by:</p> <ul style="list-style-type: none"> <li>• Providing resources for innovative and effective instruction;</li> <li>• Increasing direct participation of the business community in pre-kindergarten through 12th grade education;</li> <li>• Increasing the number of successful local programs and projects dedicated to improving student achievement;</li> <li>• Recognizing outstanding educators including principals, teachers and school support staff;</li> <li>• Encouraging students to be prepared to make informed, appropriate educational and vocational choices;</li> <li>• Cultivating a future talent supply for Florida via the Sunshine State Scholars program; and</li> <li>• Improving graduation rates through effective school leadership and educator quality</li> </ul>	<p>Three-Year Plan – From its Strategic Planning Session in August 2013, the Florida Education Foundation Board of Directors determined that it will advance efforts specifically to</p> <ul style="list-style-type: none"> <li>• Increase recognition and the direct participation of the business community in PreK-12 education via the redesign and launch of the Commissioner’s Business Recognition Awards program;</li> <li>• Cultivate a future STEM talent supply for Florida via growth and enhancement of the Sunshine State Scholars program;</li> <li>• Provide training opportunities for teachers and principals to improve and develop effective leadership skills via nationally recognized professional development programs;</li> <li>• Work with the Education Commissioner to determine the viability of the Ambassador to Commissioner of Education Program;</li> <li>• Continue to help with communication and messaging on the Florida Standards and determine what level of support is appropriate for FL Standards professional development; and</li> <li>• Explore potential initiatives in entrepreneurship, civics, and other non-STEM related subject areas.</li> </ul>	<p>See Tab 1 for: Annual Report Code of Ethics Policy Form 990</p>	<ul style="list-style-type: none"> <li>• Remains true to its mission and is focused on a strategic plan that is closely aligned with the priorities of the FDOE;</li> <li>• Serves as an efficient fiscal agent for statewide education-specific workshops and conferences;</li> <li>• Serves as the fiscal agent for several corporate and private grants that benefit preK-12 education in Florida;</li> <li>• Exhibits sound fiscal management which is documented in its annual outside audit;</li> <li>• Is an effective vehicle for cultivating meaningful partnerships between the FDOE and other stakeholders;</li> <li>• Expedites Commissioner-initiated projects and special task forces; and</li> <li>• Is actively engaged in developing and successfully executing innovative programs such as the Sunshine State Scholars initiative and the FL Standards K-5 math training videos.</li> </ul>

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Name, Mailing Address, Telephone Number and Web Address	Statutory Authority	Mission	Strategic Plan	Code of Ethics/ IRS Form 990	Rationale for Continuation of Foundation
<p>Florida College System Foundation                      P.O. Box 10503                      Tallahassee, FL 32302                      850-245-9494  <a href="http://www.fldoe.org/fcs/foundation">www.fldoe.org/fcs/foundation</a></p>	<p>Section 1004.71, F.S.</p>	<p>The Florida College System Foundation is organized and shall be operated exclusively for charitable, cultural, scientific and educational purposes, and for the realization and attainment thereof for the following purposes:</p> <ul style="list-style-type: none"> <li>a. To support the development of economic services to business and industry;</li> <li>b. To promote public involvement and awareness of state educational policy issues;</li> <li>c. To provide scholarships and other kinds of support services to students in furtherance of their postsecondary education;</li> <li>d. To publicize and promote activities in support of the Florida College System;</li> <li>e. To support the development of innovative programs;</li> <li>f. To support the advancement of sound educational policies and programs;</li> <li>g. To support the activities and staff of the Chancellor of the Florida College System as they relate to the mission of the Florida College System;</li> <li>h. To solicit and receive by gift, devise or bequest, and to acquire by purchase, lease, exchange, or otherwise, or to dispose of by sale, exchange, transfer or otherwise, property, both real and personal, either as absolute owner of, as trustee thereof, and to manage and administer the same;</li> <li>i. To receive contributions, grants, gifts, from and</li> </ul>	<p>See attachment – Strategic Plan-Goals</p>	<p>See Tab 2 for: Mission Strategic Plan Form 990 Conflict of Interest Policy</p>	<p>The Florida College System is the primary access point to undergraduate education for Floridians, including recent high school graduates and returning adult students. The Florida College System responds quickly and efficiently to meet the demand of employers by aligning certificate and degree programs with regional workforce needs. With an array of programs and services, The Florida College System's 28 institutions serve individuals, communities, and the state with low cost, high quality education opportunities. The Florida College System Foundation has been providing student scholarships to help these students succeed and enter the workforce since 1999. The Foundation is a 501(c)(3) non-profit organization and the official direct support organization for the Florida College System. The Foundation is organized and operated exclusively to receive, hold, invest and administer property and to make expenditures to, or for the benefit of, the Florida College System institutions in this state. The Foundation has provided \$7,252,162 in scholarships to students enrolled in Florida's 28 colleges since its inception. The Florida College System Foundation will award over \$900,000 in scholarships for the 2014-2015 academic year.</p> <p>The Florida College System Foundation supports</p>

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<p>Florida College System Foundation                      P.O. Box 10503                      Tallahassee, FL 32302                      850-245-9494  <a href="http://www.fldoe.org/fcs/foundation">www.fldoe.org/fcs/foundation</a></p>		<p>to transfer property, both real and personal, to other organizations identified and associated with The Florida College System Foundation, Inc., which are tax exempt organizations under the provisions of Section 501 (c) (3) of the Internal Revenue Code of the United States of America or acts amendatory thereof or supplementary thereto; and</p> <p>j. In furtherance of the above purposes, to conduct any and all activities permitted to an organization exempt under Section 501 (c) (3) of the Internal Revenue Code or acts amendatory thereof or supplementary thereto.</p> <p>It is the policy of this board that we recruit such gifts and donations from national and statewide groups so as not to be in conflict with local colleges. The Florida College System Foundation will coordinate and communicate closely with the 28 college foundation directors to eliminate any potential for conflict or competition.</p>			<p>the comprehensive mission of the Florida College System and its students to be the nation's leading advocate for postsecondary educational opportunity, access and student success while respecting and protecting the autonomy and local support of Florida's 28 colleges. Our strategic plan includes goals to increase statewide partnerships for student scholarships, and continue to expand system wide support with our local colleges with federal and private grants to promote student success and increase graduation rates.</p>

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Name, Mailing Address, Telephone Number and Web Address	Statutory Authority	Mission	Strategic Plan	Code of Ethics/ IRS Form 990	Rationale for Continuation of Foundation
<p>Blind Services Foundation of Florida, Inc.            325 W. Gaines St. Room 1114,            Turlington Building,            Tallahassee, Florida 32399            1-800-342-1828  <a href="http://www.blindservicesfoundation.org">www.blindservicesfoundation.org</a></p>	<p>Section 413.0111, F.S.</p>	<p>The purpose of the foundation is to raise funds to support services provided by the Florida Department of Education (FDOE), Florida Division of Blind Services (FDBS). One source of funding is through the sale of a specialized motorcycle tag called "Bikers Care." The foundation also receives donations from individuals and corporations. The Blind Services Foundation of Florida, Inc., serves Florida's blind citizens with intensity. Our efforts are to use funds of the foundation to support programs of the FDBS; and to conduct programs and activities, and initiate developmental projects for the benefit of citizens of Florida who are blind and/or visually impaired.</p> <p>Over the last three years, the Blind Services Foundation of Florida, Inc., has accomplished the following initiatives:</p> <ul style="list-style-type: none"> <li>• Developed and launched of an informative and active website;</li> <li>• Published and disbursed brochures;</li> <li>• Secured twenty percent to the Blind Services Foundation from the sale of motorcycle specialty license plates (Florida.320.08068);</li> <li>• 2011-2012 awarded \$2,691 to 12 Blind Babies Programs in Florida for a total of \$32,292;</li> <li>• 2012-2013 awarded \$4,343.27 to FDBS for grants for special projects;</li> </ul>	<p>From its strategic planning sessions in March and April of 2014, the Blind Services Foundation of Florida, Inc., Board of Directors determined that it will advance efforts for the foundation's three-year plan to:</p> <ul style="list-style-type: none"> <li>• Increase recognition of the Bikers Care tag and the direct participation of the biker community via new marketing initiatives;</li> <li>• Provide support to encourage, challenge, motivate and recruit people, organizations and other not for profit organizations to support the FDBS as they serve Florida's blind citizens with shrinking resources and exploding senior populations;</li> <li>• Develop strategic planning to identify a statewide need for further needs assessments as they relate to services and funding;</li> <li>• Continue to help with communication and messaging of the FDBS and determine what level of support is appropriate for development; and</li> <li>• Work with the Commissioner of Education to determine the viability of the Biker's Care Tag initiative.</li> </ul>	<p>See Tab 3 for: Annual Report By Laws Code of Ethics Policy Form 990</p>	<p>The Florida Division of Blind Services rationale to continue the Blind Services Foundation of Florida, Inc., is that the foundation:</p> <ul style="list-style-type: none"> <li>• Maintains its mission and is focused on a strategic plan that is closely aligned with the priorities of the FDBS;</li> <li>• Serves as an efficient fiscal agent for statewide initiatives and developmental projects for the benefit of blind and/or visually impaired Floridians through fundraising and direct support of advocacy groups;</li> <li>• Exhibits sound fiscal management which is documented in its annual outside audit;</li> <li>• Is an effective vehicle for cultivating meaningful partnerships between the FDBS and other stakeholders; and</li> <li>• Is actively engaged in developing and successfully executing innovative programs such as the Biker's Care Tag initiative and supports the efforts of the FDBS regarding services to support the blind and/or visually impaired community.</li> </ul>

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Name, Mailing Address, Telephone Number and Web Address	Statutory Authority	Mission	Strategic Plan	Code of Ethics/ IRS Form 990	Rationale for Continuation of Foundation
Blind Services Foundation of Florida, Inc. 325 W. Gaines St. Room 1114, Turlington Building, Tallahassee, Florida 32399 1-800-342-1828 <a href="http://www.blindservicesfoundation.org">www.blindservicesfoundation.org</a>		<ul style="list-style-type: none"> <li>• 2013-2014 awarded \$53,861.19 to FDBS for outreach to potential clients; and</li> <li>• Maintained a board of seven members.</li> </ul>			

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Name, Mailing Address, Telephone Number and Web Address	Statutory Authority	Mission	Strategic Plan	Code of Ethics/ IRS Form 990	Rationale for Continuation of Foundation
Florida Endowment for Vocational Rehabilitation (dba The Able Trust) 3320 Thomasville Rd, Ste. 200 Tallahassee, FL 32308 850-224-4493 <a href="http://www.abletrust.org">www.abletrust.org</a>	Section 413.615, F.S.	To be a key leader in providing Floridians with disabilities opportunities for successful employment.	Grant awards to continue, with more emphasis on larger, multi-year grants that are directly linked to the mission of The Able Trust. <ul style="list-style-type: none"> <li>• Continuation of youth programs, specifically Florida High School High Tech (now in 39 counties) and the Florida Youth Leadership Forum.</li> <li>• Expansion of work experiences for job seekers with disabilities, which includes mentoring, job shadowing, and importantly, internships, as well as related activities.</li> <li>• Conduct an annual communications campaign directed at business and designed to change misperceptions and increase the number of people with disabilities who are successfully employed.</li> </ul>	See Tab 4 for: Strategic Plan Outcome Summary Data Ethics Policy Annual Report 990 Form	<ul style="list-style-type: none"> <li>• Remains true to its mission and is focused on a strategic plan that is closely aligned with the priorities of the FDOE Division of Vocational Rehabilitation (VR);</li> <li>• Exhibits sound fiscal management which is documented in its annual outside audit;</li> <li>• Is an effective vehicle for cultivating meaningful partnerships between the FDOE Division of Vocational Rehabilitation and other stakeholders; and</li> <li>• Is actively engaged in developing and successfully executing innovative programs, such as the Annual Youth Leadership Forum, and outcome-focused statewide employment grant-making activities.</li> <li>• The Able Trust has been a valuable partner in the Governor's Commission on the Employment of Persons with Disabilities, as well as the Governor's Employment First initiative.</li> </ul>

**FLORIDA EDUCATION FOUNDATION**  
**State of Florida Direct Support Organization Annual Report**  
**Fiscal Year 2013-2014**

*Pursuant to SB 1194, by August 1 of each year, a citizen support organization or direct support organization created or authorized pursuant to law or executive order and created, approved, or administered by an agency, shall submit an annual report to the appropriate agency.*

1. Name, mailing address, telephone number and website address:  
The Florida Education Foundation, Inc.  
325 West Gaines Street, Room 1524  
Tallahassee, FL 32399-0400  
850-245-9692  
[www.floridaeducationfoundation.org](http://www.floridaeducationfoundation.org)
2. Statutory Authority – Florida Statute 1001.24
3. Mission - The Florida Education Foundation promotes and supports academic excellence for pre-kindergarten through 12th grade students in Florida. The Foundation recognizes outstanding teachers and educational contributors, develops strategic alliances with business organizations and advances statewide initiatives.

The Florida Education Foundation fosters involvement in schools by:

- Providing resources for innovative and effective instruction;
  - Increasing direct participation of the business community in pre-kindergarten through 12th grade education;
  - Increasing the number of successful local programs and projects dedicated to improving student achievement;
  - Recognizing outstanding educators including principals, teachers and school support staff;
  - Encouraging students to be prepared to make informed, appropriate educational and vocational choices;
  - Cultivating a future talent supply for Florida via the Sunshine State Scholars program; and
  - Improving graduation rates through effective school leadership and educator quality
4. 3-Year Plan – From its Strategic Planning Session in August 2013, the Florida Education Foundation Board of Directors determined that it will advance efforts specifically to
    - Increase recognition and the direct participation of the business community in PreK-12 education via the redesign and launch of the Commissioner’s Business Recognition Awards program;

- Cultivate a future STEM talent supply for Florida via growth and enhancement of the Sunshine State Scholars program;
- Provide training opportunities for teachers and principals to improve and develop effective leadership skills via nationally recognized professional development programs;
- Work with the Education Commissioner to determine the viability of the Ambassador to Commissioner of Education Program;
- Continue to help with communication and messaging on the Florida Standards and determine what level of support is appropriate for FL Standards professional development; and
- Explore potential initiatives in entrepreneurship, civics, and other non-STEM related subject areas.

#### 5. Code of Ethics

#### 6. Rationale to continue the Florida Education Foundation. The Foundation

- Remains true to its mission and is focused on a strategic plan that is closely aligned with the priorities of the FDOE;
- Serves as an efficient fiscal agent for statewide education-specific workshops and conferences;
- Serves as the fiscal agent for several corporate and private grants that benefit preK-12 education in Florida;
- Exhibits sound fiscal management which is documented in its annual outside audit;
- Is an effective vehicle for cultivating meaningful partnerships between the FDOE and other stakeholders;
- Expedites Commissioner-initiated projects and special task forces; and
- Is actively engaged in developing and successfully executing innovative programs such as the Sunshine State Scholars initiative and the FL Standards K-5 math training videos.



## **Florida Education Foundation Code of Ethics**

- (1) **SOLICITATION OR ACCEPTANCE OF GIFTS.**—No board member shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the board member would be influenced thereby.
- (2) **UNAUTHORIZED COMPENSATION.**—No board member shall, at any time, accept any compensation, payment, or thing of value when such board member knows that it was given to influence a vote or other action in which the board member was expected to participate in his or her official capacity.
- (3) **MISUSE OF PUBLIC POSITION.**—No board member shall corruptly use or attempt to use his or her official position or any property or resource which may be within his or her trust, or perform his or her official duties, to secure a special privilege, benefit, or exemption for himself, herself, or others.
- (4) **DISCLOSURE OR USE OF CERTAIN INFORMATION.**—A current or former board member may not disclose or use information not available to members of the general public and gained by reason of his or her official position, except for information relating exclusively to governmental practices, for his or her personal gain or benefit or for the personal gain or benefit of any other person or business entity.
- (5) **VOTING CONFLICTS.** —A board member may not vote on any matter that the board member knows would inure to his or her special private gain or loss. Any board member who abstains from voting in an official capacity upon any measure that the board member knows would inure to the board member’s special private gain or loss, or who votes in an official capacity on a measure that he or she knows would inure to the special private gain or loss of any principal by whom the board member is retained or to the parent organization or subsidiary of a corporate principal by which the board member is retained other than an agency as defined in f.s. 112.312(2); or which the board member knows would inure to the special private gain or loss of a relative or business associate of the board member, shall make every reasonable effort to disclose the nature of his or her interest as a public record in a memorandum filed with the person responsible for recording the minutes of the meeting, who shall incorporate the memorandum in the minutes.

If it is not possible for the board member to file a memorandum before the vote, the memorandum must be filed with the person responsible for recording the minutes of the meeting no later than 15 days after the vote.

## Code of Ethics Policy

The Board of Directors of the Florida Education Foundation (Foundation) requires ethical conduct of all members of the Board. Each Board Member holds an important and elevated role in assuring that the highest standards of ethical practice are implemented in support of the Foundation's mission:

The Florida Education Foundation promotes and supports academic excellence for pre-kindergarten through 12th grade students in Florida. The Foundation recognizes outstanding teachers and educational contributors, develops strategic alliances with business organizations and advances statewide educational initiatives.

As a member of The Florida Education Foundation Board of Directors, I verify that:

(1) I have received a copy of the Code of Ethics and that I will follow the Code of Ethics as defined by Florida Statute 112.3251.

(2) I will formally and promptly communicate any potential conflict of interest to the Foundation Board Chair and other members of the Board of Directors.

(3) I will act at all times with honesty, integrity and independence, avoiding actual or apparent conflicts of interest in personal and professional relationships and expect and encourage such conduct by other board members.

(4) I will comply with all applicable rules and regulations of federal, state, and local governments and other appropriate private and public regulatory agencies.

(5) I will comply with the Foundation's policies and procedures, and contribute constructively to their ongoing evaluation and reformulation.

(6) I will act in good faith, responsibly, with due care, competence, and diligence, and without knowingly misrepresenting material facts or allowing my independent judgment to be subordinated.

(7) I will protect and respect the confidentiality of information acquired in the course of my membership on the Board except when authorized or otherwise legally obligated to disclose. Confidential information acquired in the course of my membership on the Board shall not be used for personal advantage.

(8) I will responsibly use and control assets and other resources entrusted to me.

By signing this statement, I acknowledge that I have read, understand, and agree to adhere to this Ethics Statement.

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Signature

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Printed Name

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Title

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Date

# TAX RETURN FILING INSTRUCTIONS

FORM 990

FOR THE YEAR ENDING

JUNE 30, 2013

<b>Prepared for</b>	FLORIDA EDUCATION FOUNDATION, INC. 325 W. GAINES ST., STE. 1524 TALLAHASSEE, FL 32399
<b>Prepared by</b>	CARR, RIGGS & INGRAM, LLC 1713 MAHAN DRIVE TALLAHASSEE, FL 32308
<b>Amount due or refund</b>	NOT APPLICABLE
<b>Make check payable to</b>	NOT APPLICABLE
<b>Mail tax return and check (if applicable) to</b>	NOT APPLICABLE
<b>Return must be mailed on or before</b>	NOT APPLICABLE
<b>Special Instructions</b>	<p>THIS RETURN HAS QUALIFIED FOR ELECTRONIC FILING. AFTER YOU HAVE REVIEWED THE RETURN FOR COMPLETENESS AND ACCURACY, PLEASE SIGN, DATE AND RETURN FORM 8879-EO TO OUR OFFICE. WE WILL TRANSMIT THE RETURN ELECTRONICALLY TO THE IRS AND NO FURTHER ACTION IS REQUIRED. RETURN FORM 8879-EO TO US BY MAY 15, 2014.</p> <p><b>YOUR FILE COPY CARR, RIGGS &amp; INGRAM, LLC</b></p>

Form **990**

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No. 1545-0047

**2012**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements.

**A For the 2012 calendar year, or tax year beginning JUL 1, 2012 and ending JUN 30, 2013**

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C Name of organization</b> <b>FLORIDA EDUCATION FOUNDATION, INC.</b> Doing Business As Number and street (or P.O. box if mail is not delivered to street address) Room/suite <b>325 W. GAINES ST., STE. 1524</b> City, town, or post office, state, and ZIP code <b>TALLAHASSEE, FL 32399</b> <b>F Name and address of principal officer: MARY LEE KIRACOFE</b> <b>SAME AS C ABOVE</b>	<b>D Employer identification number</b> <b>59-2718509</b> <b>E Telephone number</b> <b>(850) 245-9692</b> <b>G Gross receipts \$</b> <b>2,472,742.</b> <b>H(a) Is this a group return for affiliates?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b) Are all affiliates included?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) <b>H(c) Group exemption number</b> ▶
<b>I Tax-exempt status:</b> <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
<b>J Website:</b> ▶ <b>WWW.FLORIDAEDUCATIONFOUNDATION.ORG</b>		
<b>K Form of organization:</b> <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		<b>L Year of formation:</b> <b>1985</b> <b>M State of legal domicile:</b> <b>FL</b>

<b>Part I Summary</b>			
	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>RECEIVE, HOLD, INVEST AND ADMINISTER PROPERTY AND TO MAKE EXPENDITURES TO OR FOR THE BENEFIT</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
<b>Activities &amp; Governance</b>	<b>3</b> Number of voting members of the governing body (Part VI, line 1a) .....	<b>3</b>	8
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) .....	<b>4</b>	8
	<b>5</b> Total number of individuals employed in calendar year 2012 (Part V, line 2a) .....	<b>5</b>	0
	<b>6</b> Total number of volunteers (estimate if necessary) .....	<b>6</b>	12
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 .....	<b>7a</b>	0.
	<b>b</b> Net unrelated business taxable income from Form 990-T, line 34 .....	<b>7b</b>	0.
	<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h) .....	<b>Prior Year</b>
<b>9</b> Program service revenue (Part VIII, line 2g) .....		1,773,924.	1,991,739.
<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) .....		434,625.	376,183.
<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) .....		34,970.	104,820.
<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) .....		0.	0.
<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) .....		2,243,519.	2,472,742.
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) .....	110,711.	142,423.
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) .....	0.	0.
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) .....	0.	0.
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) .....	0.	0.
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>0.</b>		
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) .....	987,742.	967,166.
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) .....	1,098,453.	1,109,589.
<b>Net Assets or Fund Balances</b>	<b>19</b> Revenue less expenses. Subtract line 18 from line 12 .....	1,145,066.	1,363,153.
	<b>20</b> Total assets (Part X, line 16) .....	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26) .....	3,239,550.	4,568,243.
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20 .....	353,509.	313,183.
		2,886,041.	4,255,060.

<b>Part II Signature Block</b>			
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.			
<b>Sign Here</b>	<div style="text-align: center; font-weight: bold; font-size: 1.2em;">CLIENT COPY</div> Signature of officer <b>MARY LEE KIRACOFE, EXECUTIVE DIRECTOR</b> Type or print name and title	Date	
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>MARK JONES</b>	Preparer's signature	Date
	Firm's name ▶ <b>CARR, RIGGS &amp; INGRAM, LLC</b>	Firm's EIN ▶ <b>72-1396621</b>	Check if self-employed <input type="checkbox"/> PTIN <b>P00280681</b>
	Firm's address ▶ <b>1713 MAHAN DRIVE TALLAHASSEE, FL 32308</b>	Phone no. <b>(850) 878-8777</b>	

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III [X]

1 Briefly describe the organization's mission: THE FLORIDA EDUCATION FOUNDATION PROMOTES AND SUPPORTS ACADEMIC EXCELLENCE FOR PRE-KINDERGARTEN THROUGH 12TH GRADE STUDENTS IN FLORIDA. THE FOUNDATION RECOGNIZES OUTSTANDING TEACHERS AND EDUCATIONAL CONTRIBUTORS, DEVELOPS STRATEGIC ALLIANCES WITH BUSINESS

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 292,070. including grants of \$ 0. ) (Revenue \$ 268,365. ) CHOICE FUND ALLOCATES RESOURCES FROM PUBLIC CONTRIBUTIONS TO PROVIDE TECHNICAL ASSISTANCE TO CHARTER SCHOOL CONSTITUENTS

4b (Code: ) (Expenses \$ 11,305. including grants of \$ 0. ) (Revenue \$ 0. ) MARY E. MURDOCK ENDOWMENT FUND - SUPPORT OF THE FOUNDATION'S MISSION TO PROMOTE AND SUPPORT ACADEMIC EXCELLENCE FOR PRE-KINDERGARTEN THROUGH 12TH GRADE STUDENTS IN FLORIDA.

4c (Code: ) (Expenses \$ 35,207. including grants of \$ 0. ) (Revenue \$ 0. ) COMMON CORE STATE STANDARDS - DESIGN OF WEB-BASED TOOLS FOR STUDENTS TO PROVIDE ON-LINE SUPPORT OF THE COMMON CORE STATE STANDARDS AND TO INCREASE AWARENESS & BASIC UNDERSTANDING OF THE COMMON CORE STATE STANDARDS TO EDUCATION STAKEHOLDERS.

4d Other program services (Describe in Schedule O.) (Expenses \$ 733,194. including grants of \$ 142,423. ) (Revenue \$ 107,818. )

4e Total program service expenses 1,071,776.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> .....	<b>X</b>	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? .....	<b>X</b>	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> .....		<b>X</b>
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> .....		<b>X</b>
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i> .....		<b>X</b>
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i> .....		<b>X</b>
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> .....		<b>X</b>
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> .....		<b>X</b>
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i> .....		<b>X</b>
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> .....		<b>X</b>
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> .....		<b>X</b>
<b>b</b> Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i> .....	<b>X</b>	
<b>c</b> Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i> .....		<b>X</b>
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i> .....		<b>X</b>
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> .....	<b>X</b>	
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i> .....		<b>X</b>
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> .....	<b>X</b>	
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> .....		<b>X</b>
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> .....		<b>X</b>
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....		<b>X</b>
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i> .....		<b>X</b>
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Parts II and IV</i> .....		<b>X</b>
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Parts III and IV</i> .....		<b>X</b>
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i> .....		<b>X</b>
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> .....		<b>X</b>
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> .....		<b>X</b>
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> .....		<b>X</b>
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....		

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i> .....	X	
<b>22</b> Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....	X	
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25</i> .....		X
<b>24b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>24c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>24d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>25b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highest compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i> .....		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>28a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>28b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>28c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....	X	
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....		X
<b>35b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O .....	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V

Table with columns for question number, description, and Yes/No boxes. Includes questions 1a through 14b regarding IRS filings and tax compliance.



Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response to any question in this Part VI

X

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year; 1b Enter the number of voting members included in line 1a, above, who are independent; 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?; 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?; 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?; 5 Did the organization become aware during the year of a significant diversion of the organization's assets?; 6 Did the organization have members or stockholders?; 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?; 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?; 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body? b Each committee with authority to act on behalf of the governing body?; 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates?; 10b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?; 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?; 11b Describe in Schedule O the process, if any, used by the organization to review this Form 990.; 12a Did the organization have a written conflict of interest policy? If "No," go to line 13; 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?; 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done; 13 Did the organization have a written whistleblower policy?; 14 Did the organization have a written document retention and destruction policy?; 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?; 15a The organization's CEO, Executive Director, or top management official; 15b Other officers or key employees of the organization; 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?; 16b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed NONE
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. Own website Another's website X Upon request Other (explain in Schedule O)
19 Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: MARY LEE KIRACOFE - (850) 245-9692 325 W. GAINES ST., STE. 1524, TALLAHASSEE, FL 32399

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response to any question in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) NATHAN A. ADAMS, IV DIRECTOR	5.00	X						0.	0.	0.
(2) FRANK T. BROGAN DIRECTOR	5.00	X						0.	0.	0.
(3) STACY CARLSON DIRECTOR	5.00	X						0.	0.	0.
(4) JENNIFER GROVE DIRECTOR	5.00	X						0.	0.	0.
(5) CYNTHIA O'CONNELL EX-OFFICIO DIRECTOR	5.00	X						0.	0.	0.
(6) MARY CHANCE EX-OFFICIO DIRECTOR	5.00	X						0.	0.	0.
(7) ALVIN DAVIS EX-OFFICIO DIRECTOR	5.00	X						0.	0.	0.
(8) ALEXANDRE LOPES EX-OFFICIO DIRECTOR	5.00	X						0.	0.	0.
(9) DOMINIC CALABRO CHAIRMAN	5.00			X				0.	0.	0.
(10) JIM THOMPSON VICE-CHAIR	5.00			X				0.	0.	0.
(11) EMILY ROGERS SECRETARY	5.00			X				0.	0.	0.
(12) BRUCE O'DONOGHUE TREASURER	5.00			X				0.	0.	0.
(13) MARY LEE KIRACOFFE EXECUTIVE DIRECTOR	40.00			X				0.	71,000.	15,765.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

Table with 6 main columns: (A) Name and title, (B) Average hours per week, (C) Position (Individual trustee or director, Institutional trustee, Officer, Key employee, Highest compensated employee, Former), (D) Reportable compensation from the organization (W-2/1099-MISC), (E) Reportable compensation from related organizations (W-2/1099-MISC), (F) Estimated amount of other compensation from the organization and related organizations. Includes sub-totals for 1b, 1c, and 1d.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 0

Table with 3 columns: Question number, Question text, Yes/No columns. Contains questions 3, 4, and 5 regarding compensation reporting.

Section B. Independent Contractors

Table for Section B with 3 columns: (A) Name and business address, (B) Description of services, (C) Compensation. Includes question 1 and a sub-table for independent contractors.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

**Part VIII Statement of Revenue**

Check if Schedule O contains a response to any question in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns	<b>1a</b>					
	<b>b</b> Membership dues	<b>1b</b>					
	<b>c</b> Fundraising events	<b>1c</b>					
	<b>d</b> Related organizations	<b>1d</b>					
	<b>e</b> Government grants (contributions)	<b>1e</b>					
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1f</b> 1,991,739.					
	<b>g</b> Noncash contributions included in lines 1a-1f: \$						
	<b>h Total.</b> Add lines 1a-1f		1,991,739.				
	<b>Program Service Revenue</b>	<b>2 a</b> CONFERENCE REGISTRATIO	Business Code 900099	376,183.	376,183.		
<b>b</b>							
<b>c</b>							
<b>d</b>							
<b>e</b>							
<b>f</b> All other program service revenue							
<b>g Total.</b> Add lines 2a-2f			376,183.				
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts)		64,707.			64,707.	
	<b>4</b> Income from investment of tax-exempt bond proceeds						
	<b>5</b> Royalties						
	<b>6 a</b> Gross rents	(i) Real	(ii) Personal				
		<b>b</b> Less: rental expenses					
		<b>c</b> Rental income or (loss)					
		<b>d</b> Net rental income or (loss)					
	<b>7 a</b> Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		40,113.					
		<b>b</b> Less: cost or other basis and sales expenses	0.				
		<b>c</b> Gain or (loss)	40,113.				
	<b>d</b> Net gain or (loss)			40,113.		40,113.	
	<b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	<b>a</b>					
		<b>b</b> Less: direct expenses	<b>b</b>				
		<b>c</b> Net income or (loss) from fundraising events					
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19	<b>a</b>						
	<b>b</b> Less: direct expenses	<b>b</b>					
	<b>c</b> Net income or (loss) from gaming activities						
<b>10 a</b> Gross sales of inventory, less returns and allowances	<b>a</b>						
	<b>b</b> Less: cost of goods sold	<b>b</b>					
	<b>c</b> Net income or (loss) from sales of inventory						
<b>Miscellaneous Revenue</b>		<b>Business Code</b>					
<b>11 a</b>	<b>a</b>						
	<b>b</b>						
	<b>c</b>						
	<b>d</b> All other revenue						
	<b>e Total.</b> Add lines 11a-11d						
<b>12 Total revenue.</b> See instructions.			2,472,742.	376,183.	0.	104,820.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response to any question in this Part IX

X

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21	45,173.	45,173.		
2 Grants and other assistance to individuals in the United States. See Part IV, line 22	97,250.	97,250.		
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	233,523.	212,828.	20,695.	
12 Advertising and promotion	116.		116.	
13 Office expenses	51,872.	49,729.	2,143.	
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	68,553.	62,055.	6,498.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	610,825.	604,079.	6,746.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a MISCELLANEOUS	1,675.	60.	1,615.	
b DUES/SUBSCRIPTIONS	602.	602.		
c				
d				
e All other expenses				
<b>25 Total functional expenses.</b> Add lines 1 through 24e	<b>1,109,589.</b>	<b>1,071,776.</b>	<b>37,813.</b>	<b>0.</b>
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here  if following SOP 98-2 (ASC 958-720)

**Part X Balance Sheet**

Check if Schedule O contains a response to any question in this Part X

		(A) Beginning of year		(B) End of year	
<b>Assets</b>	1	Cash - non-interest-bearing	237,278.	1	433,564.
	2	Savings and temporary cash investments	2,989,332.	2	1,690,951.
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	12,940.	4	7,290.
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges		9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D		10a	
	b	Less: accumulated depreciation		10b	10c
	11	Investments - publicly traded securities		11	
	12	Investments - other securities. See Part IV, line 11		12	2,436,438.
	13	Investments - program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets. See Part IV, line 11		15	
16	<b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	3,239,550.	16	4,568,243.	
<b>Liabilities</b>	17	Accounts payable and accrued expenses	139,544.	17	119,525.
	18	Grants payable		18	
	19	Deferred revenue	190,662.	19	170,353.
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	23,303.	25	23,305.
	26	<b>Total liabilities.</b> Add lines 17 through 25	353,509.	26	313,183.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>				
	27	Unrestricted net assets	1,701,271.	27	2,849,334.
	28	Temporarily restricted net assets	1,184,770.	28	1,405,726.
	29	Permanently restricted net assets		29	
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>				
	30	Capital stock or trust principal, or current funds		30	
	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds		32	
33	<b>Total net assets or fund balances</b>	2,886,041.	33	4,255,060.	
34	<b>Total liabilities and net assets/fund balances</b>	3,239,550.	34	4,568,243.	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response to any question in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	2,472,742.
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,109,589.
3	Revenue less expenses. Subtract line 2 from line 1	3	1,363,153.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	2,886,041.
5	Net unrealized gains (losses) on investments	5	5,866.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	4,255,060.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response to any question in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	X	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Form 990 (2012)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

**2012**

Open to Public Inspection

Name of the organization **FLORIDA EDUCATION FOUNDATION, INC.** Employer identification number **59-2718509**

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2  A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9  An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 10  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a  Type I
  - b  Type II
  - c  Type III - Functionally integrated
  - d  Type III - Non-functionally integrated
- e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
 

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? .....	<b>11g(i)</b>	
(ii) A family member of a person described in (i) above? .....	<b>11g(ii)</b>	
(iii) A 35% controlled entity of a person described in (i) or (ii) above? .....	<b>11g(iii)</b>	
- h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
<b>Total</b>									

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule A (Form 990 or 990-EZ) 2012



**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	1,295,579.	511,999.	800,857.	1,773,924.	1,991,739.	6,374,098.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
3 The value of services or facilities furnished by a governmental unit to the organization without charge .....	175,188.	131,980.	152,493.	156,721.	148,456.	764,838.
4 <b>Total.</b> Add lines 1 through 3 .....	1,470,767.	643,979.	953,350.	1,930,645.	2,140,195.	7,138,936.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						
6 <b>Public support.</b> Subtract line 5 from line 4.						7,138,936.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4 .....	1,470,767.	643,979.	953,350.	1,930,645.	2,140,195.	7,138,936.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....	28,448.	26,304.	26,407.	34,970.	104,820.	220,949.
9 Net income from unrelated business activities, whether or not the business is regularly carried on .....						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) .....	28,671.					28,671.
11 <b>Total support.</b> Add lines 7 through 10						7,388,556.
12 Gross receipts from related activities, etc. (see instructions) .....					12	810,808.
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) .....	14	96.62 %
15 Public support percentage from 2011 Schedule A, Part II, line 14 .....	15	96.22 %
16a <b>33 1/3% support test - 2012.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization .....		<input checked="" type="checkbox"/>
b <b>33 1/3% support test - 2011.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
17a <b>10% -facts-and-circumstances test - 2012.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
b <b>10% -facts-and-circumstances test - 2011.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		<input type="checkbox"/>

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2011 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2011 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2012.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**b 33 1/3% support tests - 2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No. 1545-0047

**2012**

Name of the organization

Employer identification number

FLORIDA EDUCATION FOUNDATION, INC.

59-2718509

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( 3 ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ..... ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization <b>FLORIDA EDUCATION FOUNDATION, INC.</b>	Employer identification number <b>59-2718509</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	AT&T 208 SOUTH ADARD, SUITE 100 DALLAS, TX 75202	\$ 250,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	STATE FARM MUTUAL AUTOMOBILE INSURANCE COMPANY 3 STATE FARM PLAZA BLOOMINGTON, IL 61791	\$ 55,800.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	MACY'S FOUNDATION 7 W SEVENTH ST CINCINNATI, OH 45202	\$ 102,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
4	MARY MURDOCK TRUST DTD 10/5/99 50 S LASALLE STREET CHICAGO, IL 60603	\$ 1,038,730.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
5	FOUNDATION FOR EXCELLENCE 2620 AUGUSTINE DRIVE STE 185 SANTA CLARA, CA 95054	\$ 200,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
6	WELLS FARGO FOUNDATION 123 BROAD ST PHILADELPHIA, PA 19109	\$ 105,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Name of organization  <b>FLORIDA EDUCATION FOUNDATION, INC.</b>	Employer identification number  <b>59-2718509</b>
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	

Name of organization <b>FLORIDA EDUCATION FOUNDATION, INC.</b>	Employer identification number <b>59-2718509</b>
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**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once.) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	

**SCHEDULE D**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

▶ Attach to Form 990. ▶ See separate instructions.

OMB No. 1545-0047

**2012**

Open to Public Inspection

Name of the organization

FLORIDA EDUCATION FOUNDATION, INC.

Employer identification number

59-2718509

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate contributions to (during year) .....		
3 Aggregate grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

Preservation of land for public use (e.g., recreation or education)       Preservation of an historically important land area

Protection of natural habitat       Preservation of a certified historic structure

Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ .....

4 Number of states where property subject to conservation easement is located ▶ .....

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

Yes       No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶ .....

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ .....

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

Yes       No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

- 1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.
- b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
- (i) Revenues included in Form 990, Part VIII, line 1 ..... ▶ \$ .....
- (ii) Assets included in Form 990, Part X ..... ▶ \$ .....
- 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:
- a Revenues included in Form 990, Part VIII, line 1 ..... ▶ \$ .....
- b Assets included in Form 990, Part X ..... ▶ \$ .....

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange programs
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 2a Did the organization include an amount on Form 990, Part X, line 21?  Yes  No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

**Part V Endowment Funds.** Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment  \_\_\_\_\_ %
  - b Permanent endowment  \_\_\_\_\_ %
  - c Temporarily restricted endowment  \_\_\_\_\_ %
- The percentages in lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |                             | Yes    | No |
|-----------------------------|--------|----|
| (i) unrelated organizations | 3a(i)  |    |
| (ii) related organizations  | 3a(ii) |    |
- b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				0.



**Part VII Investments - Other Securities.** See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A) MUTUAL FUNDS	2,436,438.	END-OF-YEAR MARKET VALUE
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
(I)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.)	2,436,438.	

**Part VIII Investments - Program Related.** See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.)		

**Part IX Other Assets.** See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.)	

**Part X Other Liabilities.** See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) DUE TO RECIPIENT	23,305.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.)	23,305.

2. FIN 48 (ASC 740) Footnote. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

<b>1</b>	Total revenue, gains, and other support per audited financial statements	<b>1</b>	2,627,064.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
<b>a</b>	Net unrealized gains on investments	<b>2a</b>	5,866.
<b>b</b>	Donated services and use of facilities	<b>2b</b>	148,456.
<b>c</b>	Recoveries of prior year grants	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	154,322.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	2,472,742.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	0.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)	<b>5</b>	2,472,742.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

<b>1</b>	Total expenses and losses per audited financial statements	<b>1</b>	1,258,045.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
<b>a</b>	Donated services and use of facilities	<b>2a</b>	148,456.
<b>b</b>	Prior year adjustments	<b>2b</b>	
<b>c</b>	Other losses	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	148,456.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	1,109,589.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	0.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)	<b>5</b>	1,109,589.

**Part XIII Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

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Name of the organization

**FLORIDA EDUCATION FOUNDATION, INC.**

**Employer identification number  
59-2718509**

**Part I General Information on Grants and Assistance**

**1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  **Yes**  **No**

**2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section if applicable	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of non-cash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of non-cash assistance	<b>(h)</b> Purpose of grant or assistance
EDUCATIONAL FOUNDATION OF LAKE COUNTY - 910 E DIXIE AVENUE - LEESBURG, FL 34748	59-2764174	501(C)(3)	14,404.	0.			GENERAL
SANTA ROSA SCHOOL DISTRICT 5086 CANAL ST MILTON, FL 32570			6,968.	0.			GENERAL
NASSAU COUNTY SCHOOL BOARD 1201 ATLANTIC AVENUE FERNANDINA BEACH, FL 32034			12,000.	0.			GENERAL

**2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **3.**

**3** Enter total number of other organizations listed in the line 1 table

**LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

**Schedule I (Form 990) (2012)**

**Part II** Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
TEACHER OF THE YEAR AWARD	72	97,250.	0.		

**Part IV** Supplemental Information. Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

SCHEDULE I, PART I, LINE 2: THE RECIPIENT IS PROVIDED AN AWARD BASED ON THEIR SERVICE AND THERE ARE NO RESTRICTIONS ON WHAT THE FUNDS CAN BE USED FOR.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
▶ Attach to Form 990 or 990-EZ.

OMB No. 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization

FLORIDA EDUCATION FOUNDATION, INC.

Employer identification number  
59-2718509

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

OF PUBLIC PRE-KINDERGARTEN THROUGH 12TH GRADE EDUCATION IN FLORIDA FOR  
THE PURPOSE OF ENHANCING EDUCATION EXCELLENCE IN THE PUBLIC SCHOOLS OF  
FLORIDA.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ORGANIZATIONS AND ADVANCES STATEWIDE EDUCATIONAL INITIATIVES

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

VARIOUS MISCELLANEOUS PROGRAM FUNDS.

EXPENSES \$ 733,194. INCLUDING GRANTS OF \$ 142,423. REVENUE \$ 107,818.

FORM 990, PART VI, SECTION B, LINE 11: FORM 990 IS REVIEWED BY THE  
TREASURER BEFORE FILING.

FORM 990, PART VI, SECTION C, LINE 19: ORGANIZATION PROVIDES GOVERNING  
DOCUMENTS AND FINANCIAL STATEMENTS UPON REQUEST.

FORM 990, PART IX, LINE 11G, OTHER FEES:

PROFESSIONAL FEES :

PROGRAM SERVICE EXPENSES 212,828.

MANAGEMENT AND GENERAL EXPENSES 20,695.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 233,523.

TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A 233,523.

Name of the organization

FLORIDA EDUCATION FOUNDATION, INC.

Employer identification number

59-2718509

FORM 990, PART XII, LINE 2C

THERE HAVE BEEN NO CHANGES.

Multiple horizontal lines for additional text entry.







**Part V Transactions With Related Organizations** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34, 35b, or 36.)

**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
<b>a</b> Receipt of (i) interest (ii) annuities (iii) royalties or (iv) rent from a controlled entity		X
<b>b</b> Gift, grant, or capital contribution to related organization(s)		X
<b>c</b> Gift, grant, or capital contribution from related organization(s)		X
<b>d</b> Loans or loan guarantees to or for related organization(s)		X
<b>e</b> Loans or loan guarantees by related organization(s)		X
<b>f</b> Dividends from related organization(s)		X
<b>g</b> Sale of assets to related organization(s)		X
<b>h</b> Purchase of assets from related organization(s)		X
<b>i</b> Exchange of assets with related organization(s)		X
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s)		X
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s)		X
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s)		X
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s)		X
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)		X
<b>o</b> Sharing of paid employees with related organization(s)		X
<b>p</b> Reimbursement paid to related organization(s) for expenses		X
<b>q</b> Reimbursement paid by related organization(s) for expenses		X
<b>r</b> Other transfer of cash or property to related organization(s)		X
<b>s</b> Other transfer of cash or property from related organization(s)		X

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of other organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) FLORIDA DEPARTMENT OF EDUCATION	O	148,456	FAIR MARKET VALUE
(2)			
(3)			
(4)			
(5)			
(6)			





• If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box  **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

• If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).**

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions  <b>FLORIDA EDUCATION FOUNDATION, INC.</b>	Employer identification number (EIN) or  <b>59-2718509</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>C/O 1713 MAHAN DRIVE</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>TALLAHASSEE, FL 32308</b>	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 1

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**MARY LEE KIRACOFÉ**

• The books are in the care of **▶ 325 W. GAINES ST., STE. 1524 - TALLAHASSEE, FL 32399**

Telephone No. **▶ (850) 245-9692** FAX No. **▶**

• If the organization does not have an office or place of business in the United States, check this box

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) **\_\_\_\_\_**. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **MAY 15, 2014**

5 For calendar year **\_\_\_\_\_**, or other tax year beginning **JUL 1, 2012**, and ending **JUN 30, 2013**

6 If the tax year entered in line 5 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

7 State in detail why you need the extension  
**TAXPAYER NEEDS ADDITIONAL TIME TO GATHER INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.**

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$	0.
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b>	\$	0.
<b>c</b> <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$	0.

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **▶** \_\_\_\_\_ Title **▶ CPA** Date **▶** \_\_\_\_\_

The purpose of the Foundation is to support the comprehensive mission of the Florida College System and its students as defined in Section 1004.71, Florida Statutes.

**Goal 1** INCREASE STUDENT SUPPORT  
Scholarships, Books, Technology, and other support programs

Double the endowments for student support and prioritize student completion with these funds.

- Organize and prepare for increased fundraising
- Utilize scholarship criteria to prioritize funds for student completion
- Secure gifts to fund student support in specific areas such as baccalaureate degree students, teaching, IT, healthcare fields, dual enrollment, international programs, and developmental education

**Goal 2** INCREASE SYSTEM SUPPORT  
Grants, Programs, Marketing, and support for Division, Chancellor, Institutions and Faculty

Double system support through increased grants and programs

- Organize and prepare for additional grant writing
- Revive unfunded grant proposals and find a new funder or partner
- Pursue additional state settlement funds
- Pursue funds for startup or expansion of programs aligned with state workforce needs

**Goal 3** ORGANIZATIONAL GROWTH TO REFLECT SYSTEM GROWTH  
Board Development and Growth; Staff Expansion

Expand the role of the FCSF board and add five new board members, who bring specific skills or influence with potential funders. Increase coordination with the FCS stakeholder groups and increase FCSF staff as funding allows.

- Define the role and expectation of board members
- Achieve diversity of race/gender, geographic representation
- Align new board members with targeted industry sectors for potential funding
- Establish a Leadership Council or "Chancellor's Circle of funders or industry leaders who know funders

The purpose of the Foundation is to support the comprehensive mission of the Florida College System and its students as defined in Section 1004.71, Florida Statutes

Priorities	Goals	Strategies	Action
<b>1. STUDENT SUPPORT (scholarships)</b>			
	Expand Student Scholarships through increased donations	organization and preparation for increased fundraising	statewide donor list by targeted industries
			develop collateral material for use in fundraising
		secure gifts to fund scholarships in specific areas such as baccalaureate degree students, teaching, IT, other healthcare fields	
<b>2. SYSTEM SUPPORT (grants, programs)</b>			
	Expand systemwide support through increased grants and programs	organize and prepare for additional grant writing	coordinate with local college grant writers
		revive SmartNet proposal and find a new funder or partner	
		pursue additional state settlement funds	AG/CFO meetings
		pursue funds for startup or expansion of programs aligned with state workforce needs	
<b>3. ORGANIZATIONAL GROWTH TO REFLECT THE GROWTH OF THE FCS (board development, etc)</b>			

The purpose of the Foundation is to support the comprehensive mission of the Florida College System and its students as defined in Section 1004.71, Florida Statutes

Priorities	Goals	Strategies	Action
	increase number of board member (25 is max)	achieve diversity of race/gender, geographic representation	
		attract additional high profile or influential board members	
		align new board members with targeted industry sectors for potential funding	
	increase the role of board members	define the role and expectation of board members	
	Establish a Leadership Council or Chancellor's Council	Consist of funders or friends of funders	
		create additional working committees of the board	fundraising committee
		increase the number of in person board meetings	2-3 per year
	increase coordination with the FCS stakeholder groups	Attend COP meetings, AFC convention	
		coordinate marketing efforts with COP/AFC	
		increase awareness opportunities with statewide groups (AIF, C100, FCoC)	
	Increase FCSF staff as funding allows		



Conflict of Interest Policy

As a nonprofit corporation, the proper governance of The Florida College System Foundation depends on the active participation of volunteer Board Members who freely donate their time and talents for the benefit of The Florida College System Foundation. The Foundation is aware; however, that this service may occasionally result in situations involving a dual interest on the part of one or more members of the Board of Directors that might be interpreted as a conflict of interest.

The Florida College System Foundation recognizes that it is inherent in the process of selection of members of the Board of Directors that they are and will continue to be active in the community and those dualities of interest will necessarily occur because of their varied interests and backgrounds. However, the Foundation believes that its Board should not be inhibited solely because of dualities of interest that might be interpreted as conflicts of interest. In fact, the Foundation believes that the matter of dualities of interest can best be handled through full disclosures of such interests, together with noninvolvement in any vote wherein such an interest may be relevant.

In light of this, the following policy is established:

1. Any duality of interest on the part of any member of the Board of Directors and/or staff member shall be disclosed to the other members of the Board.
2. When a member of the Board of Directors has a duality of interest which he or she reasonably believes is relevant to any matter before the Board or one of its committees, he or she shall call such interest to the attention of the Chairman of the Board or President of the Foundation. Such Director shall not vote on that matter and shall not use his or her personal influence in the discussion of the matter. However, any Director who is excluded from voting pursuant to this policy may briefly state his or her position on the matter and answer pertinent questions of other Directors when the member's knowledge regarding the matter will assist the board or committee.
3. The minutes of the meeting shall reflect that the Director having a duality of interest disclosed the name and that he or she abstained from voting on the matter.
4. A copy of this policy shall be furnished to any person who is or becomes a member of the Board of Directors of the Foundation and such Director will acknowledge, in writing, his or her receipt and understanding of the policy.

I acknowledge that I have received, read and understand this Florida College System Foundation, Inc., "Policy on Conflict of Interest."

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print or type name



## Code of Ethics Policy

The Board of Directors of The Florida College System Foundation, Inc. (Foundation) requires ethical conduct of all members of the Board (Directors). Each Director holds an important and elevated role in assuring that the highest standards of ethical practice are implemented in support of the Foundation's mission.

*The purpose of The Florida College System Foundation is to support the comprehensive mission of the Florida College System and its students as defined in Section 1004.71, Florida Statute.*

As a member of The Florida College System Foundation, Inc. Board of Directors, I verify that:

(1) I have received a copy of the Conflicts of Interest Statement and that I will follow the Code of Ethics as defined by The Florida Statutes, Title X, and Chapter 112.

(2) I will formally and promptly communicate any potential conflict to the Foundation Board Chair, the Chancellor and the President of the Florida College System Foundation.

(3) I will act at all times with honesty, integrity and independence, avoiding actual or apparent conflicts of interest in personal and professional relationships and expect and encourage such conduct by other Directors.

(4) I will comply with all applicable rules and regulations of federal, state, and local governments and other appropriate private and public regulatory agencies.

(5) I will comply with the Foundation's policies and procedures, and contribute constructively to their ongoing evaluation and reformulation.

(6) I will act in good faith, responsibly, with due care, competence, and diligence, and without knowingly misrepresenting material facts or allowing my independent judgment to be subordinated.

(7) I will protect and respect the confidentiality of information acquired in the course of my membership on the Board except when authorized or otherwise legally obligated to disclose. Confidential information acquired in the course of my membership on the Board shall not be used for personal advantage.

(8) I will responsibly use and control assets and other resources entrusted to me.

By signing this statement, I acknowledge that I have read, understand, and agree to adhere to this Ethics Statement. Violation of this Statement may be grounds for removal from the Board as provided in the Bylaws of the Foundation.

---

Signature

---

Printed Name

---

Title

---

Date

New Policy

**Carroll and Company, CPAs  
2640-A Mitcham Drive  
Tallahassee, FL 32308  
850-877-1099**

**Filing Instructions**

**THE FLORIDA COLLEGE SYSTEM  
FOUNDATION, INC.**

**Exempt Organization Tax Return**

**Taxable Year Ended June 30, 2013**

**Date Due:** May 15, 2014

**Remittance:** None is required. Your Form 990 for the tax year ended 6/30/13 shows no balance due.

**Signature:** You are using a Personal Identification Number (PIN) for signing your return electronically. Sign the IRS e-file Authorization and mail it as soon as possible to:

Carroll and Company, CPAs  
2640-A Mitcham Drive  
Tallahassee, FL 32308

**Other:** Initial and date the copies of the IRS e-file Signature Authorization and the Form 990. Retain them for your records.

Your return is being filed electronically with the IRS and is not required to be mailed. Mailing a paper copy of your return to the IRS will delay the processing of your return.

**CLIENTS COPY**

Form **8879-EO**

### IRS e-file Signature Authorization for an Exempt Organization

OMB No. 1545-1878

For calendar year 2012, or fiscal year beginning 7/01, 2012, and ending 6/30, 20 13

# 2012

Department of the Treasury  
Internal Revenue Service

▶ Do not send to the IRS. Keep for your records.

Name of exempt organization

**THE FLORIDA COLLEGE SYSTEM  
FOUNDATION, INC.**

Employer identification number

**65-0530384**

Name and title of officer

**JUDY GREEN  
PRESIDENT**

#### Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. Do not complete more than 1 line in Part I.

1a	Form 990 check here	▶ <input checked="" type="checkbox"/>	b	Total revenue, if any (Form 990, Part VIII, column (A), line 12)	1b	<u>3,440,431</u>
2a	Form 990-EZ check here	▶ <input type="checkbox"/>	b	Total revenue, if any (Form 990-EZ, line 9)	2b	
3a	Form 1120-POL check here	▶ <input type="checkbox"/>	b	Total tax (Form 1120-POL, line 22)	3b	
4a	Form 990-PF check here	▶ <input type="checkbox"/>	b	Tax based on investment income (Form 990-PF, Part VI, line 5)	4b	
5a	Form 8868 check here	▶ <input type="checkbox"/>	b	Balance Due (Form 8868, Part I, line 3c or Part II, line 8c)	5b	

#### Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2012 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

I authorize Carroll and Company, CPAs to enter my PIN 7777 as my signature  
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2012 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2012 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶

Date ▶ 04/24/14

#### Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

**5920257777**  
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2012 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶

Date ▶

7-27-17

**ERO Must Retain This Form—See Instructions**

**Do Not Submit This Form To the IRS Unless Requested To Do So**

For Paperwork Reduction Act Notice, see back of form.

Form **8879-EO** (2012)

Form **990**

Department of the Treasury  
Internal Revenue Service

# Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)  
▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No. 1545-0047

**2012**

Open to Public Inspection

**A** For the 2012 calendar year, or tax year beginning **07/01/12**, and ending **06/30/13**

- B** Check if applicable:
- Address change
  - Name change
  - Initial return
  - Terminated
  - Amended return
  - Application pending

**C** Name of organization **THE FLORIDA COLLEGE SYSTEM FOUNDATION, INC.**

Doing Business As

Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
**FL DEPT EDUCATION P.O. DRAWER 10503**

City, town or post office, state, and ZIP code  
**TALLAHASSEE FL 32302-0503**

**D** Employer identification number  
**65-0530384**

**E** Telephone number  
**850-245-9494**

**G** Gross receipts \$ **14,482,951**

**F** Name and address of principal officer:  
**JUDY GREEN**  
**FL DEPT EDUCATION P.O. DRAWER 10503**  
**TALLAHASSEE FL 32302-0503**

**H(a)** Is this a group return for affiliates?  Yes  No

**H(b)** Are all affiliates included?  Yes  No  
If "No," attach a list. (see instructions)

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: ▶ **www.fl DOE.org/fsc/foundation**

**H(c)** Group exemption number ▶

**K** Form of organization:  Corporation  Trust  Association  Other ▶

**L** Year of formation: **1994** **M** State of legal domicile: **FL**

### Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: <b>THE PURPOSE OF THE FOUNDATION IS TO FINANCIALLY SUPPORT THE FULL MISSION OF THE FLORIDA COLLEGE SYSTEM AND ITS STUDENTS.</b>		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	21	
	4	21	
	5	0	
	6	0	
	7a	0	
Revenue	8 Contributions and grants (Part VIII, line 1h)	64,808	1,094,600
	9 Program service revenue (Part VIII, line 2g)	51,765	45,385
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	769,412	2,300,446
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		0
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	1,585,985	3,440,431
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	997,918	1,384,033
Expenses	14 Benefits paid to or for members (Part IX, column (A), line 4)		0
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		0
	16a Professional fundraising fees (Part IX, column (A), line 11e)		0
	b Total fundraising expenses (Part IX, column (D), line 25) ▶	0	
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	287,778	512,542
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	1,285,696	1,896,575
Net Assets or Fund Balances	19 Revenue less expenses. Subtract line 18 from line 12	300,289	1,543,856
	20 Total assets (Part X, line 16)	18,526,552	20,423,028
	21 Total liabilities (Part X, line 26)	0	0
	22 Net assets or fund balances. Subtract line 21 from line 20	18,526,552	20,423,028

CLIENT COPY

### Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here** Signature of officer: **JUDY GREEN** Date: \_\_\_\_\_  
Type or print name and title: **PRESIDENT**

**Paid Preparer Use Only**

Print/type preparer's name: **Frederick Carroll III** Preparer's signature: *[Signature]* Date: **04/24/14** Check  if self-employed PTIN: **P00076144**

Firm's name: **Carroll and Company, CPAs** Firm's EIN: **59-3038528**

Firm's address: **2640-A Mitcham Drive Tallahassee, FL 32308** Phone no.: **850-877-1099**

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

**BLIND SERVICES FOUNDATION OF FLORIDA, INC.**  
**`ENABLING THE BLIND`**  
**State of Florida Direct Support Organization Annual Report**  
**Fiscal Year 2013-2014**

**325 W. Gaines St. Room 1114,**  
**Turlington Building,**  
**Tallahassee, Florida 32399**  
**1-800-342-1828**  
[www.blindservicesfoundation.org](http://www.blindservicesfoundation.org)

The Blind Services Foundation of Florida, Inc., is a not-for-profit corporation created by the Florida Legislature in 2004 under s. 413.0111 F.S., The purpose of the Foundation is to raise funds to support services provided by the Florida Department of Education (FDOE), Florida Division of Blind Services (FDBS). One source of funding is through the sale of a specialized motorcycle tag called "Bikers Care". The Foundation also receives donations from individuals and corporations.

The Florida Division of Blind Services has received the Blind Services Foundation of Florida Annual Report. The Florida Division of Blind Services rationale to continue the Blind Services Foundation of Florida, Inc., is that the foundation:

- Maintains its mission and is focused on a strategic plan that is closely aligned with the priorities of the FDBS;
- Serves as an efficient fiscal agent for statewide initiatives and developmental projects for the benefit of blind and/or visually impaired Floridians through fundraising and direct support of advocacy groups;
- Exhibits sound fiscal management which is documented in its annual outside audit;
- Is an effective vehicle for cultivating meaningful partnerships between the FDBS and other stakeholders; and
- Is actively engaged in developing and successfully executing innovative programs such as the Biker's Care Tag initiative and supports the efforts of the FDBS regarding services to support the blind and/or visually impaired community.

*Pursuant to SB 1194, by August 1 of each year, a citizen support organization or direct support organization created or authorized pursuant to law or executive order and created, approved, or administered by an agency, shall submit an annual report to the appropriate agency.*

The Blind Services Foundation of Florida, Inc., serves Florida's blind citizens with intensity. Our efforts are to use funds of the Foundation to support programs of the FDBS; and to conduct programs and activities, and initiate developmental projects for the benefit of citizens of Florida who are blind and/or visually impaired.

Over the last three years, the Blind Services Foundation of Florida, Inc., has accomplished the following initiatives:

- The development and launch of an informative and active website.
- Publishing and disbursement of brochures.
- Secured twenty percent to the Blind Services Foundation from the sale of motorcycle specialty license plates (Florida.320.08068).
- 2011-2012 Awarded \$2,691 to 12 Blind Babies Programs in Florida for a total of \$32,292.
- 2012-2013 Awarded \$4,343.27 to FDBS for grants for special projects.
- 2013-2014 Awarded \$53,861.19 to FDBS for outreach to potential clients.
- Maintaining a board of 7 members.

From its strategic planning sessions in March and April of 2014, the Blind Services Foundation of Florida, Inc., Board of Directors determined that it will advance efforts for the foundations three year plan to:

- Increase recognition of the Bikers Care Tag and the direct participation of the biker community via new marketing initiatives;
- Provide support to encourage, challenge, motivate and recruit people, organizations and other not for profit organizations to support the FDBS as they serve Florida's blind citizens with shrinking resources and exploding senior populations;
- Develop strategic planning to identify a statewide need for further needs assessments as they relate to services and funding;
- Continue to help with communication and messaging of the FDBS and determine what level of support is appropriate for development; and
- Work with the Education Commissioner to determine the viability of the Biker's Care Tag initiative.

The Code of Ethics for the Blind Services Foundation of Florida, Inc., is as follows:

- No member of the board or any employee of the corporation shall have any financial interest, direct or indirect, with any firm engaged in business transactions for the corporation, unless fully disclosed and approved by a majority.
- No member of the Board or any employee of the corporation shall request, solicit, demand, accept, receive or agree to receive any gift, favor, service, or other thing of value from any individual or firm transacting business under the supervision or regulation of the corporation.
- No member of the board or employee of the corporation shall be prohibited from accepting citations or awards given in recognition of public services.
- No member shall participate in any form of dishonesty, fraud or misrepresentation.
- Every member shall strive to maintain high standards of performance at all times.

BLIND SERVICES FOUNDATION OF FLORIDA, INC.

BY-LAWS

Adopted December, 2004

Revised & Adopted

ARTICLE I: CORPORATION

Section 1. The name of the Corporation shall be the BLIND SERVICES FOUNDATION OF FLORIDA, INC, incorporated under the not-for-profit laws of the State of Florida.

Section 2. Fiscal Year: The fiscal year of the Corporation shall commence on the first day of July and end on the thirtieth day of the following June.

Section 3. Operations: The Board of Directors shall perform the following duties:

- A. Approve an annual budget;
- B. Develop policies and procedures and annually review them;
- C. Design, approve, initiate, and fund special programs and projects for the benefit of blind persons in Florida;
- D. Raise funds;
- E. Request and receive grants, gifts, and bequests of money;
- F. Acquire, receive, hold, invest, and administer, in its own name, securities, funds, objects of value, or other property, real or personal; and
- G. Otherwise serve to fulfill the mission of the Foundation.

ARTICLE II: PURPOSE AND MISSION

The Board of Directors shall adhere to the purposes and missions set forth in the Articles of Incorporation and Chapter 413.0111 Florida Statutes.

ARTICLE III: BOARD OF DIRECTORS

Section 1. **Composition:**

- A. The Board of Directors shall be self-appointing and the number of Board members shall be determined by the Board.
- B. The Director of the Division of Blind Services, or his or her designee, shall serve as a non-voting ex-officio member of the Board and all



committees.

- C. The Board of Directors may create additional positions. The additional positions shall be voting members of the Board. A written resume of a prospective new Board member must be submitted to the Chair, and then circulated to the Board at least 30 days prior to the Board meeting when an election is to be held. A Board member may request additional documentation through the Chair prior to the meeting.

Section 2. **Vacancies:** In the event of a vacancy on the Board, the remaining members of the Board shall elect a new member to fulfill the remainder of the term vacated, and the elected Board member shall assume the position immediately upon election.

Section 3. **Election:** As the term of each Director expires, the Board of Directors shall elect a successor for a term of four (4) years. Directors whose terms expire shall be eligible to succeed themselves.

Section 4. **Compensation:** No Director shall be compensated monetarily or in any form for serving on the Board of Directors except that reasonable expenses incurred on behalf of the Corporation shall be reimbursed upon submission of proper documentation. When calculating reimbursements to Board members and employees of the Foundation, the Corporation shall use the reimbursement schedule pursuant to Chapter 112.061 Florida Statutes.

Section 5. **Public Meetings and Public Records:** The members of the Board of Directors shall observe the Florida Sunshine Law, Chapter 286.011, Florida Statutes.

#### ARTICLE IV: OFFICERS

Section 1. The **officers** of the Board shall be a Chair, Vice Chair, Secretary, and Treasurer, each of whom shall be elected from among the members of the Board for a term of two (2) years, unless sooner removed by the Board of Directors. Each officer shall hold office until his/her successor shall be elected and qualified. The officers of the Board shall be elected every two years in odd-numbered years at the annual meeting of the Board, and shall take office at the next regular meeting. If any office becomes vacant, the Board shall elect a successor to fill the unexpired term of the vacated office.

Section 2. The **Chair** shall perform or cause to be performed the following duties:

- A. Preside at all meetings of the Board;

- B. Execute all contracts as required on authority of and in the name of the Board;
- C. Appoint the members of and serve as ex-officio voting member of all committees of the Board;
- D. Shall be one of the officers authorized to sign checks, drafts and contracts on behalf of the Corporation;
- E. Transmit the annual report of the Board to the Director of the Division of Blind Services and shall have such other duties and powers as directed by the Board of Directors; and
- F. In the absence, resignation, disqualification, or disability of the Chair, or at his/her direction, the Vice-Chair shall become the Chair. The line of succession of the officers to the Chair shall be the Vice-Chair, Secretary, and Treasurer.

Section 3. The **Vice-Chair** shall perform or cause to be performed the following duties:

- A. In the absence of the Chair, become the Chair, with all the duties, rights, privileges, and powers as the duly elected Chair of the Board; and
- B. Shall be one of the officers authorized to sign checks, drafts and contracts on behalf of the Corporation.

Section 4. The **Secretary** shall perform or cause to be performed the following duties:

- A. Record the minutes of all meetings;
- B. Ensure that all books, reports, documents and certificates as required by law are properly filed, maintained or secured, including the annual report submitted to the Director of the Division of Blind Services, as required by legislation;
- C. Maintain the corporate seal and records of the Corporation, serving as official custodian;
- D. Give and serve all notices to the Directors of the Corporation;
- E. May be one of the officers authorized to sign checks, drafts and contracts of the Corporation; and
- F. Attend to correspondence of the Corporation and exercise all duties incident to the office of Secretary.

Section 5. The **Treasurer** shall be the Chair of the Finance Committee and shall perform or cause to be performed the following duties:

- A. Have care and custody of all monies belonging to the Corporation and is responsible for such monies or securities of the Corporation;

- B. Assure that regular and timely deposits are made in operating accounts of the Corporation and that invoices and bills are paid in a timely manner;
- C. Render accessible written reports of the finances of the Corporations to the Board of Directors at every regular meeting of the Board, or as requested by the Chair; such report shall be physically affixed to the minutes of such meetings;
- D. In conjunction with the Chair, shall be the liaison to all financial institutions and all beneficiaries of the Foundation, as directed by the Board;
- E. Recommend to the Board an auditor to perform an annual audit; the Board may utilize its discretion in the selection of an auditor; and,
- F. Will be one of the officers authorized to sign checks, drafts and contracts of the Corporation.

Section 6. Any of said officers may be removed from office for malfeasance in office or conduct prejudicial to the Corporation's interest by a vote of not less than two-thirds of the whole membership, excluding vacant seats, of the Board of Directors at any regular or special meeting of the Board; provided, however, that any officer so sought to be removed shall be given not less than ten business days' notice in writing of the charges to be proffered against him/her, and shall be given an opportunity to refute the same before the Board.

## ARTICLE V: FUNDS OF THE CORPORATION

Section 1. The following rules shall be observed in the handling of funds of the Corporation:

- A. The Corporation shall maintain donations and direct service expenditures in a bank account outside of the state treasury;
- B. Any authorized administrative costs of naming and promoting the purposes of the Corporation must be paid by private funds;
- C. Funds designated for the Corporation must be used for operating expenses of the Foundation, and for special programs and projects for the benefit of blind persons in Florida; and
- D. All monies received by the Corporation must be deposited into an account of the Corporation, and must be used by the Corporation in a manner consistent with the purposes and mission of the Corporation.

Section 2. The Corporation shall comply with the audit requirements of Section 215.981 Florida Statutes. The Board shall establish an audit policy.

## ARTICLE VI: MEETINGS

Section 1. **Regular Meeting:** The Board of Directors shall meet three times per year. Meetings will be held via conference calls or face to face. The meeting dates for the following year shall be set at the last board meeting of the year. All decisions shall be by majority vote of the members present, except for removal of an officer under Article IV and the By-Laws, under Article X. The date, time, venue or method of regular meetings shall be designated by the Chair and/or the Board.

Section 2. **Special Meetings:** Special meetings of the Board of Directors may be called by the Chair. The notice of the meeting must include the purpose for which the meeting is called and the meeting must be dedicated only to the special purpose for which the meeting is called, unless by unanimous vote, other issues are included on the agenda. All such meetings shall be in compliance with the Florida Sunshine Law, Chapter 286.011, Florida Statutes and the Florida Public Records Law, Chapter 119, Florida Statutes.

Section 3. **Quorum:** A quorum shall consist of a majority of the Board. If a vacancy occurs then a quorum shall consist of a majority of eligible voting members. If at any meeting, less than a quorum is present, the members present or a majority of them may adjourn the meeting to another time and/or place.

Section 4. **"Roberts Rules of Order, Revised":** "Roberts Rules of Order, Revised", shall be followed in conducting the meetings of the Board unless otherwise provided by the Board.

Section 5. **Voting:** No member of the Board who is present at any meeting at which an official decision, ruling, or other official act is to be taken or adopted may abstain from voting in regard to any such decision, ruling, or act. A vote shall be recorded or counted for each such member present, except when, with respect to any such member, there is, or appears to be a possible conflict of interest under the provisions of Section 112.311, Section 112.313, or Section 112.3143 Florida Statute. In such cases, said member shall comply with the disclosure requirements of Section 112.3143 Florida Statutes. Voting by proxy is prohibited for all meetings of the Board of Directors.

Section 6. **Agenda and Notice** of meetings, workshops, virtual meetings,

and emergency meetings: Agenda and notice requirements for meetings, workshops, virtual meetings and emergency meetings shall be prescribed in the Rules of the Administration Commission Model Rules of Procedure, Chapter 28-102 entitled "Agenda and Scheduling of Meetings and Workshops" and Chapter 28-109 entitled "Conducting Proceedings by Communications Media Technology".

Section 7. **Absences:** Each Director is expected to attend regular and special meetings. Directors should inform the Chair if they will be unable to attend meetings. If a member misses three (3) consecutive regular or special meetings of the Board, the member may be deemed to have resigned his/her position on the Board, unless a majority of the members deem otherwise due to special circumstances.

#### ARTICLE VII: COMMITTEES

The Chair and/or the Board may create standing or ad hoc committees that do not have Board authority.

#### ARTICLE VIII: CONFLICT OF INTEREST

Section 1. No member of the Board or any employee of the Corporation shall have any financial interest, direct or indirect, with any firm engaged in business transactions for the Corporation, unless fully disclosed and approved by a majority.

Section 2. No member of the Board or any employee of the Corporation shall request, solicit, demand, accept, receive or agree to receive any gift, favor, service, or other thing of value from any individual or firm transacting business under the supervision or regulation of the Corporation.

Section 3. No member of the Board or employee of the Corporation shall be prohibited from accepting citations or awards given in recognition of public services.

#### ARTICLE IX: GOVERNING AUTHORITY

The most recent edition of "Roberts Rules of Order" shall be the parliamentary authority for the Corporation, provided that, in the event there is any conflict with "Roberts Rules of Order" and the Articles of Incorporation, these By-Laws or any state statute or duly promulgated rule

of a state agency, the latter shall prevail.

#### ARTICLE X: AMENDMENTS

These By-Laws may be altered, amended, repealed, or added to by a majority vote of all eligible voting members of the Board of Directors. Proposed amendments shall be submitted to the Board of Directors not less than thirty (30) days prior to a meeting scheduled for vote on the amendments or changes to the By-Laws.

#### ARTICLE XI: DISSOLUTION

Section 1. Dissolution of the Corporation shall be determined by a majority vote of all eligible voting members of the Board of Directors.

Section 2. In the event of dissolution of the Corporation, after paying or making provision for the payment of all known liabilities of the Corporation, the Board of Directors shall distribute the residual assets of the Corporation to the Division as provided in Section 413.0111 Florida Statutes.

#### SECRETARY'S CERTIFICATION

This is to certify that the foregoing are the amended and restated By-Laws of the Blind Services Foundation of Florida, Inc. have been duly adopted by the Board of Directors at a meeting held on March 6, 2013.

Print Name: Sheryl Brown, Secretary

Signature: \_\_\_\_\_

Form **990-EZ**

**Short Form  
Return of Organization Exempt From Income Tax**

OMB No. 1545-1150

**2012**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)**

▶ Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions). All other organizations with gross receipts less than \$200,000 and total assets less than \$500,000 at the end of the year may use this form.  
▶ *The organization may have to use a copy of this return to satisfy state reporting requirements.*

**A** For the 2012 calendar year, or tax year beginning Jul 1, 2012, and ending Jun 30, 2013

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Terminated  
 Amended return  
 Application pending

**C** Name of organization Blind Services Foundation of Florida, Inc  
 Number and street (or P.O. box, if mail is not delivered to street address) 325 W Gaines St Turlington Bldg Room/suite 1114  
 City or town, state or country, and ZIP + 4 Tallahassee FL 32399

**D** Employer identification number 55-0888147  
**E** Telephone number (850) 245-0392  
**F** Group Exemption Number ..... ▶

**G** Accounting Method:  Cash  Accrual Other (specify) \_\_\_\_\_

**H** Check  if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

**I** Website: www.floridablindservices.org

**J** Tax-exempt status (check only one) —  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**K** Check  if the organization is not a section 509(a)(3) supporting organization or a section 527 organization and its gross receipts are normally not more than \$50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions). But if the organization chooses to file a return, be sure to file a complete return.

**L** Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, line 25, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. . . . . ▶ \$ 60,671.

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)  
 Check if the organization used Schedule O to respond to any question in this Part I

		1	2	3	4	5a	5b	5c	6a	6b	6c	6d	7a	7b	7c	8	9	10	11	12	13	14	15	16	17	18	19	20	21				
REVENUE	<b>1</b> Contributions, gifts, grants, and similar amounts received . . . . .																																
	<b>2</b> Program service revenue including government fees and contracts . . . . .																																
	<b>3</b> Membership dues and assessments . . . . .																																
	<b>4</b> Investment income . . . . .																																
	<b>5 a</b> Gross amount from sale of assets other than inventory . . . . .																																
	<b>b</b> Less: cost or other basis and sales expenses . . . . .																																
	<b>c</b> Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .																																
	<b>6</b> Gaming and fundraising events																																
	<b>a</b> Gross income from gaming (attach Schedule G if greater than \$15,000) . . . . .																																
	<b>b</b> Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000) . . . . .																																
<b>c</b> Less: direct expenses from gaming and fundraising events . . . . .																																	
<b>d</b> Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c) . . . . .																																	
<b>7 a</b> Gross sales of inventory, less returns and allowances . . . . .																																	
<b>b</b> Less: cost of goods sold . . . . .																																	
<b>c</b> Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) . . . . .																																	
<b>8</b> Other revenue (describe in Schedule O) . . . . .																																	
<b>9 Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 . . . . . ▶																																	
<b>10</b> Grants and similar amounts paid (list in Schedule O) . . . . .																																	
<b>11</b> Benefits paid to or for members . . . . .																																	
<b>12</b> Salaries, other compensation, and employee benefits . . . . .																																	
<b>13</b> Professional fees and other payments to independent contractors . . . . .																																	
<b>14</b> Occupancy, rent, utilities, and maintenance . . . . .																																	
<b>15</b> Printing, publications, postage, and shipping . . . . .																																	
<b>16</b> Other expenses (describe in Schedule O) . . . . .																																	
<b>17 Total expenses.</b> Add lines 10 through 16 . . . . . ▶																																	
<b>18</b> Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .																																	
<b>19</b> Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) . . . . .																																	
<b>20</b> Other changes in net assets or fund balances (explain in Schedule O) . . . . .																																	
<b>21</b> Net assets or fund balances at end of year. Combine lines 18 through 20 . . . . . ▶																																	

**BAA** For Paperwork Reduction Act Notice, see the separate instructions. Form 990-EZ (2012)





Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V

33 Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' provide a detailed description of each activity in Schedule O
34 Were any significant changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)
35 a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?
b If 'Yes,' to line 35a, has the organization filed a Form 990-T for the year? If 'No,' provide an explanation in Schedule O
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N
37 a Enter amount of political expenditures, direct or indirect, as described in the instructions
b Did the organization file Form 1120-POL for this year?
38 a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?
b If 'Yes,' complete Schedule L, Part II and enter the total amount involved
39 Section 501(c)(7) organizations. Enter:
a Initiation fees and capital contributions included on line 9
b Gross receipts, included on line 9, for public use of club facilities
40 a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911; section 4912; section 4955
b Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I
c Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958.
d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T
41 List the states with which a copy of this return is filed

42 a The organization's books are in care of Phyllis Dill Telephone no. (850) 245-0392
Located at 325 W Gaines St. - Room 1114 Turlington Bldg Tallahassee FL ZIP+4 32399

b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?
If 'Yes,' enter the name of the foreign country:
See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.
c At any time during the calendar year, did the organization maintain an office outside of the U.S.?
If 'Yes,' enter the name of the foreign country:

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the tax year

44 a Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ
b Did the organization operate one or more hospital facilities during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ
c Did the organization receive any payments for indoor tanning services during the year?
d If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O
45 a Did the organization have a controlled entity of the organization within the meaning of section 512(b)(13)?
b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)

	<b>Yes</b>	<b>No</b>
<b>46</b> Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I . . . . .	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Part VI Section 501(c)(3) organizations only**

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI . . . . .

	<b>Yes</b>	<b>No</b>
<b>47</b> Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II . . . . .	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>48</b> Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E . . . . .	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>49 a</b> Did the organization make any transfers to an exempt non-charitable related organization? . . . . .	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>b</b> If 'Yes,' was the related organization a section 527 organization? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>

**50** Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and title of each employee paid more than \$100,000	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
None				
-----				
-----				
-----				
-----				
-----				

**f** Total number of other employees paid over \$100,000. . . . . ▶ \_\_\_\_\_

**51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
None		
-----		
-----		
-----		
-----		
-----		

**d** Total number of other independent contractors each receiving over \$100,000. . . . . ▶ \_\_\_\_\_

**52** Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A. . . . . ▶  **Yes**  **No**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer _____ Date <span style="float: right;">11/06/13</span>
	Type or print name and title. <u>Paul Edwards</u> <span style="float: right;">Chairperson</span>

<b>Paid Preparer Use Only</b>	Print/Type preparer's name Gloria Mills	Preparer's signature _____	Date _____	Check <input type="checkbox"/> if self-employed	PTIN P00256501
	Firm's name ▶ IRESCUE TAX PLANNING AND CONSULTING	Firm's address ▶ 3708 W BAY TO BAY TAMPA FL 33629-6912		Firm's EIN ▶ 59-3376509	Phone no. (813) 837-1100

May the IRS discuss this return with the preparer shown above? See instructions. . . . . ▶  **Yes**  **No**

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

**Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.**

▶ **Attach to Form 990 or Form 990-EZ.** ▶ **See separate instructions.**

OMB No. 1545-0047

**2012**

**Open to Public Inspection**

<b>Name of the organization</b> Blind Services Foundation of Florida, Inc	<b>Employer identification number</b> 55-0888147
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**Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.**

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1  A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i).**
- 2  A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9  An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 10  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a  Type I      b  Type II      c  Type III — Functionally integrated      d  Type III — Non-functionally integrated
- e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
 

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? . . . . .		
(ii) A family member of a person described in (i) above? . . . . .		
(iii) A 35% controlled entity of a person described in (i) or (ii) above? . . . . .		

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? . . . . .		
(ii) A family member of a person described in (i) above? . . . . .		
(iii) A 35% controlled entity of a person described in (i) or (ii) above? . . . . .		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in column (i) listed in your governing document?		(v) Did you notify the organization in column (i) of your support?		(vi) Is the organization in column (i) organized in the U.S.?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
<b>Total</b>									

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants.') . . . . .						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
3 The value of services or facilities furnished by a governmental unit to the organization without charge. . . . .						
4 <b>Total.</b> Add lines 1 through 3 . . . . .						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . .						
6 <b>Public support.</b> Subtract line 5 from line 4 . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4 . . . . .						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
9 Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) . . . . .						
11 <b>Total support.</b> Add lines 7 through 10 . . . . .						
12 Gross receipts from related activities, etc (see instructions) . . . . .					12	
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) . . . . .	14	%
15 Public support percentage from 2011 Schedule A, Part II, line 14 . . . . .	15	%
16a <b>33-1/3% support test – 2012.</b> If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
b <b>33-1/3% support test – 2011.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
17a <b>10%-facts-and-circumstances test – 2012.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
b <b>10%-facts-and-circumstances test – 2011.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ▶ <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>1</b> Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants.') . . . . .	52,037.	88,686.	57,270.	54,030.	59,657.	311,680.
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .	634.	551.	0.			1,185.
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge. . . . .						
<b>6 Total.</b> Add lines 1 through 5 . . . . .	52,671.	89,237.	57,270.	54,030.	59,657.	312,865.
<b>7 a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year . . . . .						
<b>c</b> Add lines 7a and 7b . . . . .						
<b>8 Public support</b> (Subtract line 7c from line 6.) . . . . .						312,865.

**Section B. Total Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>9</b> Amounts from line 6 . . . . .	52,671.	89,237.	57,270.	54,030.	59,657.	312,865.
<b>10 a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .	29,515.	8,093.	5,355.			42,963.
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						
<b>c</b> Add lines 10a and 10b . . . . .	29,515.	8,093.	5,355.			42,963.
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) . . . . .						
<b>13 Total support.</b> (Add lns 9, 10c, 11, and 12.) . . . . .	82,186.	97,330.	62,625.	54,030.	59,657.	355,828.

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . .

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f)) . . . . .	<b>15</b>	87.93 %
<b>16</b> Public support percentage from 2011 Schedule A, Part III, line 15. . . . .	<b>16</b>	82.96 %

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	12.07 %
<b>18</b> Investment income percentage from 2011 Schedule A, Part III, line 17 . . . . .	<b>18</b>	17.04 %

**19 a 33-1/3% support tests — 2012.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization . . . . .

**b 33-1/3% support tests — 2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization . . . . .

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. . . . .





**IRS e-file Signature Authorization  
for an Exempt Organization**

For calendar year 2012, or fiscal year beginning Jul 1, 2012, and ending Jun 30, 2013.

**2012**

Department of the Treasury  
Internal Revenue Service

▶ **Do not send to the IRS. Keep for your records.**

Name of exempt organization

Employer identification number

Blind Services Foundation of Florida, Inc

55-0888147

Name and title of officer

Paul Edwards

Chairperson

**Part I Type of Return and Return Information (Whole Dollars Only)**

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than 1 line in Part I.

1 a Form 990 check here . . . ▶ <input type="checkbox"/>	b Total revenue, if any (Form 990, Part VIII, column (A), line 12) . . . . .	1 b	
2 a Form 990-EZ check here . . . ▶ <input checked="" type="checkbox"/>	b Total revenue, if any (Form 990-EZ, line 9) . . . . .	2 b	<u>60,671.</u>
3 a Form 1120-POL check here . . . ▶ <input type="checkbox"/>	b Total tax (Form 1120-POL, line 22) . . . . .	3 b	
4 a Form 990-PF check here . . . ▶ <input type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part VI, line 5) . . . . .	4 b	
5 a Form 8868 check here . . . ▶ <input type="checkbox"/>	b Balance Due (Form 8868, Part I, line 3c or Part II, line 8c) . . . . .	5 b	

**Part II Declaration and Signature Authorization of Officer**

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2012 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

**Officer's PIN: check one box only**

I authorize \_\_\_\_\_ to enter my PIN  as my signature  
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2012 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2012 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ \_\_\_\_\_ Date ▶ 11/06/2013

**Part III Certification and Authentication**

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN . . . . .   
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2012 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ \_\_\_\_\_ Date ▶ \_\_\_\_\_

**ERO Must Retain This Form – See Instructions  
Do Not Submit This Form To the IRS Unless Requested To Do So**



Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Part I, Line 16 Other Expenses**

Other expenses (describe in Schedule O)

Bank Service Charges	172.
Insurance	912.
Licenses/Permits	136.
Phone	150.
Travel	0.
Website	120.
Office Supplies	18.
Advertising	1,555.
<b>Total</b>	<u><u>3,063.</u></u>

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Part I, Line 10 Grants and Similar Amounts Paid**

Purpose of Payment . . . . . Gifts and Donations Fund

Class of Activity	Grantee's Name and Address	Grantee's Relationship	Amount Given
Class 1	Business . . . <input type="checkbox"/> Person . . . . . <input type="checkbox"/>		
			36,635.

If property other than cash was given, the following additional information needs to be provided:

Description of Property . \_\_\_\_\_  
 Date of Gift . . . . . \_\_\_\_\_

Book Value	How Book Value Determined
FMV	How FMV Determined

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Page 1, Part II, Line 24**

Line 24 - Other Assets:	Beginning of Year	End of Year
Deposit for Fundraisers		0.
<b>Total</b>		<u><u>0.</u></u>

---

**Supporting Statement of:**

---

Form 990-EZ/Line 13

<b>Description</b>	<b>Amount</b>
Consulting	12,188.
Accounting	440.
Legal	260.
Audit	7,000.
Total	<u>19,888.</u>

# THE ABLE TRUST™

[www.abletrust.org](http://www.abletrust.org)



## Empowerment



## Education



## Employment

### 2013 Annual Report

Florida Endowment Foundation for Vocational Rehabilitation

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# The Able Trust Board of Directors



**Chair**  
Richard L. Cole, Jr., Esq.  
Attorney  
The Villages



**Vice Chair**  
Bridget R. Pallango  
Goodwill Industries of South Florida  
Miami



**Treasurer**  
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Agency for Persons with Disabilities  
Tallahassee



Karen Moore  
Moore Consulting Group  
Tallahassee



Arlene Shackleford  
NextEra Energy  
Juno Beach



Ann Marie Taglienti  
JP Morgan Chase  
Ft. Lauderdale

## Ambassadors

- Eladio Amores • Division of Vocational Rehabilitation
- Bob Bromberg • Bromberg & Associates
- Lara Burnside • Body Worx, LLC
- Bob Butterworth • Fowler White Boggs
- Nancy Kline • Morgan Stanley Smith Barney
- Pamme Taylor • WellCare Health Plans, Inc.

## Message from the Chairman of the Board & President

*We are pleased to present the 2013 Annual Report of the Able Trust, which includes highlights of the Foundation's work throughout Florida over the past year. The following pages contain a timeline of the Able Trust's growth, a few of the many employment success stories of people with disabilities (PWD), and a listing of the individuals and businesses that support our mission. As we look back on 2013 and forward to 2014, we are empowered by the improving economy in Florida and increased public awareness of the benefits of employing PWD, but understand much work still needs to be done if our mission to be a key leader in providing Floridians with disabilities opportunities for successful employment is to succeed.*

*In order to continue to advance that mission, the Board and staff of the Able Trust have taken a very serious look at the factors that prevent PWD from obtaining successful employment. What we learned first was that the issue was complicated – businesses had a difficult time getting PWD to apply for jobs that matched their skills; PWD were not learning the skills required of the current Florida economy – for a number of reasons; major misperceptions exist that limit belief in the capability of PWD in the workforce; the primary educational and occupational activities that often lead to employment were significantly lacking in the employment journey for PWD; and businesses often have immediate needs for staff that cannot be satisfied by some organizations that work with long term training of PWD. There is also a significant transportation barrier, not only in initial employment for PWD, but which can also effectively limit their opportunities to accept advancement in their profession.*

*We found it significant that in our analysis, we did not find a single instance where making reasonable accommodations was an obstacle to the hiring of a talented candidate for a position. The plain fact is that businesses want to hire the best person available for the job and they make accommodations every day for the right workers, whether they have a disability or not.*

*The Board and staff of The Able Trust began work on a plan to address the misperceptions about the skills available in the workforce made up of people with disabilities, and launched a three-year communications campaign to change attitudes and hiring practices in September, 2013. The Communications Plan will include a three-month communications campaign for each of the next three years, and we are already beginning to see an increased awareness of the unique and talented workforce that we represent.*

*Since its beginnings, The Able Trust has helped to put many thousands of people with disabilities to work. We do that work through many local organizations throughout the state that are either grantees or collaborate with us on a volunteer basis. We also do that through a great group of people on our staff and others who serve us as consultants. And we accomplish that task through the many fine businesses in Florida that are willing and eager to include people with disabilities on staff as they create a truly diverse and inclusive workforce.*

*We carry on the mission of The Able Trust with passion and the knowledge that we will not complete the work, but we cannot abandon it. Enjoy the report, and as always, we invite you to contact us if you wish additional information or to offer your support.*

*Kindest regards,*



Dr. Susanne F. Homant, MBA  
President & CEO



Richard A. Cole Jr., Esq.  
Chairman of the Board



## Success Stories

### Employment of Epicurean Proportions

*Culinary Institute at Achievement & Rehabilitation Center, Inc. - Sunrise*

The Culinary Institute at Achievement & Rehabilitation Center, Inc. in Sunrise received \$40,000 of grant funding from The Able Trust. The funds have supported individuals with disabilities participating in post-secondary education designed to provide intense instruction in the culinary arts. Participants will graduate with experience in meal production and catering, and go on to gain employment at restaurants, resorts, catering companies, and cruise lines. For individuals like Tiana, the program has been the path to employment. She and her classmates graduated after successfully completing a final project which consisted of producing a three-course meal for their Student Chef Luncheon that included potato soup, grilled shrimp, cornbread, and berry cobbler with ice cream and mint. Tiana's kitchen skills and technical know-how earned her a position at an area grocery kitchen, where she is in charge of preparing foods for customers with special dietary needs, and maintaining temperatures on the line equipment. Thanks to grant-funding for this program, Tiana has an entry-level position with a company she loves, and eyes management positions in the future.



### Hope Restored

*Hope Clubhouse of Southwest Florida, Inc. - Ft. Myers*

The Able Trust has assisted in the funding of an employment program at Hope Clubhouse of Southwest Florida, Inc. in Fort Myers with a grant of \$45,000. The funds have supported individuals with disabilities in Lee and Charlotte counties, helping them attain transitional employment as they gain life skills and confidence in living with a mental illness. Members of the clubhouse gain from both the giving and receiving of peer support to accomplish independent living and employment in the community. For individuals like Timothy, the program has been the key to his successful employment at the local Public Defender's office. Funds from The Able Trust have been critical to the organization, expanding the duties of both the Employment Specialist and Program Support Staff to meet the overwhelming employment needs of the growing list of members.

### Lighting the Pathway to Employment

*Lighthouse Works - Orlando*

This year, The Able Trust awarded Lighthouse Works of Orlando a \$48,000 grant which was used to fund an employment program at their call center. This has provided unique employment opportunities for individuals like Emma, who began as a client of the program and was eventually hired by the Lighthouse to run their business development and marketing activities. Emma had professional skills in accounting, but as her eyesight diminished, it was apparent that she would need to change careers. She is thrilled with her new position, which utilizes her business acumen as she develops relationships with area businesses, resulting in opportunities to help others obtain their employment goals.



"I can't express strongly enough how important it is for people living with vision loss to know that a fulfilling career is a realistic opportunity. I, for one, am so grateful for the chance to be included, to contribute; to count."



## Ready for the World

*The Pepin Academies, Inc. – Tampa*

The Pepin Academies, Inc. of Tampa received \$50,000 from The Able Trust to assist in the funding for their expanded vocational training and employment program. The funds have supported the development of a second downtown campus, centrally located at the Tampa Police Department. Students receive vocational instruction in the onsite classroom, as well as work experience in the various administrative departments of the Tampa Police Department. For individuals like Anthony, the program has been his path to engaging his love of technology while pursuing a career. Funds from The Able Trust have been instrumental in helping Pepin Academies develop the collaborative project, ensuring that participants are ready for the world of work with resume-building, real-life experience.

## A Little Help from Our Friends

*Stand Among Friends – Boca Raton*

Stand Among Friends in Boca Raton received a \$60,000 grant from The Able Trust to fund a professional career placement program. This program has provided crucial support for recent and soon-to-be graduates of Florida Atlantic University as they begin their careers. For individuals like Carrie, who needed assistance in getting an internship in the mental health counseling field, the assistance provided by the grant-funded organization has been invaluable. Carrie has stellar academic credentials, but found potential employers hesitant to accept an intern who used a wheelchair for mobility. Staff from Stand Among Friends assisted Carrie by aggressively searching for an agency that would provide her the opportunity to provide counseling to individuals with mental health issues and in the criminal justice system. Carrie is very excited about embarking on her new career path, which includes an internship thanks to the support of the grant-funded staff.



## “Do the Right Thing When Nobody is Looking”

*WestCare Gulf Coast – Florida, Inc. – St. Petersburg*



The Able Trust has assisted in funding an employment program at WestCare Gulf Coast – Florida, Inc. in St. Petersburg with a grant of \$50,000. The funds have supported individuals with disabilities from a four-county area, helping them gain employment as a key in their recovery from drug/alcohol addiction and mental health disorders. Participants in the court-ordered program generally started using illegal substances at a young age as a coping mechanism to their family circumstances, or to mask a variety of disabilities. For individuals like Alex, the program has been the path to recovery, self-awareness, and successful employment.

“I learned a lot about the proper procedures for gaining employment, like how to conduct myself in an interview successfully,” Alex said. “The staff went above and beyond to help me out, motivating me and encouraging me to keep pounding the pavement.”

Alex’s hard work paid off with a job at Burger King as a cook and server, and his continued attention to detail has made him the go-to employee when others fall short in their duties. Alex’s supervisor has encouraged him to look at the supervisory positions available, and Alex is hopeful for his future. His new motto is “do the right thing when nobody is looking”.

## 2013 Grant Awards

### North Florida Grant Awards

Grant Type	Areas Served	Grant Amount
<b>Ability 1<sup>st</sup></b>		
High School High Tech	Gadsden	\$21,000.00
High School High Tech	Leon	\$21,000.00
High School High Tech	Wakulla	\$21,000.00
<b>Center for Independent Living of North Central Florida</b>		
High School High Tech	Alachua	\$21,000.00
High School High Tech	Rural Alachua	\$21,000.00
High School High Tech	Bradford	\$21,000.00
High School High Tech	Levy	\$21,000.00
High School High Tech	Marion	\$21,000.00
High School High Tech	Putnam	\$21,000.00
<b>Dyslexia Research Institute</b>		
High School High Tech	Gulf	\$21,000.00
<b>Florida Crown Workforce Board, Inc.</b>		
High School High Tech	Columbia	\$21,000.00
High School High Tech	Dixie	\$21,000.00
High School High Tech	Gilchrist	\$21,000.00
High School High Tech	Union	\$21,000.00
<b>Goodwill Easter Seals of the Gulf Coast</b>		
High School High Tech	Escambia	\$21,000.00
<b>Independent Living Resource Center, Inc.</b>		
High School High Tech	Baker	\$21,000.00
High School High Tech	Clay	\$21,000.00
High School High Tech	Duval	\$21,000.00
High School High Tech	Nassau	\$21,000.00
High School High Tech	St. Johns	\$21,000.00
<b>Madison County School Board</b>		
High School High Tech	Madison	\$21,000.00

### Central Florida Grant Awards

Grant Type	Areas Served	Grant Amount
<b>Beacon College</b>		
High School High Tech	Lake	\$21,000.00
<b>Brevard Schools Foundation</b>		
High School High Tech	Brevard	\$21,000.00
High School High Tech Palm Bay	Brevard	\$21,000.00



## Central Florida Grant Awards (continued)

Grant Type	Areas Served	Grant Amount
<b>Center for Independent Living in Central Florida, Inc.</b> High School High Tech	Polk	\$30,000.00
<b>Community Based Care of Central Florida</b> High School High Tech	Orange, Osceola, Seminole	\$21,000.00
<b>Foundation for Orange County Public Schools</b> High School High Tech	Orange	\$21,000.00
<b>Lighthouse Works, Inc.</b> Creating Employment Opportunities	Orange, Osceola, Seminole	\$48,000.00
<b>Quest, Inc.</b> Project SEARCH at Shingle Creek	Orange	\$50,000.00
<b>School District of Hillsborough County Technical and Career Education</b> High School High Tech	Hillsborough	\$21,000.00
<b>Service Source/Abilities, Inc.</b> High School High Tech	Pinellas	\$21,000.00
<b>St. Petersburg College Foundation</b> Student Employment Project	Pinellas	\$60,000.00
<b>Van Gogh's Palette, Inc.</b> Founder's Tribute	Pinellas	\$250.00
<b>WestCare Gulf Coast, Florida, Inc.</b> Career & Learning Center	Pinellas	\$50,000.00

## South Florida Grant Awards

Grant Type	Areas Served	Grant Amount
<b>Achievement &amp; Rehabilitation Centers, Inc. ARC Broward, Inc.</b> Culinary Institute	Broward	\$45,000.00
<b>Autism Project of Palm Beach County</b> Adult Employment Services	Palm Beach	\$50,000.00
<b>Center for Independent Living of Broward</b> High School High Tech	Broward	\$21,000.00

## South Florida Grant Awards (continued)

Grant Type	Areas Served	Grant Amount
<b>Center for Independent Living of South Florida</b> High School High Tech	Miami-Dade	\$21,000.00
<b>Expansion of High School High Tech</b>	Miami-Dade	\$30,000.00
<b>Community Haven for Children and Adults with Disabilities, Inc.</b> High School High Tech	Manatee	\$21,000.00
High School High Tech	Sarasota	\$21,000.00
<b>Florida Outreach Center for the Blind, Inc.</b> Increasing Employment of the Blind through Training	Palm Beach	\$20,262.00
<b>Goodwill Industries of Southwest Florida, Inc.</b> High School High Tech	Charlotte	\$21,000.00
High School High Tech	Lee	\$21,000.00
High School High Tech	Glades, Hendry	\$21,000.00
High School High Tech	Collier	\$30,000.00
<b>Gulfstream Goodwill Industries, Inc.</b> High School High Tech	Palm Beach	\$21,000.00
<b>Hope Clubhouse of Southwest Florida, Inc.</b>	Charlotte, Collier, Glades, Hendry, Lee	\$45,000.00
<b>Lighthouse of Southwest Florida</b> Services for Individuals with Macular Degeneration	Lee	\$4,000.00
<b>Miami Lighthouse for the Blind</b> Music Under the Stars for Heiken Children	Miami-Dade	\$100.00
<b>Stand Among Friends</b> Career Ability	Broward, Dade, Palm Beach	\$60,000.00

## Other Grant Awards

Grant Type	Areas Served	Grant Amount
<b>American Cancer Society</b> Program Support	Ft. Walton Beach	\$2,500.00
<b>American Diabetes Association</b> Program Support	National	\$5,000.00
<b>American Red Cross</b> Program Support	Ft. Walton Beach	\$2,500.00
<b>Bascom Palmer Eye Institute</b> Research on Macular Degeneration	Miami-Dade	\$4,000.00

## Other Grant Awards (continued)

Grant Type	Areas Served	Grant Amount
<b>Big Bend Hospice, Inc.</b> Program Support	Leon	\$2,500.00
<b>Big Brothers/Sisters of the Big Bend</b> Program Support	Leon	\$2,500.00
<b>Brain Injury Association of Florida</b> Program Support	Broward	\$5,000.00
<b>Children's Advocacy Center</b> Program Support	Okaloosa	\$5,000.00
<b>Council on Foundations</b> Support	Nationwide	\$2,690.00
<b>Elder Care Services</b> Program Support	Leon	\$2,500.00
<b>Emerald Coast Children's Advocacy Center</b> Program Support	Okaloosa, Walton	\$1,421.13
<b>Florida Chamber Foundation</b> Support	Statewide	\$5,000.00
<b>Florida Keys SPCA</b> Support	Monroe	\$2,500.00
<b>Florida Public Broadcasting</b> Communications Campaign	Statewide	\$4,350.00
<b>Friends of Arrow Rock</b> Preservation of Arrow Rock	Kansas	\$473.71
<b>Habitat for Humanity</b> Program Support	Ft. Walton Beach	\$2,500.00
<b>Marines Toys for Tots Foundation</b> Program Support	Virginia	\$2,500.00
<b>Muscular Dystrophy Association</b> Program Support	Leon	\$5,000.00
<b>One Blood</b> Program Support	Leon	\$2,500.00
<b>Ronald McDonald House Charities</b> Program Support	Leon	\$2,500.00
<b>United Cerebral Palsy</b> Program Support	Ft. Walton Beach	\$5,000.00
<b>WFSU</b> Capital Report & Underwriting Support	Statewide	\$22,960.00



## FLORIDA High School HighTech

For 15 years, the Florida High School High Tech Program (HSHT) has improved postsecondary outcomes for youth with disabilities. The program achieves this goal by setting high expectations; encouraging youth to consider technology related careers; and promoting the involvement of family members and other caring adults.



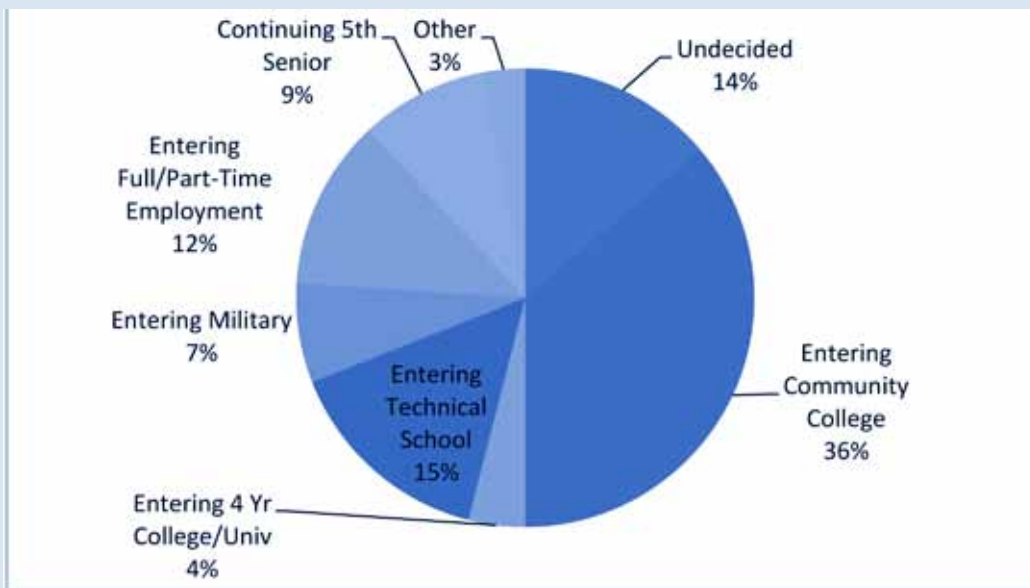
Core features of the program – job shadowing, industry site visits, mentoring, and internships – are critical components that help students form postsecondary education and employment goals and transition from school into the world of work.

The HSHT program is based on the five nationally recognized Guideposts for Success: School-Based Preparatory Experiences, Career Preparation & Work-Based Learning, Connecting Activities, Youth Leadership & Development, and Family Involvement & Supports. Research has shown that each guidepost is essential to what youth with disabilities need to succeed in adulthood.

The Florida HSHT Program operates in 39 sites throughout the state including a juvenile justice setting and a pilot foster care site.

Below are the postsecondary and employment outcomes for the 370 high school graduates served during FY 2013 by the Florida HSHT Program.

**Postsecondary and Employment Outcomes FY 2013  
(serving 370 high school graduates)**



## EMPOWERMENT



HSHT helps youth to learn and practice independent and informed decision-making for academic and career preparation. This is facilitated through program workshops, leadership development, and real-world work experiences including job-shadowing and summer internships. During the summer of 2013, 256 students participated in summer internships, 85% of which were paid through a stipend by the employer, the HSHT program site, the local Workforce Development Board, or another community grant provider.

## EDUCATION



During the 2012-2013 school year, the Florida HSHT Program served 1,101 students with disabilities in 36 Florida counties. Services were provided in 97 high schools and alternative education settings including Department of Juvenile Justice facilities and a foster care pilot site. The Florida HSHT Program experienced a less than 1% high school drop-out rate for all seniors participating in the program.

## EMPLOYMENT



74% percent of Florida HSHT graduates entered postsecondary education, continuing education, or employment upon graduation. In addition, 125 Florida HSHT students, representing all grades, secured employment through program services.

*“My success is a product of what HSHT does for youth with disabilities.”*

*Rocky, HSHT Graduate and Nova Southeastern University Pre-Law Student*



Florida Disability Employment Awareness Month/Disability Mentoring Day (DEAM/DMD) is an annual event that utilizes a network of dedicated community liaisons throughout the state that recruit people with disabilities to participate, while engaging businesses and other organizations to open their doors for a day of job shadowing.

DEAM/DMD activities can take the form of several different events ranging from one-on-one job shadowing, site tours, employer fairs, career workshops, or any combination of the four. A unique characteristic of DEAM/DMD is there is no right or wrong way to participate. It is up to the local liaisons and the businesses themselves to determine the type, and when the event will be held. This flexibility allows for true ownership by the participating businesses and easily administered events for all involved.

This year, 80 community liaisons participated in DEAM/DMD, along with more than 250 business and organizations in 61 counties. This immense network of opportunity allowed more than 2,600 DEAM/DMD participants to have a career experience at some point during September, October, November and December of 2013. There are several liaisons that recognize that DEAM/DMD can occur throughout the entire year, and they work in their areas to continue to provide those experiences during the other parts of the year.

DEAM/DMD would not be the success it is without the tireless efforts of the network of community liaisons as well as the 2013 Florida Disability Employment Coalition comprised of:

**Dan Marino Foundation**

**Darden Restaurants**

**Florida Chamber of Commerce Foundation**

**Florida Department of Veterans' Affairs**

**Florida Division of Vocational Rehabilitation**

**Florida Power and Light**

**Publix Super Markets**

**TD Bank**

**WellCare**





## Florida Youth Leadership Forum

EMPOWERMENT | EDUCATION | EMPLOYMENT



**EMPOWERMENT**



**EDUCATION**



**EMPLOYMENT**

As children, many of us grew up coveting the “super powers” that our comic book, movie, and TV heroes possessed. The ability to fly, run at the speed of light, or see the future consumed our fantasies and was the stuff of daydreams.

But then we grow up, and realize that such things are wishful thinking; the result of an over-active imagination.

Or are they?

While we may not have super-human strength or paranormal abilities, within each of us lies the power to shape the future; to impact the life of a person who will go on to bring about change in a time when we may no longer be alive to see it.

At the 2013 Florida Youth Leadership Forum (YLF), high school students with disabilities from across the state came to Tallahassee for four days of leadership and social training during the 14th annual YLF, hosted continuously by The Able Trust. In the process, gifts, talents, and strengths were unveiled as each participant discovered the power of faith... faith in themselves and their ability to impact the world they live in without fear of limits and boundaries.

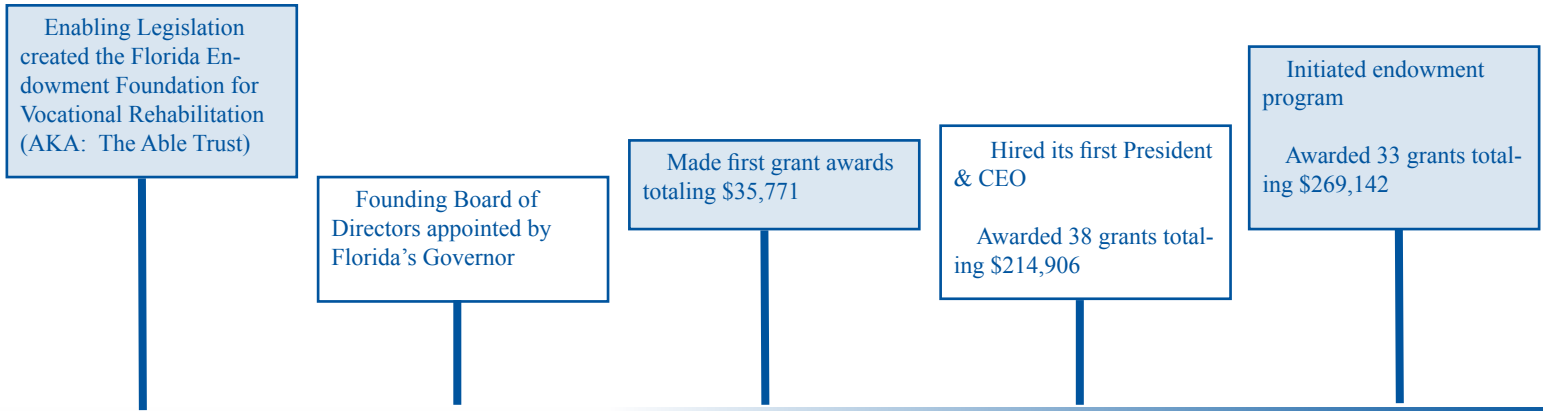
“I thank all of you for helping me find the self-confidence I didn’t have before,” delegate Brianna Schubert said. “The other day, I raised my hand in class and asked for help, whereas before I would’ve just sat there and struggled. I’m no longer afraid to walk to all my classes alone with my walker. YLF crosses my mind so often, mostly when I notice how much it truly has helped me. The power of YLF!”

*“I had such a great time at the Youth Leadership Forum at our state capital these past few days. I have had a lot of fun experiences and made a bunch of new friends. The Forum has taught me how to embrace my disability and inspire others to do the same. If we all come together, we can make a BIG difference, and I hope to take what I learned from this experience and SHOW THE WORLD THAT WE CAN!”*  
Drew - 2013 Delegate

### PROGRAM HIGHLIGHTS

- DAY AT THE CAPITOL
- COMMUNITY SERVICE PROJECT
- DAY AT THE PARK
- CAREER FAIR & NETWORKING LUNCHEON
- TRUE COLORS PERSONALITY SEMINAR

## Our Timeline



# See How We

**1990**

**1991**

**1992**

**1993**

**1994**

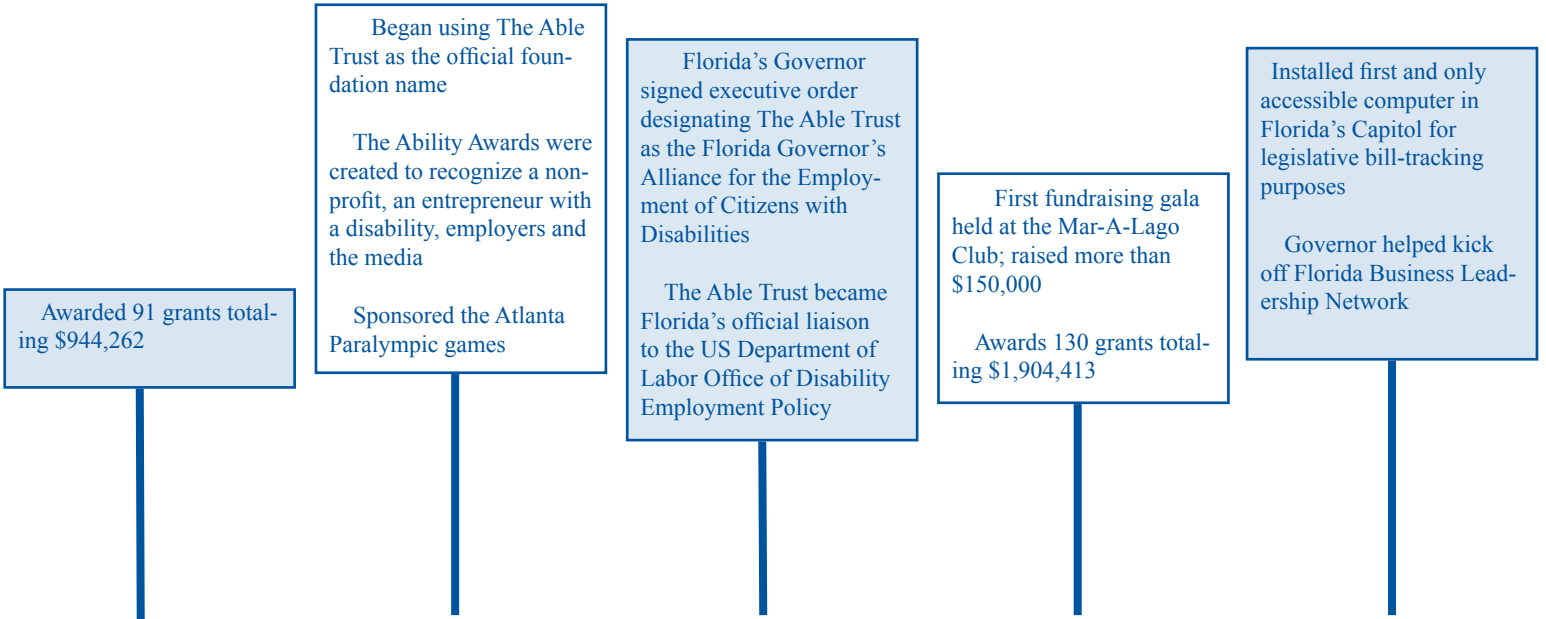
Funded projects related to technology for the blind, employment training and transportation

Grants became available to rural areas of the state

Funded emergency deaf services for Hurricane Andrew Relief

Partnered with the Dole Foundation to fund initial High School High Tech (HSHT) project in Florida





# e've Grown!

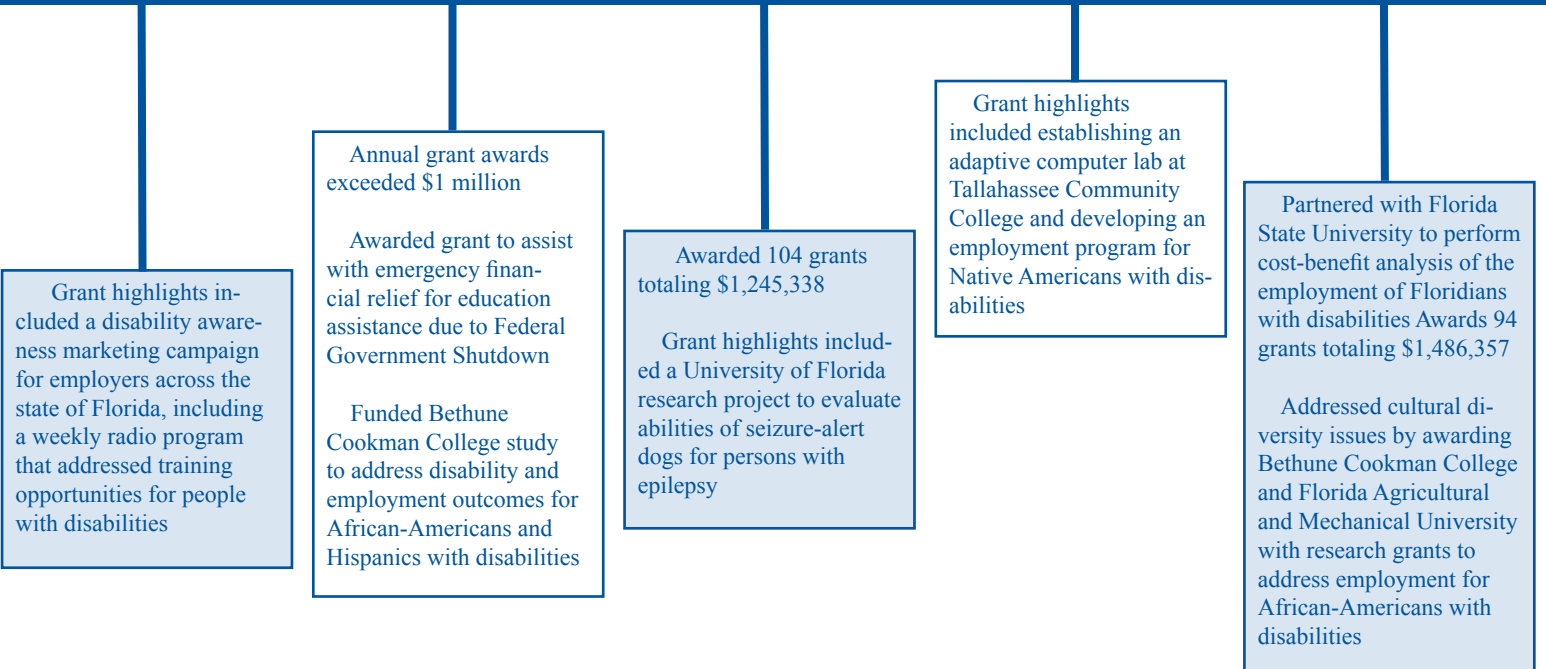
1995

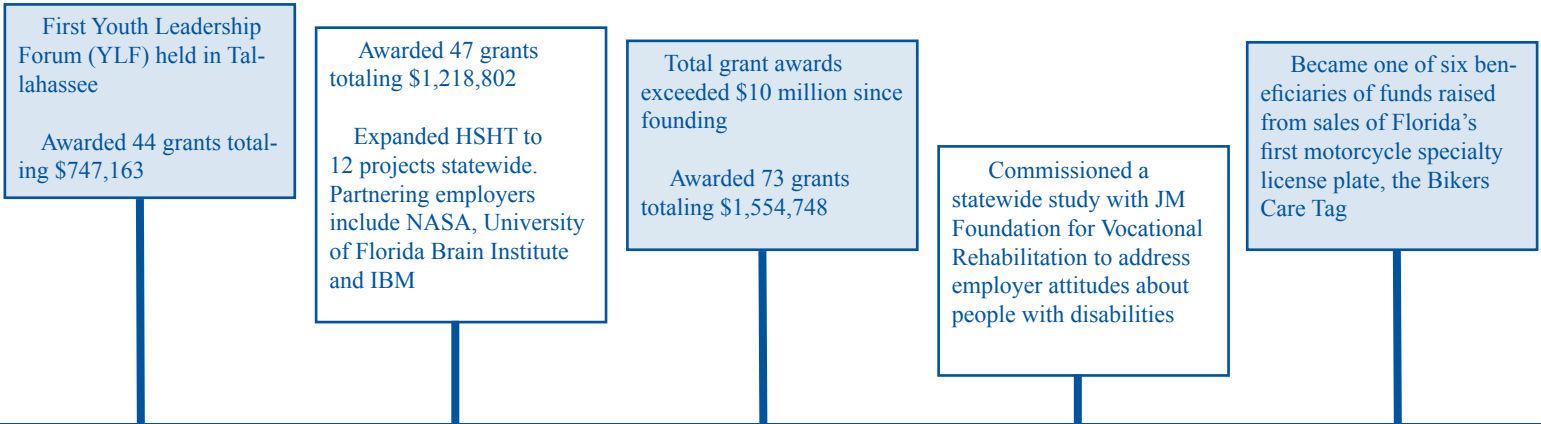
1996

1997

1998

1999





2000

2001

2002

2003

2004

First-time funding awarded to a Chamber of Commerce to develop a job-training program for students with disabilities

Funded statewide workshop series to address new "Ticket to Work" legislation regarding social security benefits for persons with disabilities

Sponsored first annual Florida Disability Mentoring Day (DMD)

Received \$990,000 grant award over five years from the Office of Disability Employment Policy to expand the Florida HSHT program

Recruited more than 700 students with disabilities to participate in Florida DMD with the support of local disability agencies

Commissioned a statewide study to assess myths and misconceptions of employers in regard to hiring people with disabilities

Awarded more than \$1.7 million in grants to 53 non-profit agencies

Awarded over \$1.6 million in grants to 58 non-profit agencies

Collaborated with the Division of Vocational Rehabilitation to expand the HSHT program by adding 10 new sites to serve an additional 200 students

Grant awards exceed \$2 million

HSHT served more than 900 students with transitioning and career development. 90 percent of graduates entered post-secondary education or employment

Project Impact, a pilot program providing leadership development through volunteerism for HSHT students, initiated with Volunteer Florida

Grant awards exceed \$1 million

HSHT expanded to 37 project sites across the state, with over 1,000 students with disabilities receiving career development and transition support to prepare for life beyond high school

Acquired the “Look at My Ability” campaign rights from the Miami-Dade BLN, to reinforce the benefits of hiring Floridians with disabilities

The Able Trust exceeded \$23 million in grants to community organizations throughout Florida’s 67 counties since its founding

The first annual art contest was held, inviting artists with a disability to design The Able Trust Holiday Card

The Able Trust launched the “Look at My Abilities” campaign during the fall, a statewide educational initiative reinforcing the benefits of hiring Floridians with disabilities

YLF celebrated its 10th anniversary, welcoming more than 70 young Floridians with disabilities to learn about career options and advocacy

HSHT served 1,469 students with disabilities through 107 schools in 35 Florida counties. 239 students secured employment and 73% entered post-secondary education

## 2005

Served as the national kickoff host for DMD in collaboration with the Division of Vocational Rehabilitation and other statewide partners. DMD enabled over 800 students and job seekers with disabilities to experience one-on-one job shadowing with business mentors across the state

## 2006

Launched a national pilot project with CVS Pharmacy and the US Department of Labor Office of Disability Employment Policy to provide internships to students with disabilities

Partnered with the APD, Vocational Rehabilitation and Workforce Florida to expand 11 local chapters of the Florida BLN, leading the nation in the largest chapter development for a single state

## 2007

Selected as the national launch site for DMD by the American Association of People with Disabilities

Lt. Governor participated in statewide career fair hosted by The Able Trust to kickoff DMD activities, with nearly 500 students with disabilities in attendance

Received the US Business Leadership Network “Exceptional Partner of the Year Award”

## 2008

HSHT served 1,408 students with disabilities through 112 schools in 36 Florida counties. 86 percent of HSHT graduates entered post secondary education or employment

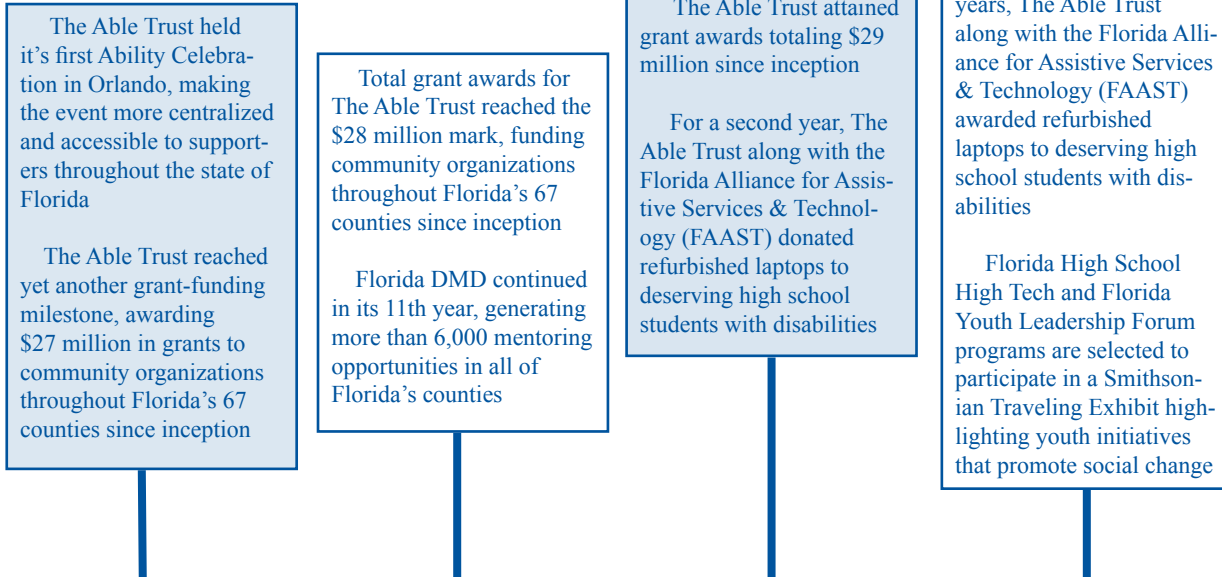
On DMD in October, led the country in connecting more than 3,000 mentees with disabilities and workplace mentors for job shadowing activities

The Able Trust offices were moved to a more accessible location in Tallahassee

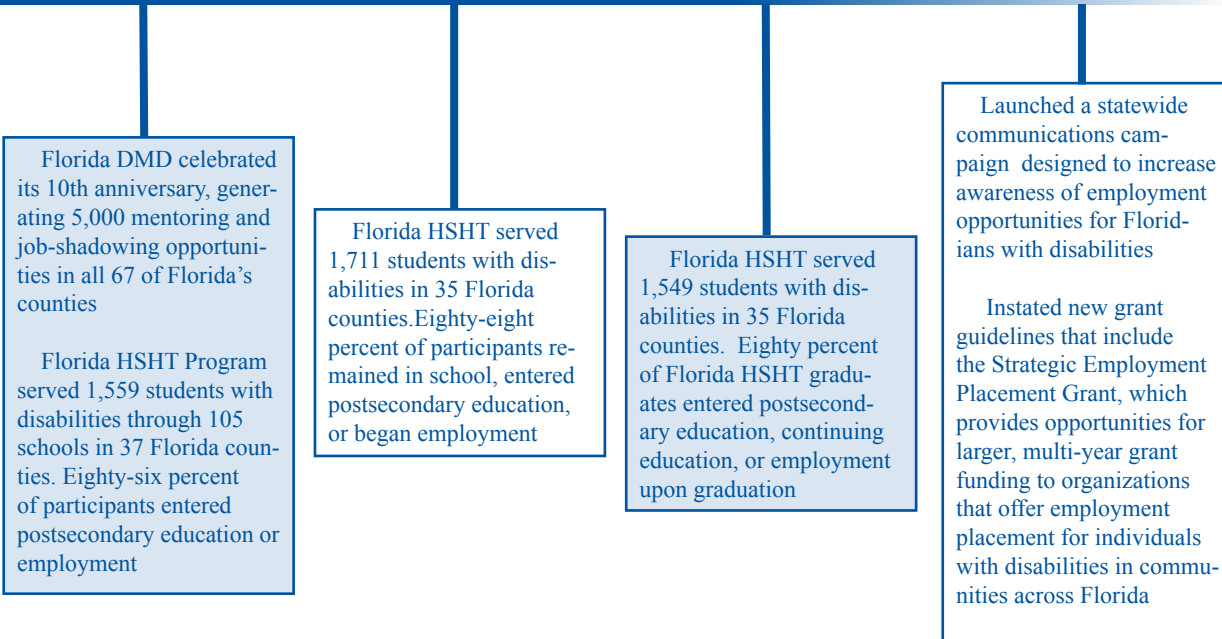
## 2009

For the third year in a row, The Able Trust Grants Program provided community-based organizations in 52 counties more than \$2 million dollars in grant funding to support employment opportunities for individuals with disabilities

The Able Trust and its partners began National Disability Employment Awareness Month activities in Tallahassee on October 1



**2010      2011      2012      2013**



## The 2013 Ability Awards



*Able Trust President & CEO Dr. Susanne Homant (left) and Board Chairman Richard Cole (right) present Senator Stephen Wise with the inaugural Founder's Award named in his honor.*

On June 14, 2013 at the annual Ability Awards luncheon, The Able Trust recognized 13 businesses and individuals who, through their service and dedication, provided Floridians with disabilities opportunities for successful employment. This year's ceremony, however, took on special meaning as Senator Stephen R. Wise was formally recognized for his role in creating The Florida Endowment Foundation for Vocational Rehabilitation -- now known as The Able Trust -- back in 1990.

"On the behalf of all those you have inspired and empowered, The Able Trust is pleased to create the Stephen R. Wise Founder's Award to recognize and honor Senator Wise for his contributions to a better, productive life for all Floridians with disabilities," Able Trust President & CEO Dr. Susanne Homant said.

### Congratulations to our 2013 Ability Awardees!

- Debra Webb, Hope Clubhouse - Beverly Chapman Award for Outstanding Employment Placement Program
- E. Gay Hawk, National Alliance on Mental Health Pinellas County - Dr. George Spelios Leadership Award
- Staci Spanos, Anchor WJXT Channel 4 - Media Representative Award
- Thom DeLilla - Adult Leadership Award
- Renzo Burga - Young Adult Leadership Award
- Publix Super Markets - Large Employer of the Year
- Crumb de la Crumb, Cindy Shoemake - Small Employer of the Year
- Representative Janet H. Adkins - Representative of the Year Award
- Senator Aaron Bean - Senator of the Year Award
- Dyslexia Research Institute, Inc. - High School High Tech Program of the Year
- Aleisa McKinlay, Director Florida Division of Vocational Rehabilitation - Public Employee of the Year
- Community Based Care of Central Florida - Public Organization of the Year
- Lisa Hancock, Manpower - Volunteer of the Year



*Able Trust President & CEO Dr. Susanne Homant (left) presents Cindy Shoemake (right) with the Small Employer of the Year Award at her business located in Valrico.*

## Giving the Gift of Technology to Florida Teens



The Able Trust and The Florida Alliance for Assistive Services and Technology (FAAST) continue to enrich the lives of high school students with disabilities across the state of Florida. Several refurbished laptops loaded with the latest software have been distributed to deserving teens. Each student submitted an application describing their disability, and how a lack of technology affected their lives.

## Our Donors

The Able Trust has provided and expanded critical employment programs for Floridians with disabilities by offering more than \$31 million in direct grant support since 1990. There are many opportunities to support the mission of The Able Trust, such as making a donation, creating an endowment, or sponsoring projects/participants. The Able Trust recognizes its donors in various ways and respects the wishes of those who want to remain anonymous. Many thanks to the following for their support!

---

### FY 2012 - 2013 (July 1, 2012 - December 31, 2013)

Jeannie Amendola	Darden Restaurants, Inc.
Eladio Amores	Ted and Barbara Densmore
American Express Charitable Fund	Janet Edwards
Greg Barker and Dorene Barker	Edyth Bush Charitable Foundation, Inc.
Beacon College	Farmers & Merchants Bank
Howard Bell	Florida Developmental Disabilities Council, Inc.
Marcy Benton	Florida Division of Vocational Rehabilitation
Bob Billingslea	Florida Blue Foundation
Suzann and Richard Boisvert	Florida Chamber Foundation
Bob and Penny Bromberg	Florida Hospital Community Relations
Gary Bryant	Allen and Sandra Fowler
Lorenzo and Maria Burga	Leon Golden Revocable Trust
Lara Burnside	Lisa Hall
Capital City Bank Group Foundation	Hancock Bank
Capital City Consulting, LLC	Michael and Kathleen Hanson
Joseph Choma	JR and Erika Harding
Richard and Linda Choma	Patricia Hardman
Richard and Barbara Cole	Jason Havens
Peg Connell	Doug and Jeanne Hill
Perry and Marilyn Crowell	Joseph and Susanne Homant
CVS Caremark	Humenansky Family Foundation
Matt and Danielle Dahm	IARP-Florida SE Chapter
Daniel R. Pando Revocable Trust	Larry and Nancy Kline
Dan Marino Foundation	Paul Kacprzak

Candace Knapp	S&B Engineers and Constructors, Ltd.
Anthony LaCava	Mercedes Sabina
Lise Leano	Arlene Shackelford
Barbara and Richard MacArthur	Shutts & Bowen, LLP
Susan C. Macet	Barbara Somonte
Maria Lyle Photography	Woody and Donna Simmons
Mark Demont Insurance Agency	Southwest Florida Job Squad
Wayne McDaniel	Larry and Faith Spalding
Kathryn and James McManus	Joyce Spelios
Dennis and Gwendolyn McNenney	Elliott and Dianne Steele
Merrill Lynch	Anne Marie Taglienti
Michael Cusick & Associates, Inc.	TD Charitable Foundation
Karen Moore	Thomas M. and Irene B. Kirbo Charitable Trust
Ysaac Nanin	Jaime and Guadalupe Torres
Naples Beach Hotel & Golf Club	Gary Trippe
Lee Nasehi	Universal Studios Orlando
Madeline Nunes	Verizon Foundation
Wendy O'Connor	Van Gogh's Palette, Inc., dba Vincent House
David Odahowski	Dan and Ria Voss
William and Katie Ourand	Walmart Foundation
Bridget Pallango	Walt Disney World Resort
Panhandle Area Educational Consortium	WellCare Health Plans, Inc.
Peabody Orlando	Wells Fargo Bank Foundation
John R. Pettengill	Richard and Diane Wendt
Aleida Pridgen	I. Welch and Virginia Whitesell
Publix Super Market Charities	Walter Zielinski
Raymond James and Associates	Ronald & Janice Ziembko
Regions Bank	
Rosen Shingle Creek	
Rotary Club of Tallahassee	

## Financials

Thomas Howell  
Ferguson P.A.

Certified Public Accountants  
& Business Advisors

### Report of Independent Auditors

The Members of  
The Florida Endowment Foundation for Vocational Rehabilitation, Inc.  
d/b/a The Able Trust

#### Report on the Financial Statements

We have audited the accompanying financial statements of The Florida Endowment Foundation for Vocational Rehabilitation, Inc. d/b/a The Able Trust (the Foundation), a component unit of the state of Florida, which comprise the statement of net position as of June 30, 2013, and the related statements of revenues, expenses, and changes in net position, and cash flows for the year then ended and the related notes to the financial statements.

#### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

#### Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Florida Endowment Foundation for Vocational Rehabilitation, Inc. d/b/a The Able Trust, as of June 30, 2013, and the changes in its net position and cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.



**Other Matters**

The financial statements of the Foundation, as of and for the year ended June 30, 2012, were audited by other auditors whose report dated October 12, 2012, expressed an unmodified opinion on those statements.

*Required Supplementary Information*

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis on pages 4 through 8 be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

*Other Financial Information*

Our audit was conducted for the purpose of forming an opinion on the financial statements that collectively comprise the Foundation's basic financial statements. The budgetary comparison schedules are presented for purposes of additional analysis and are not a required part of the basic financial statements.

**Other Reporting Required by Government Auditing Standards**

In accordance with *Government Auditing Standards*, we have also issued our report dated December 5, 2013 on our consideration of the Foundation's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Foundation's internal control over financial reporting and compliance.

*Thomas Howell Ferguson P.C.*

The Florida Endowment Foundation  
for Vocational Rehabilitation, Inc.  
d/b/a The Able Trust

Statements of Net Position

	June 30,	
	2013	2012
<b>Assets</b>		
Current assets:		
Cash and cash equivalents	\$ 2,080,707	\$ 2,518,623
Investments	18,807,828	17,347,888
Due from the Division of Vocational Rehabilitation	78,790	78,790
Due from the Department of Transportation	2,628	25,888
Accounts receivable	330	49
Annuity receivable	31,083	35,081
Prepaid expenses	24,702	11,466
Other current assets	-	27,300
Total current assets	<u>21,026,068</u>	<u>20,045,085</u>
Restricted assets:		
Restricted cash and certificates of deposit for fiscal agent liabilities	3,708,927	3,506,064
Restricted investments	<u>2,702,892</u>	<u>2,436,860</u>
Total restricted assets	<u>6,411,819</u>	<u>5,942,924</u>
Contributions receivable from split-interest agreements, net		
	845,731	874,588
Annuity receivable	113,722	167,248
Furniture and equipment, net	172,952	169,761
Deposits and other assets	<u>111,974</u>	<u>108,911</u>
Total assets	<u>\$ 28,682,266</u>	<u>\$ 27,308,517</u>
<b>Liabilities and net position</b>		
Current liabilities:		
Accounts payable	\$ 33,732	\$ 41,773
Fiscal agent liabilities	3,708,927	3,506,064
Accrued expenses	<u>54,622</u>	<u>31,850</u>
Total current liabilities	<u>3,797,281</u>	<u>3,579,687</u>
Net position:		
Net investment in capital assets	172,952	169,761
Nonexpendable contributions	3,693,423	3,513,772
Unrestricted	<u>21,018,610</u>	<u>20,045,297</u>
Total net position	<u>24,884,985</u>	<u>23,728,830</u>
Total liabilities and net position	<u>\$ 28,682,266</u>	<u>\$ 27,308,517</u>

The Florida Endowment Foundation  
for Vocational Rehabilitation, Inc.  
d/b/a The Able Trust

Statements of Revenues, Expenses, and Changes in Net Position

	Years ended June 30,	
	2013	2012
<b>Operating revenues:</b>		
Public support:		
Grants	\$ 315,160	\$ 343,370
Program events	91,950	90,720
Fundraising events	36,390	45,330
DOT for sales of temporary handicap parking permits	206,720	180,940
DOR for civil penalties	1,385,681	3,056,387
Other revenue	74,204	52,190
Total operating revenues	<u>2,110,105</u>	<u>3,768,937</u>
<b>Operating expenses:</b>		
Program services:		
Public awareness and education	596,772	592,363
Grants to others	2,000,279	1,804,559
Total program services	<u>2,597,051</u>	<u>2,396,922</u>
Supporting services:		
Management and general	61,278	135,857
Fundraising	308,516	312,198
Total operating expenses	<u>2,966,845</u>	<u>2,844,977</u>
Operating (loss) income	<u>(856,740)</u>	<u>923,960</u>
<b>Nonoperating revenues (expenses):</b>		
Investment income	1,962,255	348,840
Change in present value of annuity receivable	(57,524)	(11,178)
Change in present value of deferred gifts	(28,857)	309,522
Total nonoperating revenue (expenses)	<u>1,875,874</u>	<u>647,184</u>
Income before net contributions	1,019,134	1,571,144
Contributions	199,583	145,985
Distributions	(62,562)	(80,422)
Net contributions	<u>137,021</u>	<u>65,563</u>
Increase in net position	1,156,155	1,636,707
Net position at beginning of year	<u>23,728,830</u>	<u>22,092,123</u>
Net position at end of year	<u>\$ 24,884,985</u>	<u>\$ 23,728,830</u>



FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION

**STAFF**

*President & CEO*  
Dr. Susanne Homant

*Senior Vice President*  
Guenevere Crum

*State Director, Florida High School/High Tech*  
Allison Chase

*Assistant Director of Communications & Events*  
Ray Ford, Jr.

*Assistant Director, Donor Services & Administration*  
Mary Jo Hatala

*Manager, Internships & Mentoring Programs*  
Joseph D'Sousa

*Assistant Director, Finance*  
Michelle Young

*Executive Assistant to President & CEO*  
Jessica Miller

*Administrative Assistant*  
Antoinette Barber

**PROGRAM CONSULTANTS**

*Florida Youth Leadership Forum*  
Carolyn Pardue

*Florida High School/High Tech*  
Donna Mundy

*Financial Consultant*  
Bruce Hagan

*The Able Trust (incorporated as the Florida Endowment Foundation for Vocational Rehabilitation, Inc.) is a 501(c)(3) foundation established in 1990 by the Florida Legislature, privately incorporated as a charitable organization.*

*The mission of The Able Trust is to be a key leader in providing Floridians with disabilities opportunities for successful employment.*



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(850) 224-4496 FAX

**[www.abletrust.org](http://www.abletrust.org) | [www.lookatmyability.org](http://www.lookatmyability.org)**



Outcome Summary Data

Florida High School High Tech Program

June 30, 2014

## 2013-2014 Q4: April, May, June

1. Total Number of high schools involved in project	<b>98</b>
<i>Referring to graduating students</i>	
<b>Total:</b>	<b>352</b>
2. Number of graduates with a standard diploma	<b>212</b>
3. Number of graduates with a special diploma	<b>101</b>
4. Number of graduates with a certificate of completion	<b>1</b>
5. Number of graduates with a GED	<b>5</b>
6. Number of graduates who have completed a Postsecondary Work Experience Program	<b>33</b>
<i>Referring to graduating students</i>	
<b>Total:</b>	<b>355</b>
7. Number of graduates entering - Community College	<b>107</b>
8. Number of graduates entering - 4 yr. College	<b>18</b>
9. Number of graduates entering - Technical School	<b>41</b>
10. Number of graduates entering the Military	<b>7</b>
11. Number of graduates entering employment full/part time	<b>43</b>
12. Number of graduates continuing as 5th year seniors	<b>49</b>
13. Other	<b>19</b>
14. Undecided	<b>71</b>
<i>Referring to all students</i>	
15. Total number of students in all grades who entered employment during this year full/part time	<b>156</b>
16. Total number of students who received the Florida Ready to Work Credential	<b>29</b>
17. Total number of students in all grades who dropped out of high school this year	<b>4</b>



**The Florida High School High Tech Program  
FY 2014, 3rd QTR**

	<b>HSHT Site</b>	<b>Number of Enrolled Students</b>
1	Alachua County (Gainesville)	23
2	Alachua County (Rural)	22
3	Baker County	20
4	Bradford County	15
5	Brevard County (Bayside HS)	75
6	Brevard County (Heritage HS)	15
7	Broward County	98
8	Charlotte County	23
9	Clay County	16
10	Collier County	26
11	Columbia County	18
12	Dixie County	27
13	Duval County	52
14	Escambia County	52
15	Fostercare Pilot	24
16	Gadsden County	16
17	Gilchrist County	23
18	Gulf County	17
19	Hendry/Glades Counties	28
20	Hillsborough County	37
21	Lake County	16
22	Lee County	29
23	Leon County	16
24	Levy County	17
25	Madison County	23
26	Manatee County	16
27	Marion County	24
28	Miami -Dade County	51
29	Miami-Dade Expansion	19
30	Nassau County	26
31	Orange County	128
32	Palm Beach County	95
33	Pinellas County	21
34	Polk County	16
35	Putnam County	17
36	Sarasota County	15
37	St. Johns County	17
38	Union County	18
39	Wakulla County	16
	<b>TOTAL</b>	<b>1207</b>

## Florida High School/High Tech Section I Report

	Never Worked	Not Currently Working	Currently Working	Part Time	Full Time	Avg Hourly Wave	Receiving Health Ins
<b>2013-2014</b>	<b>843</b>	<b>149</b>	<b>190</b>	<b>183</b>	<b>11</b>	<b>6.53</b>	<b>55</b>
<b>Q4: April, May, June</b>	<b>843</b>	<b>149</b>	<b>190</b>	<b>183</b>	<b>11</b>	<b>6.53</b>	<b>55</b>
Alachua	12	0	2	2	0	7.93	0
Alachua Rural	14	0	0	0	0	0.00	0
Baker	14	2	2	2	0	7.88	0
Bayside	69	0	2	2	0		0
Bradford	11	0	2	1	1	7.79	1
Broward	65	15	20	20	0	8.00	0
Charlotte	19	5	5	2	2	9.00	0
Clay	11	0	4	4	0		0
Collier	26	0	0	0	0		0
Columbia	14	0	0	0	0		0
Dixie	17	0	0	0	0		0
Duval	36	1	4	4	0	8.40	0
Escambia	25	18	0	0	0	0.00	48
Foster Care	21	0	3	3	0	8.28	0
Gadsden	17	0	0	0	0	0.00	0
Gilchrist	12	1	3	3	0		0
Gulf	14	0	2	2	0		0
Hendry/Glades	31	0	0	0	0	0.00	0
Heritage	14	0	1	1	0		0
Hillsborough	17	0	17	16	1	8.00	1
Lake	11	0	4	4	0	6.33	0
Lee	23	2	5	5	0	8.50	0
Leon	19	12	6	5	1		0
Levy	14	0	1	1	0	7.93	0
Madison	21	0	0	5	0	8.00	0
Manatee	13	0	3	3	0	7.99	0
Marion	23	0	0	0	0	0.00	0
Miami-Dade	26	1	0	0	0		0
Miami-Dade Expansion	16	2	0	0	0		0
Orange	86	81	38	38	0	8.00	0
Palm Beach	42	2	51	45	6	9.00	4
Pinellas	18	0	3	3	0	8.00	0
Polk	8	2	3	3	0	7.93	0
Putnam	16	0	1	1	0	7.67	0
Sarasota	9	1	5	5	0	8.62	1
St. Johns	14	0	2	2	0	10.00	0
Union	15	0	0	0	0		0
Wakulla	10	4	1	1	0		0
<b>GRAND TOTALS</b>	<b>843</b>	<b>149</b>	<b>190</b>	<b>183</b>	<b>11</b>	<b>6.53</b>	<b>55</b>

Number of Partners Number of Youth Employed	2013		Total
	Q4	Total	
Agriculture, Forestry, Fishing, and Hunting	13	13	13
Mining	2	2	2
	0	0	0
	0	0	0
Utilities	7	7	7
	0	0	0
Construction	8	8	8
	2	2	2
Manufacturing	6	6	6
	5	5	5
Wholesale Trade	0	0	0
	0	0	0
Retail Trade	41	41	41
	57	57	57
Transportation and Warehousing	12	12	12
	6	6	6
Information	1	1	1
	0	0	0
Finance and Insurance	8	8	8
	1	1	1
Real Estate and Rental and Leasing	2	2	2
	0	0	0
Professional, Scientific and Technical Services	24	24	24
	2	2	2
Management of Companies and Enterprises	2	2	2
	0	0	0
Administrative and Support and Waste Management and Educational Services	4	4	4
	1	1	1
	64	64	64
	15	15	15
Health Care and Social Assistance	44	44	44
	8	8	8
Arts, Entertainment and Recreation	32	32	32
	23	23	23
Accommodation and Food Services	34	34	34
	50	50	50
Other Services (except Public Administration)	28	28	28
	9	9	9
Public Administration	19	19	19
	1	1	1
<b>Total</b>	<b>349</b>	<b>349</b>	<b>349</b>
	<b>182</b>	<b>182</b>	<b>182</b>



**The Able Trust**  
3320 Thomasville Road, Suite 200  
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**Toll-Free (888) 838-2253**  
**Phone (850) 224-4493**  
**Fax (850) 224-4496**  
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**Goodwill Easter Seals of the Gulf Coast**

- ESCAMBIA COUNTY HSHT PROGRAM  
(Pensacola Boys' Base – DJJ Facility)

15 East Brent Lane  
Pensacola, FL 32503  
850.438.3930 Phone  
Fax: (850) 432-9853

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**Ronald Rivera, HSHT Program Coordinator**

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**Terri Bolin, VP Mission Services**

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**Dyslexia Research Institute**

- GULF COUNTY HSHT PROGRAM

5746 Centerville Road  
Tallahassee, FL 32309  
850.893.2216 Phone  
850.893.2440 Fax

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**Melissa Behee, HSHT Program Coordinator**

[melissabehee@gmail.com](mailto:melissabehee@gmail.com)

**Ability 1<sup>st</sup>**

- LEON COUNTY, GADSDEN COUNTY,  
WAKULLA COUNTY HSHT PROGRAMS

1823 Buford Court  
Tallahassee, FL 32308  
850.575.9621, Ext. 107  
850.575.5740 Fax

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**Sharon Scherbarth, Wakulla Project Co-Coordinator**

[sharon.scherbarth@wcsb.us](mailto:sharon.scherbarth@wcsb.us)

**Madison County School Board**

- MADISON COUNTY HSHT PROGRAM

2649 West US Highway 90  
Madison, FL 32340  
850.973.5061 Ext. 147 Phone  
850.973.5066 Fax

**Deborah Simmons, HSHT Program Director**

[dsimmons@madison.k12.fl.us](mailto:dsimmons@madison.k12.fl.us)

**Mike Radell, HSHT Co-Director**

[radelm@madison.k12.fl.us](mailto:radelm@madison.k12.fl.us)

**CareerSource Florida Crown**

GILCHRIST, COLUMBIA, DIXIE & UNION  
COUNTIES HSHT PROGRAMS

CareerSource Florida Crown  
1389 Highway 90 West, Suite 170  
Lake City, FL 32055  
386.755.9026 Phone  
386.487.1218 Fax

**Elizabeth Wetherington, HSHT Project Supervisor**

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**Robert Jones, Executive Director**

[rjones@careersourceflcrown.com](mailto:rjones@careersourceflcrown.com)

**Independent Living Resource Center of  
Northeast Florida**

- DUVAL, BAKER, NASSAU, ST. JOHN'S  
CLAY HSHT PROGRAMS

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**2013-  
2015**



# **THE ABLE TRUST STRATEGIC PLAN:**

**EMPOWERMENT, EDUCATION, EMPLOYMENT**



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Summary of Employment Statistics – 9/27/2012  
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HSHT Historical Growth 2005 – 2012  
Building Awareness Summary 9/27/2012



# **EXECUTIVE SUMMARY**



## **The Able Trust Strategic Direction**

### **Planning Period, CY 2013 – 2015**

#### Executive Summary:

The Able Trust Board of Directors met twice in 2012 to discuss the strategic direction for the organization for the next two-three years. On June 14, the Board, staff members and some Ambassadors and invited guests met in Tallahassee to begin the planning process during Leadership Summit I. During that meeting, two important presentations were made, both of which provided detailed information on the jobs of the future and the business needs of the future. These presentations were important because the information is critical to activities The Able Trust needs to undertake and support to assure a match between employer needs and the skill-sets for people with disabilities who elect to seek employment in Florida.

Dr. Dale Brill, then-President of the Florida Chamber Foundation, provided a well-supported overview of the projected jobs of the future, along with a report on the discussions that are a part of the Governor's Blue Ribbon Task Force on Higher Education. Dr. Brill reported that tourism in Florida is rebounding, with FY 2012 a record year for that industry. He also commented on the jobs that seem to be more prevalent in other countries (manual, routine tasks) and those that command the highest salaries anywhere (manual, non-routine – such as surgeons, high level programmers, etc.) Although more than 50% of the jobs available in the businesses of the future will require postsecondary training by the end of the decade, many of those jobs will require a community college degree as compared to a Bachelor's degree or higher.

Vesselka McAlarney, Manager of OES & Employment Projections for the Florida Department of Economic Opportunity (DEO) presented the results of a number of analyses that DEO conducts in its Labor Market Statistics Center to project employment and develop estimates of Florida workforce needs. She provided extensive data that projected job growth beyond economic recovery through 2020. The DEO is estimating over 1 million new jobs by 2020, some of which will be "regained" jobs, as industries like construction will revive and hire laid-off workers. These regained jobs will make up more than 50% of the new job projections. The top industry sectors that will experience job growth beyond recovery are: Education; Health Services; Leisure & Hospitality; Trade, Transportation & Utilities. She reported that a vast majority of job openings will require an Associate's Degree or certification, with approximately 15% of new jobs requiring a Bachelor's or higher degree. All ten occupations that are expected to gain the most jobs are in the service industry. It is important to note that the DEO studies and analyses support the Chamber Foundation information, as well as business projections from some sources such as The Florida Trend. Additionally, the emphasis on the service industry is important, because Able Trust research indicates that service industries are more likely to hire people with disabilities than are manufacturing concerns.

Discussion by Able Trust leadership during this session centered on the need to better communicate the Able Trust mission to businesses, with messaging centered on the talent for jobs of the present and the future that is available in the workforce made up of people with disabilities. Discussion also occurred on the responsibility of The Able Trust to identify and support those organizations that will promote the development of the skills that are and will be in demand, to people with disabilities and the entire disability network in Florida.

On September 27, 2012, the Able Trust Board hosted the second of its two strategic planning sessions for the subject planning period. This session was structured to concentrate on the need to better brand The Able Trust statewide, and was facilitated by Mark Sedway of Sedway Associates, a nationally known philanthropic organization consultant with published expertise in philanthropic communications. The primary goal was to generate ideas and consensus on a sharpened communications strategy. During that session, the issue of The Able Trust being a part of the greater movement of getting more people with disabilities to work was recognized, with The Able Trust emphasis of successful employment and “good-fit” jobs as a significant part of its leadership role. The group discussed the current status of The Able Trust in key categories of organizational activity, and where the organization should aspire to go. A summary of those discussions (“Where we are . . . Where we need to be”) is presented in the following pages.

Discussion focused on using a variety of messaging and communications to better develop knowledge of The Able Trust’s mission and its work in that regard, to identify the audiences that are most important to reach, and to define metrics to use as benchmarks in measuring success. Mr. Sedway presented commentary on the importance of concentrating on the mission, and social issues of jobs for Floridians with disabilities, as opposed to success stories as the singular goal of a communications effort. The group agreed a mission-centered theme for future communications was critical for change, as opposed to a focus on events.

The following general concepts represent the strategic direction that was identified in the strategic planning sessions and in Committee discussions.

1. Grant awards should continue at a different level than in the past, with more emphasis on larger, multi-year grants that are directly linked to advancement of the mission of The Able Trust.
2. The Able Trust should continue its internal, youth programs, contingent upon providing outcome data that supports the resources dedicated to the programs and the programs continue to contribute to the mission.
  - Florida High School High Tech
  - Florida Youth Leadership Forum
3. The Able Trust should continue its efforts to expand work experiences for job seekers, which might include job shadowing, mentoring, internships, or other related activities. Annual outcome data will be required to support the continuation of these efforts.
4. The Able Trust should embark on a 2 – 3 year statewide communications plan, directed towards business, and designed to change misperceptions and increase the number of people with disabilities who are successfully employed. The plan will be designed to also positively influence work experience opportunities, public policy, and the financial sustainability of the organization.

In the process of developing and implementing the strategic direction for The Able Trust for the next planning period, the following three questions will guide tactical decisions.

- I. How does this activity and use of our resources advance our mission – our litmus test? (Disproportionately Influential)
- II. Is this investment of our resources, an investment in the change we desire? (Catalytic Philanthropy)
- III. Does this activity promote The Able Trust as a key player in Florida in a greater national movement of equal opportunities for successful employment for all people with disabilities?

The four strategic areas are covered in more detail in the pages that follow, along with three options for the communications plan, that require different levels of funding and the related Board approval. In order to measure return on investment of Able Trust resources, the organization will need to define “successful employment” at the beginning of the planning period.



STRATEGIC PLANNING 2013 – 2015  
SESSION PARTICIPANTS

June 14, 2012

Board of Directors and Officers:	Jeannie Amendola Bob Butterworth Richard Cole JR Harding Susanne Homant Bridget Pallango Anne Marie Taglienti
Ambassador: Staff:	Eladio Amores Allison Chase Guenevere Crum Kathryn McManus Jessica Taylor
Guest:	Barbara Cole
Presenters:	Dale Brill, Florida Chamber Foundation Vesselka McAlarney, Department of Economic Opportunity

September 27, 2012

Board of Directors and Officers	Jeanne Amendola Marcy Benton Richard Cole JR Harding Susanne Homant Bridget Pallango
Ambassadors:	Eladio Amores Bob Bromberg
DVR Director:	Aleisa McKinlay
Staff and Consultants:	Allison Chase Guenevere Crum Ray Ford Lisa Hall Kathryn McManus Jessica Taylor
Guests:	Les Goldman Sarah Goldman
Facilitator:	Mark Sedway, Sedway Associates and Philanthropy Awareness Initiative

**The Able Trust – Summary of planning direction  
March 8, 2013**

**Where we are** .

**Values**

Charity mindset: give away \$

**Responsive**

Transactions: respond to grant proposals

**Needs Focused**

Funding grantee-defined needs

**Short Term**

\*most one-year grants

**Reports**

\*Managerial

**Relationships**

\*Grantee relationships are primary

**Where we need to be** .

**Values and ROI**

Investing in the greater movement

**Proactive & Responsive**

\*Adding larger, programmatic grants  
\* Continuing HSHT in a manner that  
Improves career outcomes  
\*Add relationships to transactional actions

**Outcomes focused**

\*Data-driven  
\*Centered on issues directly related to mission

**Short & Long Term**

\*Also include multi-year grants  
\*Seek investment in change

**Knowledge**

\*Leadership to advance movement

**Long term collaborations**

\*Connect long term strategy with Florida  
business goals  
\*link philanthropic impact to business success

## The Able Trust Communication Plan

1/1/2013 – 12/31/2015

**Strategy:** The Able Trust should embark on a 2 – 3 year statewide communications plan, directed towards business, and designed to change misperceptions and increase the number of people with disabilities who are successfully employed. The plan will be designed to also positively influence work experience opportunities, public policy, and the financial sustainability of the organization.

The Able Trust leadership, both from the governance perspective and operational perspective, has discussed the challenges of becoming a known statewide entity dedicated to the employment of people with disabilities. The Foundation is unique to Florida in what it does, its sources of revenue, and its approach to its mission through internally-operated youth programs and support of external programs which are grant awards to community organizations that operate employment-directed programs for people with disabilities at the local level. A fundamental part of this strategy is to move away from focusing on an event-centered communications philosophy to a change-centered consistent messaging, focusing on what we do, not what we give. For example, one of our current messages is to publicize the dollar amount of grants we have awarded (“we have awarded more than \$30 million since our beginnings in 1990”). In order to change perceptions, increase work experiences and play a significant role in increasing the number of people with disabilities who are successfully employed, we want to deliver messages such as “The Able Trust helped to put XXX people with disabilities to work last (year). . .” A review of other Foundation messaging in Florida and elsewhere supports this direction, as most Foundations communicate in terms of output and area of focus. The focus of The Able Trust is employment for people with disabilities, and the output is successful employment, which must include skills that employers need and equally include opportunities that are satisfying to employees.

Importantly, leadership of The Able Trust has agreed that the primary target audience for its short and long term communications emphasis is business, as that is where the jobs are. It is assumed that the secondary communication markets of government and the general public will also be reached if businesses begin to change perceptions and make more job opportunities available to job seekers with disabilities. Businesses targeted will include both for-profit and non-profit, and should emphasize service-related industries, per recent Able Trust research. Perception change is a lengthy process, must stand up under scrutiny (the message delivered must be credible), and primary messaging should be consistent and similarly used in all resources. Per a recent marketing study, messages need to be repeated at least six times before people begin to remember the message. Key steps to an effective communication plan for The Able Trust are as follows.

Step I: Define Successful Employment so that it can be identified and measured, allowing The Able Trust to collect data to determine return on investment. Identify a consistent means of measuring outcomes.

Step II: Fully adopt, by July 1, 2013 conversion to the Foundation’s new tag line, “*Empowerment, Education, Employment*”. Complete retirement of the current tag line of “*Because people want to work.*”



Step III: Identify a group of up to 100 businesses that will become the target for Able Trust communications and relationship building activities over the planning period.

Step IV: Develop and implement a relationship-building plan that includes Board, Ambassadors and staff, and grantees where possible. Create a “champion” process that equips others to speak about The Able Trust.

Step V: Design, fund and implement a communication campaign that will reach the selected businesses and their leadership, targeting major Florida markets, and incorporating both paid and earned media.

Step VI: Measure employment outcomes of all programs (data collection) and update regularly on a website dashboard.

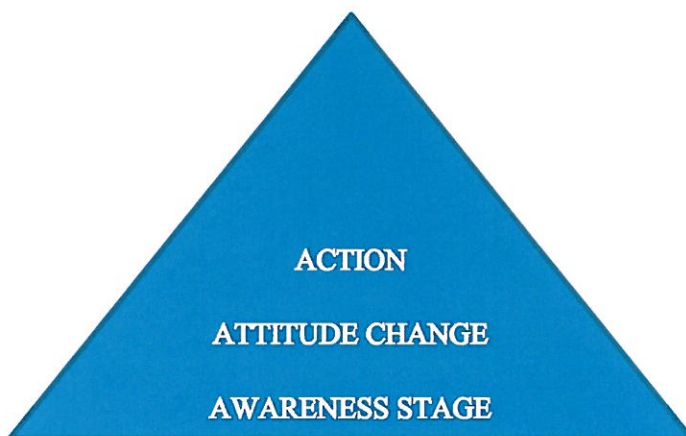
The most challenging part of this strategy is to build relationships with key businesses around the state, which is fundamental to changing perceptions about the talent within the workforce that is made up of people with disabilities. The most costly part of the strategy is the paid communications campaign. As discussed at the planning sessions, three spending tiers are presented for funding consideration, with increased outcomes expected as more funds are dedicated to paid media, properly placed.

Work experiences also help to guide job seekers towards jobs of the future, as they learn about skill sets needed for a chosen career path. This will greatly assist students with disabilities in designing their studies so that they acquire the basic skills they need to be marketable to employers, thus communication messages should include the availability of such options for businesses.

The following page contains a chart depicting the five areas that will be addressed with a comprehensive communication plan, with the changing of perceptions as the first area of emphasis. Research on communications effectiveness concludes that change happens in the order of *Awareness, Attitude Change, and Action*. The four areas that follow perception change on the chart are all action areas.

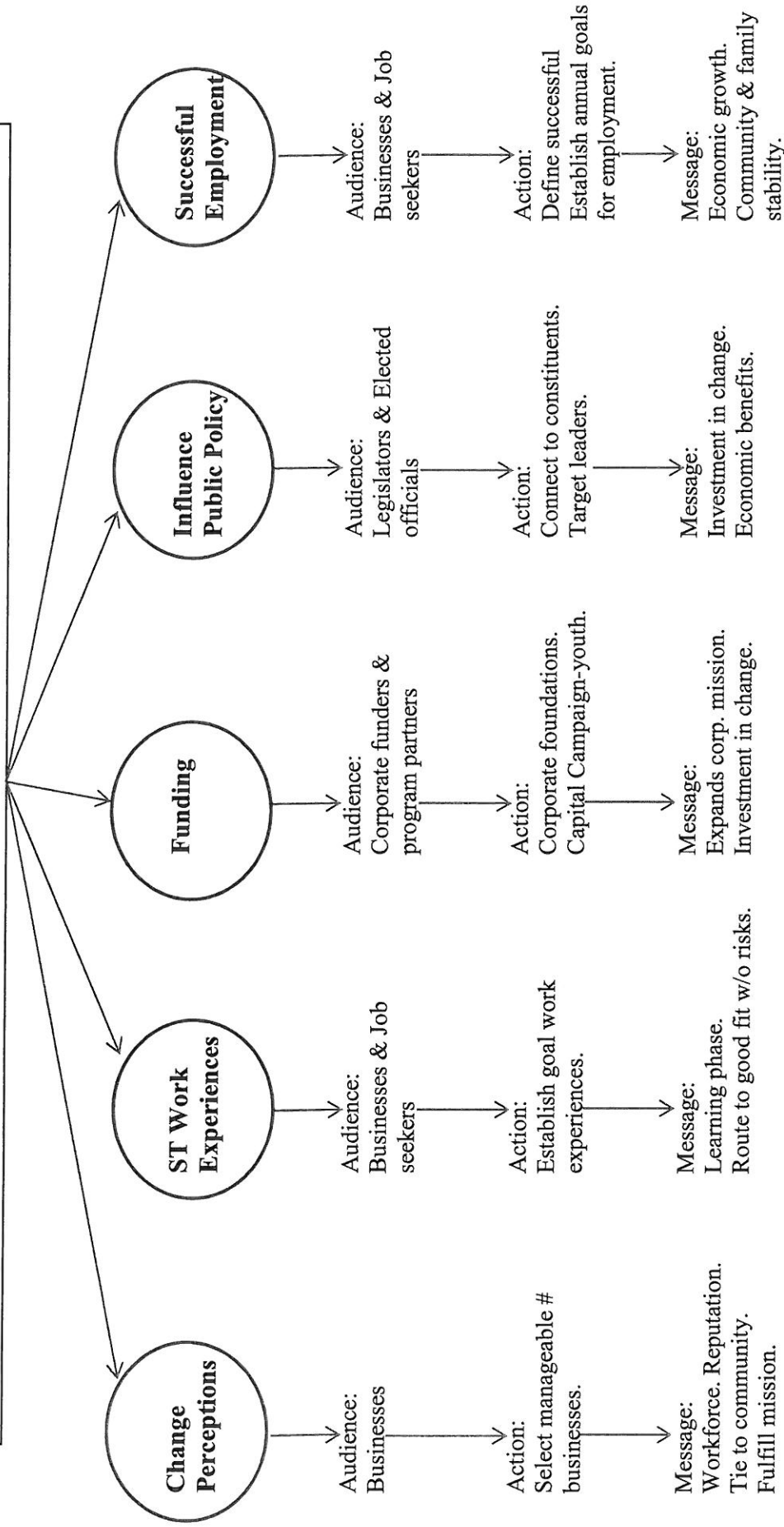
A plan to address the five areas is presented on the following pages, with accompanying estimated costs to fund three different options. The plan will be designed to:

1. Enhance and strengthen The Able Trust mission through a powerful messaging platform;
2. Enhance its leadership role in fostering partnerships that address the mission;
3. Connect more businesses and people with disabilities at the employment level that fits the needs of businesses and matches skill sets to employment opportunities.



# The Able Trust

MISSION: To be a key leader in creating opportunities for successful employment for Floridians with disabilities.



Important to have one "tag" line in all communications, descriptive of what Able Trust does.  
 Selected tag line is:

## *Empowerment, Education, Employment*

Although the new tag line does not address disabilities specifically, it does clearly state the journey to achievement of The Able Trust mission. Not a factor in the change but noteworthy, the former tag line was far less descriptive of the work of the Foundation.

## Communication Plan \* \* \* Three funding levels

**Presented with three levels of activity and funding**  
**All three levels assume a change of The Able Trust tag line to**  
***Empowerment, Education, Employment***

### **Option One (will produce minimal perception change)**

1. Select **25** key businesses to target for awareness change and relationship-building
2. Continue event promotion (YLF, October DEAM/DMD, Ability Awards) with a higher concentration of media dollars in the **October campaign**, beginning with September media and a statewide launch in central Florida. Paid media should be only focused on businesses.
3. Continue presence on public radio's Capitol Report: every Friday during the year and each week night during session.
4. Continue selected grant award awareness through the "CEO – CEO campaign".
5. Prepare presentation materials/playbook for Board & Ambassador presentations and business relationship building as mutually assigned and agreed.

Estimated media cost: \$120,000

Estimated PR cost (staff or contracted): \$65,000

Estimated material development cost: \$12,500

**Total, option one: \$197,500**

### **Option Two**

1. Select **50** key businesses to target for awareness change and relationship-building.
2. Develop and implement a **3-month** communication campaign for September – November, with no specific event promotion that is not a part of the 3-month campaign except light releases on the Ability Awards. Use YLF stories to begin the September campaign, which is generally the time they have been printed/aired in the past. Do not conduct event-specific campaigns. Paid media should be focused on business as per Level One.
3. Continue presence on public radio's Capitol Report as per Level One. **Add sponsorship** of one public radio program in major media markets throughout the state. An example might be sponsorship of the 7 AM morning drive-time news in the five primary metropolitan areas of Florida, or one of the popular weekend programs.
4. Continue CEO-CEO grant award awareness as per #4 on Level One.
5. Presentation materials and assignments per #5 on Level One.
6. **Formalize, populate, and promote an Able Trust Youth Programs Alumni Association.**

Estimated media cost: \$187,500

Estimated PR cost (staff or contracted): \$85,000

Estimated material development cost: \$20,000

Cost to establish formal youth alumni association: \$15,000

**Total: \$307,500**

### **Option 3**

1. Select **100** key businesses to target for awareness change and relationship-building.
2. Develop and implement two **3-month communication campaigns**; one for February, March, April (during legislative session) and the other for September – November, with no specific event promotion that is not a part of the 3-month campaign except light releases on the Ability Awards. Use YLF stories to begin the September campaign, which is generally the time they have been printed/aired in the past. Do not conduct event-specific campaigns. Paid media should be focused on business as per Level One, adding a public policy **additional** focus for the spring campaign.
3. Numbers 3 – 6 as per Option 2.

Estimated media cost: \$267,500

Estimated PR cost (staff or contracted): \$95,000

Estimated material development cost: \$25,000

Cost to establish formal youth alumni association: \$15,000

**Total: \$402,500**

Media will include paid media (print and electronic), earned media, and some use of social media. It was the recommendation of Facilitator Sedway that The Able Trust use its website more efficiently to “push in” information online, and social media like Twitter and email to “push out” information to large audiences in a timely manner.

All of the above options will require a more efficient use of Able Trust’s human resources, and with Options 2 & 3, a part time position may be feasible, as opposed to contracting all activities to a consultant. All will require printing and production costs, of \$25,000 - \$50,000 per year, depending on option selected.

Continuation of The Able Trust Grant Program,  
outside of High School High Tech Grant Awards

2013-2015 Strategic Plan

**Strategy:** Grant awards should continue at a different level than in the past, with more emphasis on larger, multi-year grants that are directly linked to advancement of the mission of The Able Trust.

During the planning sessions for planning years 2013-2015, there was little discussion about the continuation of Able Trust’s Grant Program, as the enabling statutes for The Able Trust and its federal 501(c)(3) status clearly require the Foundation to be a grant-making organization. Thus, the Communication Plan options all contain a continuation of promotion of grant awards, although on a selected basis.

However, there has also been a nearly two-year effort to evolve the grant process to more effectively address the current environment, what the Foundation has learned about jobs of the future, and a desire to make sure that The Able Trust’s investment in change through its grants program actually does work to place more people with disabilities in successful employment. This sea change in the Foundation’s grant philosophy has evolved to a recommended plan for one annual grant period directed at larger, multi-year grants to support career placement for people with disabilities who have moved to post-secondary degrees and certifications, and two grant periods for smaller one-year grant awards. The recommended change will also require that all grantees assist The Able Trust in collecting and reporting outcomes to include but not be limited to number employed, type of positions obtained, hours worked, and hourly wages or salary, plus contact information. This will provide data to The Able Trust and its supporters on key outcomes, plus will allow the Foundation to ascertain the most beneficial program activities of grantees, for future award purposes as well as training and publication of results to assist others.

The Able Trust currently collects some quantitative data, with some archived information presented below, from the 2004-2005 Strategic and Action Plan of the Foundation. It is important to note that The Able Trust has not collected data on the length of employment for any of the “persons employed” nor has it connected with grant award participants to determine program benefits and importantly, whether those served are still employed.

From archives (all statistics are for closed grants, and do not include HSHT grants):

YEAR	# PERSONS SERVED	# PERSONS EMPLOYED
2000	3,383	1,244
2001	1,118	485
2002	9,724	8,073
2003	2,191	693
2004	436	159

There are clear concerns with the numbers and the likely lack of consistency in reporting in the past.

From a quick study of data now on hand for two most recent years with more data available, not including HSHG grants:

YEAR	# SERVED	# EMPLOYED	AVERAGE HOURLY WAGE
2010	2057	427	\$9.48
2011	521	125	\$10.13

Note that the employment figures are reported by the grantees and not audited.

The data available do not report average hours worked per week per placed individual or the length of employment, important statistics for analysis of successful employment. As the grant program continues, output data and means of collection will be clearly identified in grant award contracts. Data collected and the subsequent statistical analyses will provide return on investment information for The Able Trust’s messaging. Additionally and importantly, the ability to maintain contact with hopefully a majority of those employed through the grant activity, will allow for studies of effectiveness of the programs beyond short term.

Included below is an excerpt from an article entitled “Move Over, 5% and Let Mission Drive”, which explains the 5% requirement that The Able Trust is subject to, in order to maintain its IRS status.

**The History of 5%**

**Prior to 1969**, the federal government had little control over how foundation funds were used or managed. With the Tax Reform Act of 1969, Congress responded to concerns that had been raised for decades regarding the size of assets in foundations and the role they played in society.

The Act prohibited self-dealing by foundations, regulated their grants to individuals, restricted their ownership of businesses and limited their involvement in legislation and political campaigns. It also taxed foundations for the first time and required that they distribute the greater of their total investment income or 6% of their assets to grantees each year. Later legislation changed the distribution policy to 5% of a foundation’s net assets.

The Able Trust **must** include its grant making activities in any strategic plan. The challenge is to make sure the grant awards are directly related to the mission and produce the outcomes that are required. Each grant award recommendation to the Board by either of the Grant Committees should be presented with a statement on how the grant will positively impact the mission of The Able Trust.

# **Strategic Direction for High School High Tech and the Florida Youth Leadership Forum 2013-2015 Strategic Plan**

**Strategy:** The Able Trust should continue its internal, youth programs, contingent upon providing annual outcome data that supports the resources dedicated to the programs and the programs continue to contribute to the mission. The youth programs of The Able Trust are:

- Florida High School High Tech
- Florida Youth Leadership Forum

The Foundation operates two youth-oriented programs that are staffed and managed from the headquarters office in Tallahassee. The Florida High School High Tech program has been under the operations of The Able Trust since 1998, and the Florida Youth Leadership Forum was developed by The Able Trust and has been operated continuously for 14 years. These are mainstay internal programs of The Able Trust, with a general goal of helping high school students with disabilities in the transition from high school to post-secondary education and training, and eventually employment.

The HSHT program has been measured by its success in achieving a low drop-out rate, by a significant number of its students that elect further education or employment or both after high school, improvement in their participation in education, vocational and employment related activities, and generally perceived community and family satisfaction with the program. The program is funded approximately 25% through an annual appropriation from the state legislature, which must be renewed each year, and the balance of the program costs are funded by Able Trust resources and fundraising. A multi-year funding study is provided in the appendix. The HSHT program alumni have not been studied to determine if the program has a longer term, positive affect on their ability to obtain successful employment, however there is an assumption that graduation and movement on to desirable post-secondary education and work experiences satisfies the mission. To test this assumption and determine the employment benefits to HSHT students, The Able Trust has commissioned an independent study which is currently underway. Results of that study are expected by the September Board meeting, and are anticipated to be usable as a benchmark for program outcomes. Given the number of jobs available at any given time in the state of Florida that go unfilled, an assumption can be made that the perceived disconnect between education and employment for the population as a whole exists also for students with disabilities.

The HSHT program also serves as a feeder program for a significant number of participants in the annual, four-day Youth Leadership Forum (YLF). Other participants are referred to YLF by high school counselors and ESE teachers. The Forum dedicates several hours during the four days to career exploration, and informational sessions on education options for post-high school choices. The students in this program have created an informal alumni association so they are easier to find, contact, and study than HSHT graduates who do not participate in YLF. Additionally, several graduates return to the program each year as mentors, and share their successes, allowing for the informal collection of post-graduation activities. However, The Able Trust has no refined data on the long term benefits of YLF participation, as those benefits translate to career development and employment. The YLF program is funded entirely through donations, grants, and other Able Trust funds

The Board has expressed a desire to support the continuation of the HSHT and YLF programs, provided the data on outcomes annually supports the programs' use of Able Trust resources, through a direct relationship to its mission of successful employment for job seekers with disabilities. The four strategies recommended for the HSHT & YLF programs are as follows.

1. Continue both programs for FY 2014, adding new HSHT programs if legislative activity provides funding for continuation and additions.
2. Complete the independent longitudinal study of HSHT graduates, and use that data to identify benefits and gaps in the program(determine what was useful and not useful in the program.)
3. Commission a similar longitudinal study for YLF graduates to determine the benefits of that program and the connection to The Able Trust mission.
4. Develop a formal YLF/HSHT Alumni Association to establish a means of maintaining connections and collecting data on outcomes, as well as a source of support for The Able Trust.

It should be noted that the 35 HSHT programs are funded locally through grants awarded by The Able Trust. These grants count towards the 5% grant award minimum required by the federal government.



Florida Youth Leadership Forum  
EMPOWERMENT | EDUCATION | EMPLOYMENT



## Work Experience Strategy 2013-2015 Strategic Plan

**Strategy:** The Able Trust should continue its efforts to expand work experiences for job seekers, which might include job shadowing, mentoring, internships, or other related activities. Annual outcome data will be required to support the continuation of these efforts.

In 2010, The Able Trust conducted research to help identify barriers to the employment of people with disabilities which identified work experiences such as internships as a critical activity in accomplishing two goals. One, to assist businesses in becoming acquainted with the work skills and capabilities of people with disabilities; and two, to help job seekers gain knowledge about a particular business or industry and possibly to gain valuable work experience. Other studies, particularly a number of studies analyzing internships for college and university students, support the value of work experiences in directing job seekers to a career that addresses their skills and areas of interest. Finally, the Governor's Commission on Jobs for Floridians with Disabilities has heard commentary from several businesses indicating a willingness to provide work experiences as a means of gaining knowledge of working with people with disabilities, and as part of their desired community involvement.

In response to this evidence, The Able Trust hired a Manager of Internships & Mentoring programs, who will work with young job seekers and selected businesses to increase the number of work experiences available to and accepted by people with disabilities. The Manager will work with leadership of The Able Trust to secure work experiences that are likely to directly affect career choice and skill development by job seekers with disabilities. The following objectives are a part of this strategy.

1. Businesses will be selected to coordinate with those targeted in the communications plan of The Able Trust. Work experience and internship training materials will be developed as requested and needed to assist businesses in the process of managing work experience opportunities.
2. Disability Mentoring Day will evolve to a position supporting year-round work experience opportunities for people with disabilities, with the annual highlight of this direction becoming a celebration of Disability Employment Awareness Month each October, rather than emphasis on one day. Disability Mentoring Day activities will continue as part of the work experience emphasis, and as a way to engage businesses in the process without requiring an initial lengthy commitment.
3. Business benefits of providing work experiences will be identified and promoted as part of the Communications Plan. Promotion may include business-specific recognition in promotional activities.
4. Data will be collected to measure the success of the work experiences each year, which will include but not be limited to numbers and types of work experiences, industries and businesses involved, satisfaction levels of participants, and areas for improvement.
5. Relationships will be nurtured with colleges, universities, and other post-secondary work-training entities to engage student disability offices in the work experience process.

A Work Experience Plan will be developed by staff to address these objectives, identify tactical activities, and assure coordination with the other three strategies of The Able Trust. Data collection and success measurement will evolve over time, as this new process is refined by experience.





# APPENDIX

## Summary of updated employment statistics

Department of Economic Opportunity (DEO) – Labor Market Statistics Center

Prepared for Able Trust Leadership Summit – September 27, 2012

*The following summary information is presented as an update to the information presented to the Able Trust Board of Directors at its Leadership Summit – Phase 1 meeting on June 14, 2012. These are updated statistics as of 9/7/2012, for the period 2012 - 2020.*

*The occupational projections presented are from a 2011 survey with over 55,000 employer responses.*

The DEO projects a continuing, prolonged sluggish recovery, with a projected unemployment rate of 6.5% in 2020.

There will be over 1 million new jobs in 2020 . There will also be “regained” jobs. In its analysis, the DEO projects that nearly 80% of its forecast will be the regaining of jobs lost in the recession.

The top five major industries 2012 – 2020:

1. Professional and business services
2. Education and health services
3. Trade, transportation and utilities
4. Leisure & hospitality
5. Construction (all are regained jobs)

The top industry sectors that will experience job growth beyond recovery, 2012 – 2020: these are jobs that will have the least amount of competition for workers.

1. Education and Health Services (with Ambulatory health services being the fastest growing subsector in this category.)
2. Leisure & hospitality
3. Distant 3-4: Trade, transportation & utilities; and Government

50% of new jobs, 2012 – 2020 will fall into five areas:

1. Clerical
2. Sales
3. Food Service
4. Healthcare professionals
5. Construction

Most change by total job increase, 2012-2020:

1. Office and Administrative: 132,864
2. Sales and Related: 112,945
3. Food Preparation & Service Related: 108,476
4. Healthcare practitioners & Technical: 85,238 (add Healthcare Support of 43,086, total is 125,324)

86% of job openings will require an Associate’s Degree or less:

10% will require a Bachelor’s Degree

4% will require a Master’s Degree

All ten occupations expected to gain the most jobs are in the service industry.



Leadership Summit, Able Trust Board of Directors  
June 14, 2012 and September 27, 2012  
**Public Funding Report**

The Statutes that define The Able Trust, its Articles of Incorporation and its Bylaws state that the Foundation must work on fundraising, raising its funds through federal and state dollars, private foundations and individuals. This language gives The Able Trust ample opportunity to seek funding from a great number of sources; however such activity requires a formal, planned system of fundraising and the human resources to accomplish the fundraising mandate.

Since its beginnings, The Able Trust has relied heavily on public funds for its operations and the growth of its endowment. Over the past 7 years, public funding in key areas breaks down as follows.

	<u>Civil Penalties (SBA)</u>	<u>DVR/ODEP</u>	<u>Parking Permits</u>	<u>Total</u>
2005	67%	5%	5%	77%
2006	66%	12%	4%	82%
2007	61%	11%	4%	76%
2008	59%	10%	2%	71%
2009	69%	9%	3%	81%
2010	62%	11%	7%	80%
2011	58%	11%	6%	75%
<b>Average:</b>	<b>63%</b>	<b>10%</b>	<b>4%</b>	<b>77%</b>

The support of The Able Trust through public funds has averaged 77%, a continuing heavy reliance on public funding, to the extent that financial health of the organization is a direct function of public dollars continuing to be available.

To address this issue, The Able Trust added a full time fund raiser staff position in 2011, and located that person in central Florida. Support staff for the position is located at Able Trust headquarters in Tallahassee.

Funding sources are varied and all are available to The Able Trust. This includes:

- Public dollars per above
- Grants from corporations
- Grants from foundations
- Corporate gifts
- Individual gifts
- Endowments



Leadership Summit, Able Trust Board of Directors  
September 27, 2012

**Granting Activities: Use of Able Trust Resources – Updated**

The financial and human resources of The Able Trust are split approximately equally in FY 2010 between its youth programs (High School High Tech, Youth Leadership Forum and Disability Mentoring Activities) and all other grants - those grants approved on a quarterly basis by the Foundation's Grant Committees. **This translates to approximately 44% of our dollars (including related fundraising costs) dedicated to programs that specifically serve citizens under the age of 19, and approximately 44% (including related fundraising costs) to programs that serve all other citizens of all ages and locations through grantees who receive an award.** Funds spent on administrative costs and all other fundraising amounted to 12% of total expenses.

Some history of the growth of HS/HT:

	<u># Programs</u>	<u>Public Funds</u>	<u>Able Trust Funds</u>
2005	21	\$152,800	\$254,900
2006	30	\$572,167	\$198,000
2007	31	\$500,000	\$352,500
2008	36	\$461,537	\$438,000
2009	36	\$328,292	\$459,762 (grant \$ only)
2012	35	\$315,160	\$806,000 (all costs)

The above numbers may need some slight adjustments but they are believed to be nearly accurate. HSHT is the largest of The Able Trust's "internal programs", and there is a clear trend to more financial support by The Able Trust over the years to all our youth programs (HSHT, YLF, and DMD). This is mostly due to both an increase in number of HSHT sites (67% increase) and a decrease in public dollars for HSHT from a high of \$572,167 in 2006 to \$315,160 in 2012 (45% decrease). The funding of YLF and DMD has also increased over this 5-year period, largely supported by Able Trust dollars. Staffing of the youth-related functions has also increased over the years.

This indicates a trend towards using more of The Able Trust resources for the youth programs, which sends a public message of where The Able Trust feels its resources are most productively spent. This is neither good nor bad; however continuing growth in the programs that generally service people under the age of 19 will take resources from other programs, and bears discussion by the Board.

The HSHT program has been in place at The Able Trust since 1996; YLF since 1999, and DMD since 2006.

2012

The Able Trust

Susanne F. Homant

**BUILDING AWARENESS:  
BOARD LEADERSHIP  
SUMMIT 2012**



## **Board Leadership Summit, September 27, 2012**

Building Awareness – Communications, branding, becoming better known, changing perceptions:  
Some thoughts, some history, some directions for consideration.

The Able Trust has been working to increase awareness of its existence, its mission, and to change attitudes related to the hiring of people with disabilities, probably since it began awarding grants in 1991. Throughout its history, The Able Trust has dedicated resources to a number of different communication activities and initiatives to, in a general sense, become better known. In the past, the following has occurred, listed with a perceived audience. Items that are more recent, and for which we have more data, are so noted.

1. Throughout the Trust's existence much emphasis has been placed on obtaining newspaper coverage which generally consisted of stories of young people who became employed in some capacity or were working to become employed, as well as stories and photos of grant checks being awarded. Data on outcomes and any internal tracking of return on investment (ROI) was not found. Perceived audience is general public, and not-for-profit organizations. (Behavior assumption: business hiring decisions and donor decisions are not made due to newspaper stories.)
2. Palm Beach Gala, several years through 2009 – marketing to Palm Beach community, especially higher level social circles. Audience: middle to upper middle class residents of the Palm Beach area. Donor recruitment and endowment goals. Increased awareness with a few corporations, did not produce any endowments.
3. Ability Celebrations in Orlando in 2010 and 2011, marketing to Central Florida. Audience – businesses and middle class residents of the greater Orlando area. Goal to raise awareness in Central Florida, along with other efforts. Jury is still out, some new individual donors identified.
4. Ability Awards Ceremonies and area receptions – various locations. Audience is generally specific to the purpose of the event. Awareness enhancement is minimal, marketing is minimal. Receptions have fostered a few new relationships. Participating in and assisting in BLN events from time to time was directed at building business relationships.

(Note: Promoting events is done in a variety of ways, using tools such as letters, calls, formal invitations, and whatever media is deemed to be affordable/budgeted. Press releases are common to all, but receive little placement, as a percentage of releases generated.)

5. Have consistently run short announcements on FSU Public Radio – Capitol Report (paid advertising, not PSA's). Every week night during session at 6:30 PM and non-session weeks on Friday night. Audience is legislators, lobbyists, and others interested in State legislative activity. This has produced more feedback on awareness of the name, The Able

- Trust, than perceived from other sources. Has been running for at least 6 years, with only short gaps in placement.
6. 2008: A Communications Audit was conducted by Moore Consulting Group that analyzed Able Trust Communications activities and made recommendations. Many of those have been incorporated, as funding has been dedicated. Notably, the Able Trust logo is now present as a part of all program logos – a strong recommendation of the Audit.
  7. Grant Press releases continue, along with letters to legislators on grants awarded in their areas. In 2011, began to add the CEO-CEO letters to selected grant awards, to inform businesses in the grantee community of the project The Able Trust is funding. Letters will be followed up with reports, 6 – 8 months after announcement letter. Audience: general public and select businesses in the area. Have received a small number of responses from the companies selected. ROI to be determined, but can measure by responses to letters.
  8. Grantor newsletter continues, 3/year. In place for several years, available electronically and in hard copy. Audience is general, with early audiences perceived to be grantees and organizations who might be interested in a grant and those organizations that support grantees, as well as a host of government agencies. Distribution has increased over the years. Readership is not known.
  9. Website continues, and is updated as staff resources allow. Audience is general public. Brochures and information packets have varied through the years.
  10. YLF promotion is generally stories, published in newspapers (now also electronic versions of newspapers.) Audience is the newspaper audience, general reading public, in the areas where participants live.
  11. Communications and relationship-building efforts with legislators have increased, with a goal of protecting public funding and of being considered for new public funding. Audience is legislators and their staff, and this communication task is very human resource/volunteer based-intensive.
  12. LAMA (Look at My Ability) Campaign: Appears to be the first full promotional campaign. Rights to LAMA purchased by Able Trust in 2009. With partners, promoted the hiring of PWDs through the state of Florida, as funding allowed. Targeted at businesses, had some (informally studied) effect when active. Was perceived to be under-funded and too short a campaign to create significant change in hiring practices. Included video, PSAs, website, design of brochures and posters to be used by BLNs, some business journal advertisements, and whatever free media was available. Many stories were submitted by PR firm, with rare placements.
  13. DMD & DEAM activities have occurred in the fall since 2006. Original emphasis was on an audience of younger workers, mostly HSHT students, with an emphasis on mentoring during a select time of the year, and helping to plan and fund career fairs. Emphasis expanded somewhat, beginning in 2011 when several partners helped to fund a short DEAM/DMD campaign. Some advertising (business journals and Florida Trend), additional use of LAMA materials. Businesses like the DEAM/DMD opportunities, and some include their activities in their internal communications. Thus the businesses involved became a potential new audience. In 2010-2011, the recommended minimum promotional budget was \$250,000 for a 2-3 month campaign, which was not available. (Note: the value of a one-time 2 month PR campaign is questionable.)
  14. There are at least two “tag lines” in place: “*Because People Want to Work*” and “*Look at My Ability*”. A new line on the YLF logo was also introduced in 2012: “*Empowerment, Education, Employment.*” (Note: it may be worth discussing settling on one tag line or a combination as communications move forward.)



In general, The Able Trust has experienced inconsistency in its communications efforts, its selection of audiences to target, the goals of the communications, the message delivered, and an assessment of the effectiveness of the efforts and the ROI. Potential goals of a full communications initiative might be to increase private funding of the organization; to increase public funding of the organization; to increase the number of businesses that hire people with disabilities; to obtain desirable grant proposals for awards; to lower the Florida unemployment rate for PWDs.

Recognizing that The Able Trust will not be able to fund a mass communications campaign now or in the foreseeable future, one audience or a limited number of audiences need to be identified as the target audience(s) for the next planning period. Based on research by a number of entities, any awareness and branding efforts take longer than a year or two to produce results, and the measurement of results needs to be built into the communications design, with goals identified and accepted by the Board (Note: should not be tied to number of “hits” on a website, number of “friends” on Facebook, number of “impressions” from media use, but rather concrete measures of goal achievement.)

Although the above is not all-encompassing, it is a good summary of the efforts that have been attempted in the past to increase awareness of The Able Trust and its work and mission. Based on the variety of efforts, decision point discussions should include:

- Audience
- Message
- Goals
- Outcomes measurement
- Acceptable ROI
- Funding/Resource dedication



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**PRESIDENT/CEO**

Jeanne F. Homant, MBA, DPA

July 29, 2014

Re: The Able Trust Code of Ethics

FS 20.058 requires submission of a number of documents and other information from The Able Trust (aka The Florida Endowment for Vocational Rehabilitation), as a DSO of DEO/DVR. One of the requirements is the submission of a Code of Ethics.

The Able Trust Code of Ethics is contained in its five primary governing documents or policies, as follows. A copy of each of the governing documents is attached.

1. Conflict of Interest Policy
2. Whistleblower Policy
3. Grant Policy
4. Compensation of Officers Policy
5. Document Retention & Destruction Policy

I am also including a copy of The Able Trust bylaws as the primary governing document of the foundation.

If requested, we can also submit a copy of our Employee Handbook, which contains other information related to the management of Able Trust staff. The primary ethics issues addressed in the Employee Handbook are also addressed in the Conflict of Interest Policy. All staff, Board members and Ambassadors are required to sign a copy of the Policy, and adhere to its requirements.



**The Able Trust**

## **Conflict of Interest Policy**

**Adopted by The Able Trust Board of Directors September 25, 2009**

**Policy Statement:** No officer, director, ambassador or employee of The Able Trust shall receive any non-work personal or financial benefits from their role at The Able Trust that may create a conflict of interest or be in conflict with the bylaws of The Able Trust. This policy is intended to supplement but not replace any applicable state or federal laws governing conflict of interest that are applicable to non-profit and charitable organizations.

**Purpose:** A possible conflict of interest could arise in any situation in which The Able Trust has business or financial dealings with an officer, director, ambassador, or employee, or with a corporation, partnership, or other business enterprise of which the above or their immediate family is an employee, officer, director, partner or substantial stockholder. A possible conflict of interest could also arise in connection with a decision to make a grant to, or otherwise support a nonprofit organization of which one of the above is an officer, director, trustee or relative of a client of the nonprofit organization.

A conflict of interest occurs when an officer, director, ambassador, or employee uses his/her position or the knowledge gained from association with The Able Trust in a way that is contrary to or inconsistent with the interest of The Able Trust, for personal benefit or advantage to the individual or the individual's immediate family.

At the same time, The Able Trust recognizes it is inherent in the process of the selection of the members of the Board of Directors, Ambassadors, and employees that they are and will continue to be, active in commercial and volunteer activities. Likewise, The Able Trust does not desire to deprive organizations or agencies, although they may be prospective grant recipients or otherwise supported organizations, from the benefits to be received from the expertise of the referenced individuals.

This document is intended to recognize that conflict of interest situations may arise, and identifies some key situations where that might occur. **Officers and Directors:** Each member of the Board of Directors, by written statement delivered annually to the President and CEO, discloses the corporations, partnerships, proprietorships, and other business enterprises of which the Director or member of the Director's immediate family is an officer, director, partner, or a substantial stockholder or owner and which have or might reasonably be expected to have business or financial dealings with The Able Trust.

- When any possible conflict of interest of any Director or Officer becomes relevant to any matter requiring action by the Board, that Director shall call it to the attention of the Board, shall not vote on such a matter, and shall not attempt to exert a personal influence in connection therewith. The disclosure shall be recorded in the minutes of the meeting. The Director shall not be present during the Board's final discussion or during vote on the issue.
- No officer or director of the Board shall knowingly take any action or make any statement intended to influence the conduct of The Able Trust in such a way as to confer any benefit to such member or to any organization that he/she has significant interest as stockholder, director, or officer.

- Any Director who is excluded from voting on a matter because of such possible conflict of interest is not excluded from disclosing relevant information with respect to any matter which he or she has knowledge of or answering questions and stating his/her position with respect to any such matter, if such statements and commentary will assist the Directors in their deliberations.
- These guidelines shall not be construed as preventing officers and directors of The Able Trust from entering into a beneficial business relationship, as long as the overriding criteria is to the benefit of The Able Trust, and provided that there is appropriate disclosure ~~ion~~ of any such agreement according to the procedures in this policy.

**Ambassadors:** Each Ambassador upon appointment by the Board, shall also deliver a written statement annually to the President and CEO, disclosing the corporations, partnerships, proprietorships, and other business enterprises of which the Ambassador or his/her immediate family has a substantial interest, or which has or might reasonably be expected to have business or financial dealings with The Able Trust.

**Employees:** Employee conflict of interest situations can arise in several areas, including acceptance of gifts, outside employment, personal financial interests, and outside activities, to name a few. The following, along with policies in the Employee Handbook should serve as a guide.

Outside Activities: Employees are encouraged to take an active role in educational, cultural, or civic activities. However, such active roles should not be so excessive that it impairs the effective performance and attendance of the employee at The Able Trust. Approval by the President and CEO or his/her designee is required before accepting any outside responsibility that is likely to:

- Involve the use of the employee's time during working hours.
- Involve association with a competing organization.
- Involve acting on behalf of The Able Trust to support any causes and issues which are not related to the mission of The Able Trust and have not been previously approved by the President & CEO.

Outside Employment: The Able Trust does not object to employees holding other jobs provided that there is no conflict of interest and that the position at The Able Trust is primary. Outside employment that interferes with the employee's obligations to The Able Trust is prohibited.

- Before accepting any supplementary position, it is required that the employee notify his/her immediate supervisor who shall notify the President and CEO. This is to determine if there is a conflict of interest or if it would adversely affect his/her job.
- If the position at The Able Trust should suffer due to the additional employment, The Able Trust reserves the right to request the employee resign from the supplemental employment.

Personal Financial Interest – employees: All employees are required to disclose all outside interests that may influence official decisions and actions. This would include:

- A situation where an employee or any member of his/her immediate family has a direct or indirect financial interest in an outside enterprise that has in the past engaged or may in the future engage in transactions as a vendor or supplier of goods and services to The Able Trust.
- A situation where an employee or any member of his/her immediate family has a direct or indirect financial interest in any outside business enterprise that "competes" in any way with The Able Trust.

Acceptance of Gifts: Employees and Directors acting in an official Able Trust capacity should avoid accepting gifts or favors for personal use or benefit which extend beyond accepted business practices for a non-profit foundation.

- Under no circumstances may a gift be accepted which may place the employee or Director under the influence or obligation to a third party in dealing with or representing the interests of The Able Trust.
- Employees and Directors may receive gifts of a nominal value defined as no greater than \$100, unless a greater amount has been approved by the President/CEO. Examples of greater amounts are complimentary conference registrations when asked to speak, related travel, etc.
- No employee or Board member may use his/her position to solicit any discount on personal or family purchases of equipment, materials, or services from present or prospective vendors of The Able Trust.

Family or members of the immediate family for the purposes of this policy are spouses, children, parents, brothers and sisters and any others living in the same household.

#### PROCEDURE IN DETERMINING CONFLICT OF INTEREST

Officers and Directors: The President and CEO should take appropriate steps to ensure that any business with officers and directors of the Board meet the overriding need of The Able Trust and not that of the members. However, when there appears to be a conflict of interest the Board of Directors shall take appropriate steps as follows.

- The Executive Committee shall examine all of the facts of the transaction/event and determine if it has been handled in a way that does not and will not create a conflict of interest. Concerns arise especially when significant verbal contracts are put in place or when contracts are awarded without considering a bid process, if feasible.
- If a better transaction/event for The Able Trust is not reasonably attainable under circumstances that would not create a conflict of interest, the Executive Committee shall determine, by a majority vote of disinterested members of the Committee whether the transaction/event is in The Able Trust's best interests, and whether the transaction/event is fair and reasonable to The Able Trust.

Employees: Issues of potential or actual conflict of interest activities or relationships on the part of employees shall be reported immediately and confidentially to the President and CEO. If the President and CEO is unable to resolve the matter internally, she/he will bring the matter to The Able Trust Executive Committee, which shall proceed as above in resolving the matter.

OFFICIAL REPRESENTATION OF THE ABLE TRUST: For purposes of this document and other policies and procedures related to the ethical and legal operations of The Able Trust, the following individuals are recognized as the official representatives of The Able Trust, authorized to make public commentary and communicate as official spokespersons of The Able Trust on policy, legal, and other matters related to the governance and operations of The Able Trust.

Chairperson of the Board  
 President and CEO  
 Chair, Marketing and Development Committee  
 Additional individuals at the discretion and direction of the Chair or President/CEO.

Other Directors and Staff are not prohibited from widely delivering messages that have been established through the efforts of the organization's communication staff and consultants, nor are they in any way prevented from promoting the programs, services and mission of The Able Trust. However, all inquiries related to official statements, all media requests, and similar communications should be referred to the President or Chair for spokesperson designation.

**ACKNOWLEDGEMENT:**

Each officer, director and employee shall sign a statement affirming that he/she:

- Has received a copy of the Conflict of Interest Statement;
- Has read and understands the policy;
- Has agreed to comply with the policy;
- Understands that The Able Trust is a charitable foundation and in order to maintain its federal tax exemption, must engage primarily in activities that accomplish one or more of its tax exempt purposes.

Statements of acknowledgement of officers, directors and employees shall be kept in appropriate files in the office of the President and CEO.

Approved by Able Trust Board of Directors on September 25, 2009.

Revised by the Board of Directors, June 15, 2012

Accepted: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_



## Whistleblower Policy and Procedures Approved by Board of Directors 9-25-2009

### General

The Able Trust (Trust) is committed to lawful and ethical behavior in all of its activities and requires officers, directors, volunteers, employees to act in accordance with all applicable laws, regulations and policies and to observe high standards of business and personal ethics in the conduct of their duties and responsibilities.

The objectives of the Trust's Whistleblower Policy are to establish policies and procedures to:

- prevent or detect and correct improper activities;
- encourage each Trust director, officer, employee and volunteer to report what he or she in good faith believes to be a material violation of law or policy or questionable accounting or auditing matter by the Trust;
- ensure the receipt, documentation, retention of records, and resolution of reports received under this policy;
- protect Reporting Individuals from retaliatory action.

### Reporting Responsibility

Each Reporting Individual has an obligation to report what he or she believes is a material violation of law or policy or any questionable accounting or auditing matter by the Trust, its officers, directors, employees, volunteers, agents or other representatives. Reporters must also notify the Trust if an action needs to be taken in order for the Trust to be in compliance with law or policy or with generally accepted accounting practices. The types of concerns that should be reported include, for purposes of illustration and without being limited to, the following:

- providing false or misleading information on the Trust's financial documents, grant reports, tax returns or other public documents;
- providing false information to or withholding material information from the Trust's auditors, accountants, lawyers, directors or other representatives responsible for ensuring Trust compliance with fiscal and legal responsibilities;
- embezzlement, private benefit, or misappropriation of funds;
- material violation of Trust policy, including among others, confidentiality, conflict of interest, whistleblower, ethics and document retention;
- discrimination based on race, gender, sexual orientation, ethnicity, and disability;
- facilitation or concealing any of the above or similar actions.

## Reporting Concerns

### Employees

Whenever possible, employees should seek to resolve concerns by reporting issues directly to his/her manager or to the next level of management as needed until matters are satisfactorily resolved. However, if for any reason an employee is not comfortable speaking to a manager or does not believe the issue is being properly addressed, the employee may contact the President and CEO. If an employee does not believe that these channels of communication can or should be used to express his/her concerns, an employee may contact the Chair of the Trust's Board of Directors. Whenever practical, reports should be in writing.

### Directors and Other Volunteers

Directors and other volunteers may submit concerns to the President and CEO or directly to the Chair of the Board of Directors. If the volunteer or director is not comfortable reporting to either of these individuals or if he/she does not believe the issue is being properly addressed, the volunteer or director may report directly to the board chair.

[Contact information](#) for the President/CEO and board chair may be obtained from the Trust's website ([www.abletrust.org](http://www.abletrust.org)) by calling the Trust at 850-224-4493. Concerns may be submitted anonymously. Because it is impossible to seek additional information from a Reporting Individual about anonymous reports, it is essential that such reports contain as much specific information as possible.

### Handling of Reported Violations

The Trust will investigate all reports filed in accordance with this policy with due care and promptness. Matters reported internally without initial resolution will be investigated by the President and CEO of the Trust to determine if the allegations are true, whether the issue is material and what actions, if any, are necessary to correct the problem. Trust staff will issue a full report of all matters raised under this policy to the Chair of the Board of Directors (Chair). The Chair may conduct a further investigation upon receiving the report from the President and CEO.

For matters reported directly to the Chair, the Chair shall promptly (generally within five business days) acknowledge receipt of the complaint to the complainant if the identity of the complainant is known and conduct an investigation to determine if the allegations are true and whether the issue is material and what, if any, corrective action is necessary. Upon the conclusion of this investigation, the Chair shall promptly report its findings to the Executive Committee.

### Authority of the Executive Committee

The Executive Committee, under the direction of the Chair, shall have full authority to investigate concerns raised in accordance with this policy and may retain outside legal counsel, accountants, private investigators, or any other resource that the Chair and Executive Committee reasonably believes is necessary to conduct a full and complete investigation of the allegations.



## No Retaliation

This Whistleblower Policy is intended to encourage and enable directors, volunteers, and employees to raise serious concerns within the organization for investigation and appropriate action. With this goal in mind, no director, volunteer, or employee who, in good faith, reports a Concern shall be threatened, discriminated against or otherwise subject to retaliation or, in the case of an employee, adverse employment consequences as a result of such report. Moreover, a volunteer or employee who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of employment.

## Acting in Good Faith

Anyone reporting a Concern must act in good faith and have reasonable grounds for believing the matter raised is a serious violation of law or policy or a material accounting or auditing matter. The act of making allegations that prove to be unsubstantiated, and that prove to have been made maliciously, recklessly, with gross negligence, or with the foreknowledge that the allegations are false, will be viewed as a serious disciplinary offense and may result in discipline, up to and including dismissal from the volunteer position or termination of employment. Depending on the circumstances, such conduct may also give rise to other actions, including civil or criminal lawsuits.

## Confidentiality

Reports of Concerns, and investigations pertaining thereto, shall be kept confidential to the extent possible. However, consistent with the need to conduct an adequate investigation, the Trust cannot guarantee complete confidentiality. Disclosure of information relating to an investigation under this policy by Trust staff, directors, or others involved with the investigation of Concerns to individuals not involved in the investigation will be viewed as a serious disciplinary offense and, with respect to Trust employees, may result in discipline, up to and including termination of employment. Depending on the circumstances, such conduct may also give rise to other actions, including civil or criminal lawsuits.

Adopted by The Able Trust Board of Directors: September 25, 2009



Adopted by the Board of Directors March 8, 2013

## Grant Policy

### Eligibility

- A. **Applicants:** The Able Trust (Foundation) will accept for review complete proposals and supplemental materials from organizations that are either governmental agencies or are currently qualified as tax exempt under Internal Revenue Code Section 501(c)(3) and demonstrate an interest to serve the employment needs of individuals with disabilities in the state of Florida.
- B. **Types of Grants:** The Foundation makes the following types of Grants:
1. **Strategic Employment Placement Initiatives** –this is the primary grant program of The Foundation and such proposals address the employment placement of Floridians with disabilities. Consideration for these large grants will occur at the 3rd Quarter Board Meeting of The Foundation. Awards in this category range up to \$250,000 and cover a two or three year grant period.
  2. **Board Directed Initiative Grants** – This program is defined thru an announcement by the Board of Directors for proposals that address a specific issue. The release of an Initiative Request is at the discretion of the Board and may occur at any time during a fiscal year. Funding parameters in this category will be described in the published Initiative Request and will correspond to the described objective of the Board Directed Initiative.
  3. **General Support for Employment Placement Programs** - this program is for general support of employment programs for a grant year. Requests should result in employment placement for participating individuals with disabilities and could encompass equipment and/or staffing needs of an applicant organization to expand an existing program in a new way or create a new program. Awards for this category will occur twice a year at the Fall and Summer Board Meetings. Awards in this category range up to \$65,000 for a one year grant period.
  4. **Supplemental Grants** – the Foundation Board may at its discretion add funds to existing grants.

### C. Proposal Evaluation and Limitations

1. Proposals must address the successful employment placement of Floridians with disabilities. Successful employment is defined as an individual, entering or retaining full time, or if appropriate, part time competitive employment in the integrated labor market at minimum wage or above for at least a year. This may include supported or transitional employment in an integrated setting consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities' and interests. Applicants are responsible for following up with individuals placed to capture their employment data for up to three years in a follow up study period. See additional information below in number 11.
2. Only one proposal at a time from an organization will be considered.
3. Proposals must include a detailed "Project Plan and Description" on how employment will be secured for individuals from a defined community and/or disability population group.

4. Proposals must present a thoughtful and realistic "Plan for Future Funding" that addresses the sustainability of the proposed program and project objectives when the grant period is complete.
5. Where possible, proposals should demonstrate an identified gap between services the Agency has funding for and what the community's needs are.
6. Proposals must present a line item budget to implement the program goals under consideration. Administration cost is limited to 15% of the total program costs demonstrated on the line item budget.
7. In the review process, the geography served by the program is taken into consideration as The Foundation is responsive to all 67 counties in Florida.
8. In the review process, the disability populations proposed to be served are taken into consideration as The Foundation strives to serve diverse populations of disabilities in any given grant period.
9. Pre-Award site visits may be required for any or all grant awards.
10. Proposals should outline how employment outcomes will be measured up to three years after the grant period has ended. Outcome measures will be required and may be requested by the President/CEO, Senior Vice President or their authorized designee. Outcome measures will be stated in contract language on a case by case grant basis, as a condition of award.
11. Applicants must be able to provide contact information for all individuals who are placed in employment. The contact information should include at a minimum, the full name of the individual, address, phone, email, position info & job title, pay scale at placement, business name, supervisor's name & title, and signed waiver allowing for follow-up research by The Foundation.
12. Proposals with multiple sources of funding are encouraged.
13. In the interest of transparency, a grant applicant should disclose any known relationship, donation of funds and/or volunteer hours with (a) a Director of The Foundation and the staff/co-worker of that Director at their place of business and (b) staff of The Foundation and/or their immediate family.

- D. Length of Grant:** The Foundation will consider grants of one, two or three year time length. Multi-year grants will only be considered from eligible agency applicants and subsequent year funding will depend on the success of the first year and availability of funds. Multi-year grants awards will be structured and outlined in the Grant Award contract at the discretion of the Foundation.
- E. Non-Discrimination:** There are no restrictions on the granting or use of the grants with respect to abilities, race, color, creed, sex, sexual orientation or religion. All awarded organizations are expected to maintain ADA accessible environments and positively promote the hiring of individuals with disabilities.
- F. Exclusions:** The Foundation will not consider for funding any proposal outside the description provided above "Applicant" (A). For additional clarification, The Foundation will not consider:
1. Proposals from individuals,
  2. Proposals that do not demonstrate other funders or plans to gain other funders for support,
  3. Proposals that deliver services outside the state of Florida,
  4. Proposals that include medical treatment, prescriptions or therapy,
  5. Proposals which include requests for fellowships, scholarships or travel grants,
  6. Proposals that include a request for the purchase of real estate or for building improvements,
  7. Proposals that do not address employment placement for persons with disabilities in Florida.

### **G. Application Process:**

1. Deadlines for Application
  - i. For **Strategic Employment Placement Initiatives** for consideration in the 3rd Quarter Board Meeting a complete proposal must be submitted by September 5<sup>th</sup>.
  - ii. For **Requests for Proposals** the deadlines will be announced in the published announcement.
  - iii. For **General Support for Employment Placement Programs** a complete proposal must be submitted by April 5<sup>th</sup> for consideration at the 4th Quarter Board Meeting and by July 5<sup>th</sup> for consideration at the 1st Quarter Board Meeting.
2. The Grant Committee recommends and the Board of Directors approves proposals for funding twice a year at the 1st Quarter and 4th Quarter Board Meetings of The Foundation. The 3rd Quarter Strategic Employment Placement Initiatives are presented directly to the Board at the scheduled meeting.
3. All decisions of the Board of Directors are final.
4. Required Supplemental Materials are:
  - i. Copy of IRS 501(c)(3) Designation
  - ii. Copy of most recent Financial Audit or Financial Statements
  - iii. Copy of most recent Annual Report. If Agency does not produce an official Agency Report then a one page summary of services provided in the previous year will suffice.
  - iv. Copy of the most recent Internal Revenue Service 990 filing.
  - v. Copy of state of Florida Charitable Solicitation Registration
  - vi. Contact list of current Board of Director Members (Addresses & Phone Numbers)
  - vii. A completed ADA Verification form.
  - viii. Two Letters of Support about the project under consideration.

### **H. Grant Proposal Review Process:**

1. Pre-Award site visits may be required for any and all grant awards at staff discretion. However multi-year grants will always require a pre-award site visit conducted by a staff member as assigned by the President/CEO.
  - i. Less than/equal to \$100,00: up to two staff representatives
  - ii. \$100,000-\$200,000: up to two staff or Board representatives
  - iii. Over \$200,000: up to two staff, one to two Board Members or designated Ambassadors with the possibility of an outside "expert" selected by The Foundation.
2. Proposals will be reviewed by an Internal Staff Committee consisting of the President/CEO two additional staff members selected by the President/CEO. This Internal Committee will select proposals that will comprise the Agenda of The Foundation Board of Director's 1st Quarter and 4th Quarter Grant Committee.
3. The Foundation Grant Committee A will review the 1st Quarter General Support for Employment Placement Programs proposals and The Foundation Grant Committee B will review the 4th Quarter General Support for Employment Placement Programs proposals for possible recommendations to the Board of Directors. The Strategic Employment Placement Initiatives will be reviewed and selected by the Foundation Board of Directors.

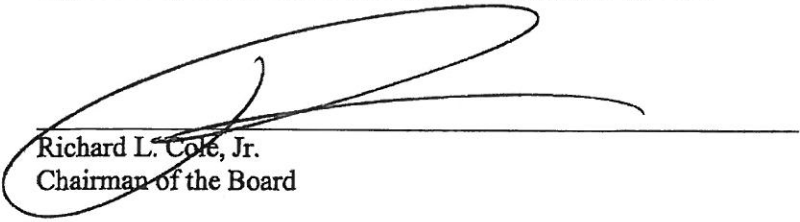
4. Able Trust Ambassadors are eligible to be appointed to a Grant Committee at the Board Chair's direction for the review and discussion of applicants in an advisory capacity, including the Strategic Employment Placement Initiatives. Ambassadors cannot cast a vote on the proposal but may participate freely in the discussion and/or pre-award site visit if assigned.

**I. Grant Award Administration and Monitoring**

1. Distribution of funds: The Grant awards can be paid in full or partial amounts as decided by the Board of Directors at its sole discretion. However the Grant Award Contract will indicate the method and amount(s) of disbursements. Annual Grants in excess of \$10,000 will be paid in at least two payments, the second payment being dependent upon submission and approval of the Project's Initial and/or Interim Progress Report. Any funds needed for the start up of a project shall be included in the first disbursement.
2. All grant recipients shall complete at least two progress reports during each grant year by the due date. Recipients may elect to receive their reporting materials either by the postal mail or electronically.
3. Follow-up site visits after a grant award shall be conducted at a minimum of twenty-five percent of all grant award sites. Site visits for multi-year grant applicants shall be completed before the consideration and review of Year Two or Year Three funding. Site visits can be conducted at any time.
4. Compliance Audits may be conducted on any grant funded project that the President/CEO or The Foundation Board of Directors deems necessary.

This document constitutes the Grant Making policies and procedures of The Able Trust which are subject to periodic review and modification by its Board of Directors.

Approved by Able Trust Board of Directors March 8, 2013.



Richard L. Cole, Jr.  
Chairman of the Board



## **The Able Trust**

### **File Retention and Destruction Policy**

**Adopted by Board of Directors 9-25-2009**

General Policy: The Able Trust retains records and files as required by law or prudent business practice, and destroys them when appropriate. It is against policy for any employee to knowingly alter, destroy, mutilate, conceal, cover up, falsify, or make false entries in any record or document with the intent to obstruct or influence the proper administration or investigation of any matter within the jurisdiction of any law enforcement agency of federal, state and local government.

The Able Trust is a non-profit organization partially supported by public dollars, thus any policy established to provide direction on the retention and destruction of corporate records must comply, at minimum, with any local, state and federal regulations and laws that are applicable to a 501(c)(3) organization. There are established state and federal requirements regarding the retention of records. The State of Florida Archives recommends the following guidelines.

- Grant files must be retained for five years.
- Selected Finance files must be retained for seven years, with a recommendation they be retained for ten years.
- High School/High Tech files must be retained five years after state audit or such other periods of time as shall be required by any contract with the State of Florida.

In addition, The Able Trust will retain files for the following categories of corporate materials.

- Personnel files shall be retained for five years.
- Contract files shall be retained for five years after the conclusion of the contract.
- Program files shall be retained for five years
- Endowment financial records shall be retained for seven years.
- Minutes of the meetings of The Board of Directors shall be retained until the organization shall be dissolved.

The Able Trust shall retain its records either on premises at The Able Trust offices in Tallahassee; within a secure, permanent and available offsite electronic setting that is technologically supported; in a lending institution safety deposit box; or with the State of Florida Archives. The location of The Able Trust as of January 1, 2009 is 3320 Thomasville Road, Tallahassee, Florida. The State Archives storage facility is located in Tallahassee, Florida. Senior Staff are responsible to preserve and protect all of the records and files of their designated divisions/departments as follows:

1. Determine the proper retention period for records according to applicable laws and regulatory agencies.

2. Ensure that current records are maintained in the central file room of The Able Trust to the greatest extent possible. Records maintained in other areas of the office or at the state archives must be done at the approval of the President/CEO, with the President/CEO having access to such records at all times. Staff is not permitted to maintain any records in other areas, or outside the office. Non-current records may be maintained at the State Archives, with records of such files so stored recorded in a designated file by staff, as records may be ~~are~~ moved to the Archives from time to time. The Archive file record shall be maintained in the office of the President/CEO or other location known and accessible to the President/CEO.
3. A form shall be created for the purpose of records storage and disposal, and shall be maintained in the designated file at The Able Trust office.

Procedure for potential litigation:

In the event any employee/consultant of The Able Trust receives notice regarding potential litigation, investigation or audit, this employee is obligated to immediately report the requested information to the President/CEO. Immediate action should be taken to notify all affected persons within the company not to dispose of any records until the President/CEO and if appropriate legal or professional counsel determines what records (including electronic records) are involved and the appropriate course of action.

Electronic records are maintained by The Able Trust's electronic services provider, and no employee shall authorize the disposal of any electronic records that are maintained by such provider.

Approved by the Board of Directors: September 25, 2009

Updated by the Board of Directors: June 15, 2012



## **The Able Trust**

### **Compensation Policy: Officers and Directors**

#### **Adopted by Board of Directors 6-15-2012**

The Able Trust is a non-profit organization governed by a volunteer Board of Directors. According to the bylaws of the organization, the Directors are not entitled to compensation for services. This policy document is thus limited to the compensation of the President and CEO.

The Executive Committee (Committee) of the Board of Directors is appointed by the Board to discharge the Board's responsibilities relating to compensation of the organization's President and CEO. The Executive Committee has the overall responsibility for approving and evaluating all compensation plans, policies and programs of the Company as they affect the President and CEO. Compensation plans and policies for other staff of the organization are considered operational decisions and under the authority of the President and CEO.

The purpose of the policy is to ensure that the compensation guidelines for the chief executive are fair in regard to job responsibility, job performance, and organization performance. Also to ensure that compensation is comparable to jobs in similar organizations, based on available data, and to equally assure that compensation can be properly justified and explained to the public by the Board of Directors.

#### **Authority and Responsibilities**

1. The Committee shall annually review and approve the base salary and annual incentive opportunities of the President and CEO (CEO). Periodically and as appropriate, the Committee shall review and approve all other incentive opportunities, employment agreements and severance arrangements, both cash-based and other awards.
2. The Committee shall annually review and approve corporate goals and objectives relevant to CEO compensation, review and approve personal goals as assigned, evaluate the CEO's performance in light of those goals and objectives, and award a compensation level based on this evaluation. In evaluating the incentive components of the CEO compensation, the Committee shall consider the organization's performance, the CEO's achievement of personal goals, the value of similar incentive awards to CEOs at comparable organizations, and the awards provided to the CEO in past years.
3. The Committee shall have the sole authority to retain and terminate any compensation consultants to be used to assist it in the evaluation of the CEO, as well as the authority to obtain advice and assistance from legal, accounting, or other advisors.
4. The Committee shall assure the organization's compliance with federal and state laws relating to the compensation package of the CEO, with particular attention to 401(k) plans, loans to the CEO, and compliance with other benefit regulations.
5. The Committee shall document all compensation decisions and make regular reports to the Board of Directors.



**The Able Trust**

**Florida Endowment Foundation for Vocational Rehabilitation, Inc.**

**BY-LAWS**

**Amended June 15, 2012**  
**Amended March 4, 2011**  
**Amended June 11, 2010**  
**Amended June 12, 2009**  
**Amended June 28, 2008**  
**Amended September 13, 2003**  
**Amended October 2, 1999**  
**Amended September 20, 1997**  
**Amended September 29, 1996**  
**Amended March 19, 1995**  
**Adopted February 21, 1991**

**Article One-Organization**

- 1. Name.** The name of the organization shall be the Florida Endowment Foundation For Vocational Rehabilitation, Inc. The organization shall also operate under the name of The Able Trust.
- 2. Corporate Seal.** The organization shall have a corporate seal indicating the name of the organization and the date founded (1991).
- 3. Fiscal Year.** The fiscal year of the corporation shall commence on the first day of July and end on the thirtieth day of June.
- 4. Operations.** The Board of Directors shall approve an annual budget, formulate policies and procedures, select recipients for grants funding, design and approve special programs and projects, hire a chief executive officer to manage daily business operations and otherwise serve to fulfill the mission of the Foundation. The chief executive officer shall be one of the individuals authorized to sign checks, drafts and contracts on behalf of the organization, provided those checks, drafts, and contracts are within the established budget for the fiscal year.

**Article Two - Mission**

- 1. Mission Statement.** To be a key leader in providing Floridians with disabilities opportunities for successful employment.

### **Article Three – Purpose**

**1. Purpose.** The Board of Directors shall adhere to the purposes of enabling legislation 413.615 in setting forth policies and objectives in pursuant of its mission. The Foundation operates within a contract signed by the Director, Division of Vocational Rehabilitation and the Foundation Chair, and within rules promulgated specifically for the Foundation, which are approved by both entities.

**2. Grantmaking Policies.** The Board of Directors shall set policies on grantmaking. To amend or change grantmaking policies, proposed amendments or changes in policies must be submitted to the to the Board of Directors at least thirty (30) days prior to a scheduled meeting at which the proposed amendments or policies are to be approved. A majority vote of the Board of Directors is required to amend or change grantmaking policies.

### **Article Four - Board of Directors**

**1. Vacancies.** In any event of a vacancy of the Board caused by other than the expiration of a term the Chair may request that the Governor appoint a new member to fulfill the term.

**2. Performance of Duties.** Each Board member is accountable to the Governor for the proper performance of the duties of the office as set forth in Florida Statute 413.615.

**3. Removable for Cause.** The Governor may remove any Board member from office for malfeasance, misfeasance, neglect of duty, incompetence, or permanent inability to perform official duties or for pleading nolo contendere to, or being found guilty, of a crime.

**4. Statement of Ethics.** The Board of Directors shall adopt a statement of ethics to guide the Directors with regard to acceptance of charitable gifts, conflict of interest and other matters. Ethical issues are addressed in the organization's adopted Conflict of Interest Policy, which shall be maintained and reviewed by the Board on a regular basis, with any future changes accepted as a part of these Bylaws.

**5. Compensation.** No Director or Officer shall be compensated monetarily or in any form for serving on the Board of Directors except that reasonable expenses incurred on behalf of the organization shall be reimbursed upon submission of proper documentation.

### **Article Five – Officers and Executive Committee**

**1. Composition.** The Board of Directors shall consist of nine Directors appointed by the Governor of Florida as set forth in Statue 413.615. No Division of Vocational Rehabilitation, Florida Department of Labor and Employment Security employee, contractor or consultant nor any employee, contractor or consultant of The Able Trust nor any relative of The Able Trust staff or Board, may serve as a Director.

**2. Executive Officers and Committee.** The Officers of the organization shall be: Chair, Vice Chair, Secretary and Treasurer. The Executive Committee shall consist of the Chair, Vice Chair, Secretary and Treasurer. The Executive Committee shall act upon organizational business

between regular or special Board meetings and shall elect a Director- to fulfill the unexpired term of any officer.

## **Article Six - Duties of Officers**

### **I. Chair of the Board of Directors.** The Chair shall perform the following duties:

- A.** Chair and preside at all regular and special meetings and shall report on activities of the Foundation.
- B.** Appoint standing committee appointments, temporary or permanent and *ad hoc* committee appointments.
- C.** Serve as *ex officio* member of all committees except the Nominating Committee.
- D.** Shall be one of the officers authorized to sign checks, drafts and contracts on behalf of the organization.

### **2. Vice Chair.** The Vice Chair shall perform the following duties:

- A.** Chair and preside at meetings in the event of the absence or inability of the Chair to be present for such meetings, with all the rights, privileges and powers as the duly elected Chair of the Board.
- B.** Becomes Acting Chair in the event of the resignation, demise or inability of the elected Chair to exercise the duties of his/her office until a new Chair is elected.
- C.** Shall be one of the officers authorized to sign checks, drafts and contracts on behalf of the organization.

### **3. Treasurer.** The Treasurer shall perform the following duties:

- A.** Has care and custody of all monies belonging to the organization and is responsible for such monies or securities of the organization.
- B.** Ensures that regular and timely deposits are made in operating accounts of the organization and that invoices and bills are paid in a timely manner.
- C.** Ensures that all Directors and staff are bonded.
- D.** Serves as the Chair of the Finance Committee.
- E.** Renders written reports of the finances of the organizations to the Board of Directors at regularly scheduled Board meetings or as requested by the Chair, such report shall be physically affixed to the minutes of such meetings.
- F.** Recommends to the Board of Directors an auditor to perform an annual audit; the Board Directors may utilize its discretion in the selection of an auditor.

**G.** Shall be one of the officers authorized to sign checks, drafts and contracts on behalf of the organization.

**H.** The Treasurer shall exercise all duties incident to the office of Treasurer.

**I.** No special fund may be set aside that shall make it unnecessary for the Treasurer to sign checks issued upon it.

**4. Secretary.** The Secretary shall perform the following duties.

**A.** Records the minutes of all meetings.

**B.** Ensures that all books, reports, documents and certificates as required by law are properly filed, maintained or secured, including the annual report submitted to the Governor as required by legislation.

**C.** Maintains the corporate seal and records of the organization, serving as official custodian.

**D.** Gives and serves all notices to Directors and members of the organization.

**E.** May be one of the officers authorized to sign checks, drafts and contracts of the organization.

**F.** Attends to correspondence of the organization and exercises all duties incident to the office as Secretary.

### **Article Seven – Elections**

**1. Election of Officers.** Officers shall be elected every two years in even-numbered years at the annual meeting of the Board of Directors.

**2. Terms of Office.** The term of office for each Officer shall be two (2) years and shall begin on the first day of the next fiscal year, beginning with the 2012 annual meeting. No Officer shall serve more than three (3) consecutive terms in the same office. Officers are eligible to serve for office again pursuant to other terms of office included herein.

### **Article Eight – Meetings**

**1. Board Meetings.** The Board of Directors shall meet at least twice each year. All decisions shall be by majority vote, except amendments to the by-laws, which require a two-thirds majority vote, as provided in Article 13. 1.

**2. Executive Committee Meetings.** The Chair may schedule Executive Committee meetings or teleconference meetings at any time with a minimum of three (3) business days notice.

**3. Special Board Meetings.** Special meetings of the Board of Directors may be called by the Chair or upon request of a majority of the Board of Directors, providing a minimum of fifteen (15) days written notice prior to the meeting is given. The notice of the meeting must include

the purpose for which the meeting is called and the meeting must be dedicated only to the special purpose for which the meeting is called, unless by unanimous vote, other issues are included on the agenda.

**4. Teleconference Meetings.** The Chair may elect to conduct or may conduct upon request of a majority of the Board of Directors, teleconference special or Executive Committee meetings for the purpose of voting upon or discussing emergency issues. In cases of teleconference meetings, with a minimum of fifteen (15) days notice. Voting and communications may be facsimiled, verbal or written. Decisions are made by majority vote as provided in Articles 11.4, 14.1 and 15.1. Teleconference meetings do not supplant the requirement of Article 9.1 to have a minimum of two regular meetings each year.

**5. Quorum.** A quorum shall consist of a majority of Directors. That majority shall be present by phone or in person.

**6. Notice of Meetings.** The Chair shall ensure that all Directors are notified of regular meetings at least sixty (60) days in advance of the scheduled regular meeting and at least fifteen (15) days in advance of a special meeting and shall ensure that appropriate materials are distributed at least ten (10) days in advance of any meeting.

**7. Absences.** Each Director is expected to attend regular and special meetings. Directors should inform the President, Chair or Secretary if they will be unable to attend meetings.

#### **Article Nine - Indemnification of Directors, Officers and Employees**

**1.** The Foundation shall indemnify each person who is a Director or Officer against all liability and reasonable expense that may be incurred in connection with or resulting from any claim, action, suit or proceeding (whether actual or threatened, and whether civil, criminal, administrative, investigative, or in connection with an appeal relating thereof) in which such person may be involved by reason of having been a Director or Officer of the Foundation. Such persons may be indemnified for any past or future act or omission of such person in the person's capacity as a Director or Officer, if such person acted in good faith,

**A.** In the case of conduct in such person's official capacity, that his/her conduct was in the best interest of the Foundation, as the case may be.

**B.** In all other cases, that his/her conduct was at least not opposed to the Foundation's best interests; in any criminal action or proceeding, such person must have no reasonable cause to believe that his/her conduct was unlawful.

**2.** The Foundation indemnifies any person who is or was an employee or agent of the Foundation to the same extent as provided for Directors and Officers.

**3.** Outside legal counsel may be engaged by the Foundation (who may be regular counsel of the Foundation) to deliver a written opinion that the conduct of such person's met the Foundation's Policy (or Statement) of Ethics and otherwise meets the indemnification criteria,

**4.** The term "liability" shall mean an obligation to pay in settlement or in satisfaction of claims, judgments, fines or penalties and, with respect to employee benefit plans, excise taxes and the

term "expenses" shall include, but is not limited to, attorney's fees and disbursements incurred in connection with the claim, action, suit or proceeding.

5. Notwithstanding any other provisions of this Article, there shall be no indemnification.

### **Article Ten - Advisory Board**

**1. Composition.** The Able Trust may have one or more advisory boards, the number, composition and responsibilities of which may change from time to time.

**2. Duties of Advisory Board.** Members of any advisory board are appointed to contribute expertise, wisdom and knowledge to assist the Foundation in its mission or to serve in an honorary capacity. Advisory board Members may have experience in vocational rehabilitation, finance, management, policymaking, public relations, business or other areas.

Advisory board Members are invited to attend all regular meetings of the Board of Directors and may serve on standing or ad hoc committees as appointed by the Chair. Advisory board Members have no vote and are ineligible for election as Officers.

**3. Terms of Office.** Members of any advisory board shall serve for a one (1) year term and can be re-appointed.

**4. Appointments.** Members of the advisory board shall be approved by majority vote of the Board of Directors. Resumes for nominees recommended by the Executive Committee as potential Advisory Board Members shall be distributed to the Board of Directors not less than fifteen (15) days prior to the meeting scheduled to approve appointments.

### **Article Eleven – Committees**

**1. Standing Committees.** The Chair shall appoint the following standing committees and may appoint ad hoc committees as necessary. The Chair is ex officio member of all committees except the Nominating Committee.

**A. Development and Marketing Committee.** Reviews and advises on fundraising, endowment, public relations and promotional activities and makes recommendations to the Board of Directors.

**B. Finance and Endowment Committee.** Regularly reviews organizational finances and endowment funds and makes recommendations to the Board of Directors. The Treasurer shall be the chair of this Committee.

**B. Grant Review Committees.** Review grant applications and make recommendations for grant awards based upon criteria developed by the Board of Directors.

**C. Legislative Committee.** Monitors state and federal legislation and policies and makes recommendations to the Board of Directors on potential and actual legislation that may affect the Foundation, its mission, policies or operating procedures.

**2. Elected Committees.** The following Committees are elected by majority vote.

**A. Nominating Committee.** During election years, The Board of Directors shall elect a Nominating Committee consisting of three Directors at the Board meeting held during the third quarter of its fiscal year. The Nominating Committee shall elect a Chair of the Committee and shall present a slate of Officers to the Board of Directors at least thirty (30) days prior to a scheduled election meeting. At the meeting to elect officers, additional nominations may be made from the floor.

**B. Ethics, Bylaws and Policies Committee:** At each election the Board of Directors shall elect three Directors and one alternate to serve on the Ethics, Bylaws and Policies Committee, which shall address ethical, conflict of interest questions and issues, amendments to the Bylaws, and issues related to governance policies. The Committee shall make recommendations to the Board of Directors.

### **Article Twelve – Amendments**

**1.** These by-laws may be altered, amended, repealed or added to by an affirmative vote of not less than two-thirds of the Board of Directors. The Ethics, By-laws and Policies Committee shall submit proposed amendments to the Board of Directors not less than thirty (30) days prior to a meeting scheduled for vote on amendments or changes to the by-laws.

### **Article Thirteen – Dissolution**

**1.** Dissolution of the Florida Endowment Foundation for Vocational Rehabilitation shall be determined by a three-fourths vote of the Board of Directors.

**2.** Upon dissolution of the, Foundation, the Board of Directors shall, after paying or making provision for the payment of all liabilities of the organization, dispose of the assets of the organization to a similar organization(s) organized and operated exclusively for the advancement of persons with disabilities or education for persons with disabilities under Section 501 (c)(3) of the Internal Revenue Service Code of 1954 (or the corresponding provision of any future United States Internal Revenue Service law) as the Board of Directors shall determine.

### **Article Fourteen - Governing Authority**

**1.** Robert’s Rules of Order (Newly Revised) shall be the parliamentary authority of the Florida Endowment Foundation for Vocational Rehabilitation, subject to these by-laws and to such rules as may be adopted by the Board of Directors.

# Return of Organization Exempt From Income Tax

**2012**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements.

**A** For the 2012 calendar year, or tax year beginning 07/01, 2012, and ending 06/30, 2013

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Terminated  
 Amended return  
 Application pending

**C** Name of organization THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.  
 Doing Business As \_\_\_\_\_  
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
3320 THOMASVILLE ROAD 200  
 City, town or post office, state, and ZIP code  
TALLAHASSEE, FL 32308-7906

**D** Employer identification number  
59-3052307

**E** Telephone number  
(850) 224-4493

**F** Name and address of principal officer: SUSANNE HOMANT  
3320 THOMASVILLE ROAD TALLAHASSEE, FL 32308

**G** Gross receipts \$ 10,482,255.

**H(a)** Is this a group return for affiliates?  Yes  No  
**H(b)** Are all affiliates included?  Yes  No  
 If "No," attach a list. (see instructions)

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: WWW.ABLETRUST.ORG

**K** Form of organization:  Corporation  Trust  Association  Other

**L** Year of formation: 1991 **M** State of legal domicile: \_\_\_\_\_

**H(c)** Group exemption number

Part I Summary		Prior Year	Current Year
Activities & Governance	1 Briefly describe the organization's mission or most significant activities: <u>SEE SCHEDULE O</u>		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	8
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	8
	5 Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	13
	6 Total number of volunteers (estimate if necessary)	6	8
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0
b Net unrelated business taxable income from Form 990-T, line 34	7b	0	
Revenue	8 Contributions and grants (Part VIII, line 1h)	3,944,604.	1,958,201.
	9 Program service revenue (Part VIII, line 2g)	90,720.	91,950.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	593,844.	1,001,567.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	8,293.	76,986.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	4,637,461.	3,128,704.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	1,284,928.	1,428,027.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	797,944.	820,150.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b Total fundraising expenses (Part IX, column (D), line 25)	274,909.	
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	672,878.	685,061.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	2,755,750.	2,933,238.	
19 Revenue less expenses. Subtract line 18 from line 12	1,881,711.	195,466.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 27,308,517.	End of Year 28,682,266.
	21 Total liabilities (Part X, line 26)	3,579,687.	3,797,281.
	22 Net assets or fund balances. Subtract line 21 from line 20.	23,728,830.	24,884,985.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**  
 Signature of officer: Susanne F. Homant Date: 1/9/14  
 Type or print name and title: SUSANNE HOMANT PRESIDENT

**Paid Preparer Use Only**  
 Print/Type preparer's name: DEBORAH LEONARD Preparer's signature: Deborah Leonard Date: 1/09/2014 Check  if self-employed PTIN: P00218358  
 Firm's name: THOMAS HOWELL FERGUSON P.A. Firm's EIN: 59-3186310  
 Firm's address: 2615 CENTENNIAL BLVD., SUITE 200 TALLAHASSEE, FL 32308 Phone no.: 850-668-8100

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No



Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III [X]

1 Briefly describe the organization's mission: ATTACHMENT 1

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 2,486,291. including grants of \$ 1,428,027. ) (Revenue \$ 315,160. ) THE ORGANIZATION ASSISTS FLORIDIANS WITH DISABILITIES IN ACHIEVING EMPLOYMENT AND PROVIDES GRANTS TO SUPPORT VOCATIONAL REHABILITATION PROGRAMS AND SERVICES LEADING TO THE EMPLOYMENT OF FLORIDA CITIZENS WITH DISABILITIES.

4b (Code: ) (Expenses \$ 100,069. including grants of \$ ) (Revenue \$ 72,950. ) THE FLORIDA YOUTH LEADERSHIP FORUM (YLF) IS AN ANNUAL CAREER AND LEADERSHIP TRAINING PROGRAM THAT IS BOTH EDUCATIONAL AND MOTIVATIONAL. HIGH SCHOOL JUNIORS AND SENIORS ARE SELECTED EACH SUMMER TO SPEND A WEEK IN TALLAHASSEE, FLORIDA LEARNING ABOUT COMMUNITY AND ACADEMIC LEADERSHIP. THEY ALSO TAKE PART IN SOCIAL ACTIVITIES WHICH ENABLES THEM TO NETWORK, LEARN FROM EACH OTHER, AND BUILD FRIENDSHIPS THAT WILL LAST A LIFETIME. THE YLF IS SUPPORTED BY THE FLORIDA DEVELOPMENTAL DISABILITIES COUNCIL AND OTHER MAJOR SPONSORS.

4c (Code: ) (Expenses \$ 10,691. including grants of \$ ) (Revenue \$ ) FLORIDA DISABILITY EMPLOYMENT AWARENESS MONTH (DEAM) IS CELEBRATED EACH OCTOBER. DURING THIS TIME, STUDENTS AND YOUNG JOB SEEKERS ARE ABLE TO PARTICIPATE IN A VARIETY OF CAREER EXPERIENCES THAT PROVIDE A BETTER UNDERSTANDING OF PROFESSIONS AND THE NECESSARY SKILLS AND EDUCATION FOR A PARTICULAR CAREER. DEAM EXPERIENCES CAN TAKE THE FORM OF ONE-ON-ONE JOB SHADOWING, SITE VISITS, AND SMALL GROUP SHADOWING. BUSINESSES GAIN VALUABLE EXPERIENCE OF THE CAPABILITIES, AMBITION AND SKILL LEVEL OF PEOPLE WITH DISABILITIES THROUGH THEIR PARTICIPATION IN DEAM. THE GOAL OF DEAM IS TO ENCOURAGE BUSINESSES TO VIEW PEOPLE WITH DISABILITIES AS POTENTIAL EMPLOYEES.

4d Other program services (Describe in Schedule O.) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 2,597,051.

**Part IV Checklist of Required Schedules**

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> . . . . .	X	
2	Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)? . . . . .	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> . . . . .		X
4	<b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> . . . . .	X	
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i> . . . . .		
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i> . . . . .		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> . . . . .		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> . . . . .		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i> . . . . .		X
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> . . . . .		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> . . . . .	X	
b	Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i> . . . . .		X
c	Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i> . . . . .		X
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i> . . . . .	X	
e	Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> . . . . .		X
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i> . . . . .		X
12 a	Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> . . . . .	X	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> . . . . .		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> . . . . .		X
14 a	Did the organization maintain an office, employees, or agents outside of the United States? . . . . .		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i> . . . . .		X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Parts II and IV</i> . . . . .		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Parts III and IV</i> . . . . .		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions)</i> . . . . .		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> . . . . .	X	
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> . . . . .		X
20 a	Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> . . . . .		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .		

**Part IV Checklist of Required Schedules (continued)**

		Yes	No
21	Did the organization report more than \$5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i>	X	
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i>		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i>	X	
24 a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25.</i>		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25 a	<b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i>		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i>		X
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II.</i>		X
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i>		X
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
b	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV.</i>		X
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i>		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i>		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i>		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i>		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i>		X
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.</i>		X
35 a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		
36	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i>		X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.	X	

Form 990 (2012)

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V.

Table with columns for question number, description, sub-questions (1a-14b), and Yes/No columns. Includes questions about Form 1096, Form W-2G, Form W-3, Form 990-T, Form 8886-T, Form 8282, Form 8899, Form 1098-C, Form 4966, Form 501(c)(7), Form 501(c)(12), Form 4947(a)(1), and Form 501(c)(29).

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response to any question in this Part VI. [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include questions 1a, 1b, 2, 3, 4, 5, 6, 7a, 7b, 8a, 8b, 9.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include questions 10a, 10b, 11a, 11b, 12a, 12b, 12c, 13, 14, 15a, 15b, 16a, 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed NONE
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
19 Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: SUSANNE HOMANT 3320 THOMASVILLE ROAD TALLAHASSEE, FL 32308 850-224-4493

**Part VII**

**Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response to any question in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) RICHARD L COLE JR CHAIR	.20	X		X				0	0	0
(2) BRIDGET R. PALLANGO VICE CHAIR	.20	X		X				0	0	0
(3) JEANNIE AMENDOLA SECRETARY	.20	X		X				0	0	0
(4) MARCY BENTON TREASURER	.20	X		X				0	0	0
(5) JAMES R HARDING II DIRECTOR	.20	X						0	0	0
(6) KAREN MOORE DIRECTOR	.20	X						0	0	0
(7) ANNE MARIE TAGLIENTI DIRECTOR	.20	X						0	0	0
(8) ARLENE STATEN SHACKELFORD CHAIR	.20	X		X				0	0	0
(9) SUSANNE HOMANT PRESIDENT	60.00			X				184,356.	0	13,237.
(10) KATHERINE MCMANUS CHIEF DEVELOPMENT DIRECTOR	40.00					X		107,951.	0	13,191.
(11)										
(12)										
(13)										
(14)										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

Table with 6 main columns: (A) Name and title, (B) Average hours per week, (C) Position (Individual trustee or director, Institutional trustee, Officer, Key employee, Highest compensated employee, Former), (D) Reportable compensation from the organization (W-2/1099-MISC), (E) Reportable compensation from related organizations (W-2/1099-MISC), (F) Estimated amount of other compensation from the organization and related organizations. Includes sub-totals for lines 1b, 1c, and 1d.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 2

Table with 3 columns: Question number, Question text, Yes, No. Contains questions 3, 4, and 5 regarding compensation reporting.

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

Table with 3 columns: (A) Name and business address, (B) Description of services, (C) Compensation. Includes a total line for 2 Total number of independent contractors.

**Part VIII Statement of Revenue**

Check if Schedule O contains a response to any question in this Part VIII.

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	1a	Federated campaigns . . . . .	1a				
	b	Membership dues . . . . .	1b				
	c	Fundraising events . . . . .	1c				
	d	Related organizations . . . . .	1d				
	e	Government grants (contributions) . . . . .	1e	315,160.			
	f	All other contributions, gifts, grants, and similar amounts not included above . . . . .	1f	1,643,041.			
	g	Noncash contributions included in lines 1a-1f: \$ . . . . .					
	h	<b>Total.</b> Add lines 1a-1f . . . . .		1,958,201.			
<b>Program Service Revenue</b>			<b>Business Code</b>				
	2a	YOUTH LEADERSHIP FORUM . . . . .		72,950.	72,950.		
	b	DISABILITY MENTORING DAY . . . . .		19,000.	19,000.		
	c	. . . . .					
	d	. . . . .					
	e	. . . . .					
	f	All other program service revenue . . . . .					
	g	<b>Total.</b> Add lines 2a-2f . . . . .		91,950.			
<b>Other Revenue</b>	3	Investment income (including dividends, interest, and other similar amounts) . . . . .		518,374.		518,373.	
	4	Income from investment of tax-exempt bond proceeds . . . . .		0			
	5	Royalties . . . . .		0			
	6a	Gross rents . . . . .	(i) Real	(ii) Personal			
	b	Less: rental expenses . . . . .					
	c	Rental income or (loss) . . . . .					
	d	Net rental income or (loss) . . . . .		0			
	7a	Gross amount from sales of assets other than inventory . . . . .	(i) Securities	(ii) Other			
			7,803,137.				
	b	Less: cost or other basis and sales expenses . . . . .	7,319,944.				
	c	Gain or (loss) . . . . .	483,193.				
	d	Net gain or (loss) . . . . .		483,193.		483,193.	
	8a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . .	a	36,390.			
b			Less: direct expenses . . . . .	33,607.			
c			Net income or (loss) from fundraising events . . . . .		2,783.		2,783.
9a	Gross income from gaming activities. See Part IV, line 19 . . . . .	a					
		b	Less: direct expenses . . . . .				
		c	Net income or (loss) from gaming activities . . . . .		0		
10a	Gross sales of inventory, less returns and allowances . . . . .	a					
		b	Less: cost of goods sold . . . . .				
		c	Net income or (loss) from sales of inventory . . . . .		0		
<b>Miscellaneous Revenue</b>			<b>Business Code</b>				
11a	MOTORCYCLE PLATES . . . . .		31,582.	31,582.			
b	PERSONAL CARE ATTENDANT . . . . .		26,466.	26,466.			
c	GRANT FUNDS RETURNED . . . . .		14,633.	14,633.			
d	All other revenue . . . . .		1,522.	1,522.			
e	<b>Total.</b> Add lines 11a-11d . . . . .		74,203.				
12	<b>Total revenue.</b> See instructions . . . . .		3,128,704.	166,153.		1,004,349.	



**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response to any question in this Part IX

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>				
	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21 . . . . .	1,428,027.	1,428,027.		
2 Grants and other assistance to individuals in the United States. See Part IV, line 22 . . . . .	0			
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16 . . . . .	0			
4 Benefits paid to or for members . . . . .	0			
5 Compensation of current officers, directors, trustees, and key employees . . . . .	197,592.	143,300.	9,896.	44,396.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .	0			
7 Other salaries and wages . . . . .	490,560.	355,769.	24,569.	110,222.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .	20,628.	14,960.	1,033.	4,635.
9 Other employee benefits . . . . .	62,109.	45,043.	3,111.	13,955.
10 Payroll taxes . . . . .	49,261.	35,726.	2,467.	11,068.
11 Fees for services (non-employees):				
a Management . . . . .	0			
b Legal . . . . .	40,251.	29,191.	2,016.	9,044.
c Accounting . . . . .	25,930.	18,805.	1,299.	5,826.
d Lobbying . . . . .	0			
e Professional fundraising services. See Part IV, line 17	0			
f Investment management fees . . . . .	4,000.	2,901.	200.	899.
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .	11,888.	8,622.	595.	2,671.
12 Advertising and promotion . . . . .	64,798.	46,994.	3,245.	14,559.
13 Office expenses . . . . .	35,859.	26,006.	1,796.	8,057.
14 Information technology . . . . .	0			
15 Royalties . . . . .	0			
16 Occupancy . . . . .	110,063.	79,821.	5,512.	24,730.
17 Travel . . . . .	12,690.	9,203.	636.	2,851.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .	0			
19 Conferences, conventions, and meetings . . . . .	48,322.	35,045.	2,420.	10,857.
20 Interest . . . . .	0			
21 Payments to affiliates . . . . .	0			
22 Depreciation, depletion, and amortization . . . . .	11,684.	8,474.	585.	2,625.
23 Insurance . . . . .	6,227.	4,516.	312.	1,399.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a YOUTH LEADERSHIP FORUM . . . . .	116,654.	116,654.		
b HIGH SCHOOL/ HIGH TECH . . . . .	59,879.	59,879.		
c CEO PROGRAM MANAGEMENT . . . . .	51,768.	51,768.		
d DVR/STAFF EVENTS . . . . .	39,984.	39,984.		
e All other expenses . . . . .	45,064.	36,363.	1,586.	7,115.
25 Total functional expenses. Add lines 1 through 24e . . . . .	2,933,238.	2,597,051.	61,278.	274,909.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .	0			

**Part X Balance Sheet**

Check if Schedule O contains a response to any question in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash - non-interest-bearing	2,518,623.	1	2,080,707.
	2 Savings and temporary cash investments	0	2	0
	3 Pledges and grants receivable, net	0	3	0
	4 Accounts receivable, net	49.	4	330.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0	5	0
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L	0	6	0
	7 Notes and loans receivable, net	0	7	0
	8 Inventories for sale or use	0	8	0
	9 Prepaid expenses and deferred charges	11,466.	9	24,702.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 406,632.		
	b Less: accumulated depreciation	10b 233,680.	10c 169,761.	172,952.
	11 Investments - publicly traded securities	17,347,888.	11	18,807,828.
	12 Investments - other securities. See Part IV, line 11	0	12	0
	13 Investments - program-related. See Part IV, line 11	0	13	0
	14 Intangible assets	0	14	0
	15 Other assets. See Part IV, line 11	7,260,730.	15	7,595,747.
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	27,308,517.	16	28,682,266.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses	3,579,687.	17	3,797,281.
	18 Grants payable	0	18	0
	19 Deferred revenue	0	19	0
	20 Tax-exempt bond liabilities	0	20	0
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0	21	0
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L	0	22	0
	23 Secured mortgages and notes payable to unrelated third parties	0	23	0
	24 Unsecured notes and loans payable to unrelated third parties	0	24	0
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	0	25	0
	26 <b>Total liabilities.</b> Add lines 17 through 25	3,579,687.	26	3,797,281.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	27 Unrestricted net assets	20,215,058.	27	21,191,562.
	28 Temporarily restricted net assets	0	28	0
	29 Permanently restricted net assets	3,513,772.	29	3,693,423.
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
33 <b>Total net assets or fund balances</b>	23,728,830.	33	24,884,985.	
34 <b>Total liabilities and net assets/fund balances.</b>	27,308,517.	34	28,682,266.	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response to any question in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	3,128,704.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,933,238.
3	Revenue less expenses. Subtract line 2 from line 1	3	195,466.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	23,728,830.
5	Net unrealized gains (losses) on investments	5	960,689.
6	Donated services and use of facilities	6	0
7	Investment expenses	7	0
8	Prior period adjustments	8	0
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	24,884,985.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response to any question in this Part XII

- 1 Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .  
 If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b Were the organization's financial statements audited by an independent accountant? . . . . .  
 If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .
- b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No. 1545-0047

**2012**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization **THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.**

Employer identification number  
**59-3052307**

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An organization that normally receives: (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a  Type I    b  Type II    c  Type III-Functionally integrated    d  Type III-Non-functionally integrated
- e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
  - (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? 

	Yes	No
11g(i)		X
  - (ii) A family member of a person described in (i) above? 

11g(ii)		X
---------	--	---
  - (iii) A 35% controlled entity of a person described in (i) or (ii) above? 

11g(iii)		X
----------	--	---

h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
(A) ATTACHMENT 1									
(B)									
(C)									
(D)									
(E)									
<b>Total</b>									<b>2,597,051.</b>

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule A (Form 990 or 990-EZ) 2012

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
3 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
4 <b>Total.</b> Add lines 1 through 3 . . . . .						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f). . . . .						
6 <b>Public support.</b> Subtract line 5 from line 4.						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4 . . . . .						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
9 Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) . . . . .						
11 <b>Total support.</b> Add lines 7 through 10 . . . . .						
12 Gross receipts from related activities, etc. (see instructions) . . . . .					12	

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . .

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) . . . . .	14	%
15 Public support percentage from 2011 Schedule A, Part II, line 14 . . . . .	15	%
16a <b>33 1/3% support test - 2012.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 33 1/3% support test - 2011.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
17a <b>10%-facts-and-circumstances test - 2012.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 10%-facts-and-circumstances test - 2011.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . .		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Table with 7 columns: (a) 2008, (b) 2009, (c) 2010, (d) 2011, (e) 2012, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total. Add lines 1 through 5; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 7c Add lines 7a and 7b; 8 Public support (Subtract line 7c from line 6).

Section B. Total Support

Table with 7 columns: (a) 2008, (b) 2009, (c) 2010, (d) 2011, (e) 2012, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 10c Add lines 10a and 10b; 11 Net income from unrelated business activities not included in line 10b; 12 Other income. Do not include gain or loss from the sale of capital assets; 13 Total support. (Add lines 9, 10c, 11, and 12.); 14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here.

Section C. Computation of Public Support Percentage

Table with 3 columns: Description, Line Number, Percentage. Row 15: Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f)). Row 16: Public support percentage from 2011 Schedule A, Part III, line 15.

Section D. Computation of Investment Income Percentage

Table with 3 columns: Description, Line Number, Percentage. Row 17: Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f)). Row 18: Investment income percentage from 2011 Schedule A, Part III, line 17.

- 19a 33 1/3% support tests - 2012. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization.
b 33 1/3% support tests - 2011. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization.
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions.

**Part IV Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

ATTACHMENT 1

SCHEDULE A, PART I - INFORMATION ABOUT SUPPORTED ORGANIZATIONS

(I) NAME OF SUPPORTED ORGANIZATION	(II) EIN	(III) TYPE OF ORGANIZATION	(IV)		(V)		(VI)		(VII) AMOUNT OF SUPPORT
			YES	NO	YES	NO	YES	NO	
STATE OF FLORIDA DIVISION OF VOCATIONAL REHABILITATION			X		X		X		2,597,051.
TOTAL AMOUNT OF SUPPORT									<u>2,597,051</u>

**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

**2012**

<b>Name of the organization</b> THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.	<b>Employer identification number</b> 59-3052307
--	---

**Organization type (check one):**

**Filers of:**

**Section:**

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).



<b>Name of organization</b> THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.	<b>Employer identification number</b> 59-3052307
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**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	AMERICAN EXPRESS CHARITABLE FUND 777 AMERICAN EXPRESS WAY FT. LAUDERDALE, FL 33337	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	DARDEN RESTAURANTS, INC. FOUNDATION PO BOX 695012 ORLANDO, FL 32869-5012	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	STATE OF FLORIDA DEPT. OF EDUCATION/VR 4070 ESPLANADE WAY TALLAHASSEE, FL 32399-7016	\$ 315,160.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
4	THOMAS M. & IRENE B. KIRBO CHARITABLE TR 2720 PARK ST., SUITE 211 JACKSONVILLE, FL 32205-7645	\$ 8,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
5	FL DEVELOPMENTAL DISABILITIES COUNCIL 124 MARRIOTT DRIVE, STE. 203 TALLAHASSEE, FL 32301	\$ 40,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
6	TD CHARITABLE FOUNDATION ONE PORTLAND SQUARE P.O. BOX 9540 PORTLAND, ME 04112	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Name of organization THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC.

Employer identification number  
59-3052307

**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- -----	\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- -----	\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- -----	\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- -----	\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- -----	\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- -----	\$-----	-----

Name of organization <b>THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.</b>	Employer identification number <b>59-3052307</b>
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**Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry.**

For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
----- ----- -----		----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
----- ----- -----		----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
----- ----- -----		----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
----- ----- -----		----- ----- -----	

**SCHEDULE C**  
**(Form 990 or 990-EZ)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**For Organizations Exempt From Income Tax Under section 501(c) and section 527**

- ▶ **Complete if the organization is described below.**
- ▶ **Attach to Form 990 or Form 990-EZ.**
- ▶ **See separate instructions.**

Department of the Treasury  
Internal Revenue Service

**2012**

**Open to Public Inspection**

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax) or Form 990-EZ, Part V, line 35c (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization <b>THE FLORIDA ENDOWMENT FOUNDATION</b> <b>FOR VOCATIONAL REHABILITATION, INC.</b>	Employer identification number <b>59-3052307</b>
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**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political expenditures . . . . . ▶ \$ \_\_\_\_\_
- 3 Volunteer hours . . . . . \_\_\_\_\_

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955. . . . . ▶ \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 . . . . . ▶ \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? . . . . .  Yes  No
- 4a Was a correction made? . . . . .  Yes  No
- b If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities . . . . . ▶ \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities . . . . . ▶ \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b . . . . . ▶ \$ \_\_\_\_\_
- 4 Did the filing organization file Form 1120-POL for this year? . . . . .  Yes  No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
(1)	-----			
(2)	-----			
(3)	-----			
(4)	-----			
(5)	-----			
(6)	-----			

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990 or 990-EZ) 2012

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
<b>1 a</b>	Total lobbying expenditures to influence public opinion (grass roots lobbying) . . . . .														
<b>b</b>	Total lobbying expenditures to influence a legislative body (direct lobbying) . . . . .														
<b>c</b>	Total lobbying expenditures (add lines 1a and 1b) . . . . .														
<b>d</b>	Other exempt purpose expenditures . . . . .														
<b>e</b>	Total exempt purpose expenditures (add lines 1c and 1d) . . . . .														
<b>f</b>	Lobbying nontaxable amount. Enter the amount from the following table in both columns.														
<table border="1"> <tr> <td><b>If the amount on line 1e, column (a) or (b) is:</b></td> <td><b>The lobbying nontaxable amount is:</b></td> </tr> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </table>		<b>If the amount on line 1e, column (a) or (b) is:</b>	<b>The lobbying nontaxable amount is:</b>	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.		
<b>If the amount on line 1e, column (a) or (b) is:</b>	<b>The lobbying nontaxable amount is:</b>														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
<b>g</b>	Grassroots nontaxable amount (enter 25% of line 1f) . . . . .														
<b>h</b>	Subtract line 1g from line 1a. If zero or less, enter -0- . . . . .														
<b>i</b>	Subtract line 1f from line 1c. If zero or less, enter -0- . . . . .														
<b>j</b>	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? . . . . .		<input type="checkbox"/> Yes <input type="checkbox"/> No												

**4-Year Averaging Period Under Section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) Total
<b>2 a</b> Lobbying nontaxable amount					
<b>b</b> Lobbying ceiling amount (150% of line 2a, column (e))					
<b>c</b> Total lobbying expenditures					
<b>d</b> Grassroots nontaxable amount					
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					
<b>f</b> Grassroots lobbying expenditures					

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

Table with 3 main columns: (a) Yes/No, (b) Amount. Rows include: 1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation... 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

Table with 3 columns: Question, Yes, No. Rows include: 1 Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carry over lobbying and political expenditures from the prior year?

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No," OR (b) Part III-A, line 3, is answered "Yes."

Table with 2 columns: Question, Amount. Rows include: 1 Dues, assessments and similar amounts from members 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).

Part IV Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, line 2; and Part II-B, line 1. Also, complete this part for any additional information.

SCHEDULE C, PART II-B, LINE I

DIRECT CONTACT WITH LEGISLATORS AND GOVERNMENT OFFICIALS TO MONITOR

LEGISLATION THAT AFFECTS VOCATIONAL REHABILITATION.

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**Part IV** Supplemental Information *(continued)*

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SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2012

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990. See separate instructions.

Name of the organization THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.

Employer identification number 59-3052307

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include: 1 Total number at end of year, 2 Aggregate contributions to (during year), 3 Aggregate grants from (during year), 4 Aggregate value at end of year, 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?, 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

Table with 2 columns: Held at the End of the Tax Year. Rows include: 1 Purpose(s) of conservation easements held by the organization (check all that apply), 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year, 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year, 4 Number of states where property subject to conservation easement is located, 5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?, 6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year, 7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year, 8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?, 9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

Table with 2 columns: Amounts. Rows include: 1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items, b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items: (i) Revenues included in Form 990, Part VIII, line 1, (ii) Assets included in Form 990, Part X, 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items: a Revenues included in Form 990, Part VIII, line 1, b Assets included in Form 990, Part X

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2012



**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange programs
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . . .  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . .  Yes  No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |   | Amount |
|---|--------|
| c Beginning balance . . . . .             | 1c     |
| d Additions during the year . . . . .     | 1d     |
| e Distributions during the year . . . . . | 1e     |
| f Ending balance . . . . .                | 1f     |
- 2a Did the organization include an amount on Form 990, Part X, line 21? . . . . .  Yes  No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII. . . . .

**Part V Endowment Funds.** Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance . . . . .					
b Contributions . . . . .					
c Net investment earnings, gains, and losses . . . . .					
d Grants or scholarships . . . . .					
e Other expenditures for facilities and programs . . . . .					
f Administrative expenses . . . . .					
g End of year balance . . . . .					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment ▶ \_\_\_\_\_ %
  - b Permanent endowment ▶ \_\_\_\_\_ %
  - c Temporarily restricted endowment ▶ \_\_\_\_\_ %
- The percentages in lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |   | Yes    | No |
|---|--------|----|
| (i) unrelated organizations . . . . .   | 3a(i)  |    |
| (ii) related organizations . . . . .  | 3a(ii) |    |
| b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? . . . . . | 3b     |    |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land . . . . .				
b Buildings . . . . .				
c Leasehold improvements . . . . .		164,921.	18,392.	146,529.
d Equipment . . . . .		87,554.	71,157.	16,397.
e Other . . . . .		154,157.	144,131.	10,026.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . . .				172,952.

**Part VII Investments - Other Securities.** See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .		
(3) Other _____		
(A) _____		
(B) _____		
(C) _____		
(D) _____		
(E) _____		
(F) _____		
(G) _____		
(H) _____		
(I) _____		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.** See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.** See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) RESTRICTED CASH	3,708,927.
(2) RESTRICTED INVESTMENTS	2,702,892.
(3) CONTRIBUTIONS RECEIVABLE (DEF)	845,731.
(4) ANNUITY RECEIVABLE	144,805.
(5) INSURANCE RECEIVABLE	107,974.
(6) DUE FROM DIVISION OF REHAB.	78,790.
(7) DUE FROM DOT	2,628.
(8) DEPOSITS	4,000.
(9)	
(10)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) . . . . . ▶	7,595,747.

**Part X Other Liabilities.** See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	

2. FIN 48 (ASC 740) Footnote. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII.

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

<b>1</b>	Total revenue, gains, and other support per audited financial statements	<b>1</b>	4,123,000.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
<b>a</b>	Net unrealized gains on investments	<b>2a</b>	960,689.
<b>b</b>	Donated services and use of facilities	<b>2b</b>	
<b>c</b>	Recoveries of prior year grants	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	960,689.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	3,162,311.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	-33,607.
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	-33,607.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)	<b>5</b>	3,128,704.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

<b>1</b>	Total expenses and losses per audited financial statements	<b>1</b>	2,966,845.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
<b>a</b>	Donated services and use of facilities	<b>2a</b>	
<b>b</b>	Prior year adjustments	<b>2b</b>	
<b>c</b>	Other losses	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	33,607.
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	33,607.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	2,933,238.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)	<b>5</b>	2,933,238.

**Part XIII Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

SEE PAGE 5

TEXT

**Part XIII** Supplemental Information (continued)

---

SCHEDULE D, PART XI, LINE 4B

FUNDRAISING EXPENSES: (\$33,607)

SCHEDULE D, PART XII, LINE 2D

FUNDRAISING EXPENSES: \$33,607

**SCHEDULE G**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information Regarding  
Fundraising or Gaming Activities**

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.  
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization **THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC.**

Employer identification number  
**59-3052307**

**Part I Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17.  
Form 990-EZ filers are not required to complete this part.

**1** Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- |  |   |
|--|---|
| <b>a</b> <input type="checkbox"/> Mail solicitations               | <b>e</b> <input type="checkbox"/> Solicitation of non-government grants |
| <b>b</b> <input type="checkbox"/> Internet and email solicitations | <b>f</b> <input type="checkbox"/> Solicitation of government grants     |
| <b>c</b> <input type="checkbox"/> Phone solicitations              | <b>g</b> <input type="checkbox"/> Special fundraising events            |
| <b>d</b> <input type="checkbox"/> In-person solicitations          |   |

**2a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?  Yes  No

**b** If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
<b>Total</b> .....						

**3** List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II Fundraising Events. Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

Table with 5 columns: (a) Event #1 ANNUAL FUNDRAIS (event type), (b) Event #2 (event type), (c) Other events (total number), (d) Total events (add col. (a) through col. (c)). Rows include Revenue (1-3) and Direct Expenses (4-11).

Part III Gaming. Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

Table with 5 columns: (a) Bingo, (b) Pull tabs/instant bingo/progressive bingo, (c) Other gaming, (d) Total gaming (add col. (a) through col. (c)). Rows include Revenue (1) and Direct Expenses (2-5), plus summary rows 6-8.

9 Enter the state(s) in which the organization operates gaming activities:
a Is the organization licensed to operate gaming activities in each of these states? [ ] Yes [ ] No
b If "No," explain:

10 a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? [ ] Yes [ ] No
b If "Yes," explain:

- 11 Does the organization operate gaming activities with nonmembers?  Yes  No
- 12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?  Yes  No
- 13 Indicate the percentage of gaming activity operated in:
 

a The organization's facility	13a	%
b An outside facility	13b	%
- 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

- 15 a Does the organization have a contract with a third party from whom the organization receives gaming revenue?  Yes  No
- b If "Yes," enter the amount of gaming revenue received by the organization ▶ \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ▶ \$ \_\_\_\_\_.
- c If "Yes," enter name and address of the third party:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

16 Gaming manager information:

Name ▶ \_\_\_\_\_

Gaming manager compensation ▶ \$ \_\_\_\_\_

Description of services provided ▶ \_\_\_\_\_

- Director/officer
- Employee
- Independent contractor

17 Mandatory distributions:

- a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?  Yes  No
- b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ \_\_\_\_\_

**Part IV Supplemental Information.** Complete this part to provide the explanation required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).

**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

OMB No. 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization  
FOR VOCATIONAL REHABILITATION, INC.

THE FLORIDA ENDOWMENT FOUNDATION

Employer identification number  
59-3052307

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.  Yes  No

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1	(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1)	ABILITY 1ST 1823 BUFORD COURT TALL., FL 32308	59-2091522	501(C)(3)	60,000.				VOCATIONAL PROGRAMS
(2)	BEACON COLLEGE							
(3)	BREVARD SCHOOLS FOUNDATION							VOCATIONAL PROGRAMS
(4)	2700 JUD. FRAN JAMIESON WY. VIERA, FL 32940	59-2895155	501(C)(3)	36,340.				VOCATIONAL PROGRAMS
(4)	BROOKS HEALTH FOUNDATION							
(5)	3599 UNIV. BLVD. S. JAX., FL 32216	59-2249340	501(C)(3)	54,500.				VOCATIONAL PROGRAMS
(5)	CENTER FOR IND LIV OF BROWARD							
(6)	4800 N. STATE RD 7 FT. LAUDERDALE, FL 33319	65-0292125	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(6)	CENTER FOR IND LIVING CENTRAL FL							
(7)	720 N. DENNING DRIVE WINTER PARK, FL 32789	59-1828770	501(C)(3)	25,000.				VOCATIONAL PROGRAMS
(7)	CENTER FOR IND. LIVING N. CENTRAL FL							
(8)	222 SW 36TH TERRACE GAINESVILLE, FL 32607	59-2177488	501(C)(3)	120,000.				VOCATIONAL PROGRAMS
(8)	CENTER FOR IND. LIVING SOUTH FL							
(9)	6660 BISCAYNE BLVD. MIAMI, FL 33138	65-0379532	501(C)(3)	50,000.				VOCATIONAL PROGRAMS
(9)	COM HAVEN FOR CHILDREN							
(10)	4405 DESOTO ROAD SARASOTA, FL 34235	59-1305522	501(C)(3)	40,000.				VOCATIONAL PROGRAMS
(10)	COMMUNITY BASED CARE OF CENTRAL FL							
(11)	4001 PELEE STREET ORLANDO, FL 32817	01-0631375	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(11)	CREATIVE CLAY, INC.							
(12)	DAN MARINO FOUNDATION							
(12)	DAN MARINO FOUNDATION							VOCATIONAL PROGRAMS

- 2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table
- 3 Enter total number of other organizations listed in the line 1 table

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) (2012)



**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

OMB No. 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization

THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC.

Employer identification number

59-3052307

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.  Yes  No

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1	(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1)	DYSLEXIA RESEARCH INSTITUTE HSHT 5746 CENTERVILLE ROAD TALL., FL 32308		501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(2)	FLORIDA CROWN WORKFORCE BOARD, INC. 1389 US HWY 90 W. LAKE CITY, FL 32055	59-3531927	501(C)(3)	80,000.				VOCATIONAL PROGRAMS
(3)	FLORIDA LIONS CONKLIN CENTERS		501(C)(3)	50,000.				VOCATIONAL PROGRAMS
(4)	FOUND. FOR ORANGE CTY PUB. SCHOOLS HSHT 445 W. AMELIA ST. ORLANDO, FL 32801	59-2788435	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(5)	GOODWILL EASTER SEALS GULF (AL) 2448 GORDON SMITH DR. MOBILE, AL 36617	63-0363472	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(6)	GOODWILL FOUNDATION		501(C)(3)	12,500.				VOCATIONAL PROGRAMS
(7)	GOODWILL IND. SW FLORIDA 4940 BAYLINE DRIVE N. FORT MYERS, FL 33917	59-6196141	501(C)(3)	60,000.				VOCATIONAL PROGRAMS
(8)	GULFSTREAM GOODWILL INDUSTRIES, INC. 1715 TIFFANY DRIVE E. WPB, FL 33407	59-1197040	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(9)	HOPE HAVEN CHILDREN'S CL. & FAM		501(C)(3)	37,000.				VOCATIONAL PROGRAMS
(10)	JIRC/NE FLORIDA 2709 ART MUSEUM DR. JAX., FL 32207	59-1842440	501(C)(3)	100,000.				VOCATIONAL PROGRAMS
(11)	LIGHTHOUSE WORKS, INC. 421 E. ROBINSON ST. ORLANDO, FL 32801	27-4598398	501(C)(3)	12,500.				VOCATIONAL PROGRAMS
(12)	MADISON COUNTY SCHOOL BOARD - ESE 312 NE DUVAL ST. MADISON, FL 32340		501(C)(3)	20,000.				VOCATIONAL PROGRAMS

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

3 Enter total number of other organizations listed in the line 1 table

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) (2012)

JSA

**SCHEDULE I  
(Form 990)**

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

OMB No. 1545-0047

**2012**

Department of the Treasury  
Internal Revenue Service

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

**Open to Public  
Inspection**

Name of the organization THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC. Employer identification number 59-3052307

**Part I General Information on Grants and Assistance**

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.  Yes  No

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1	(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1)	MIAMI LIGHTHOUSE FOR THE BLIND 601 SW 8TH AVENUE MIAMI, FL 33130	59-0637847	501(C)(3)	16,100.				VOCATIONAL PROGRAMS
(2)	GUEST, INC. PO BOX 531125 ORLANDO, FL 32853	59-2013160	501(C)(3)	37,000.				VOCATIONAL PROGRAMS
(3)	SCHOOL DISTRICT HILLSBOROUGH COUNTY 5410 NORTH 20TH ST., TAMPA, FL 33610	59-0874493	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(4)	SERVICE SOURCE 2735 WHITNEY ROAD CLEARWATER, FL 33760	59-1954362	501(C)(3)	70,000.				VOCATIONAL PROGRAMS
(5)	ST. PETERSBURG COLLEGE FOUNDATION PO BOX 13489 ST. PETERSBURG, FL 33733	65-0357736	501(C)(3)	70,000.				VOCATIONAL PROGRAMS
(6)	STAND AMONG FRIENDS 777 GLADES ROAD BOCA RATON, FL 33431	65-0583089	501(C)(3)	20,000.				VOCATIONAL PROGRAMS
(7)	SUSAN B. ANTHONY RECOVERY CENTER 1633 POINCIANA DR. PEMBROKE PINES, FL 33025	26-3727540	501(C)(3)	28,500.				VOCATIONAL PROGRAMS
(8)	THE KEY CLUBHOUSE OF SOUTH FL 260 NE 17TH TERRACE MIAMI, FL 33132	501(C)(3)	501(C)(3)	37,000.				VOCATIONAL PROGRAMS
(9)	THE PEPIN ACADEMIES, INC. (10) VAN GOGH'S PALLETTE, INC. PO BOX 2071 PINELLAS PARK, FL 33781	59-3720139	501(C)(3)	27,000.				VOCATIONAL PROGRAMS
(11)	VSA ARTS OF FLORIDA, INC. (12) WESTCARE GULF COAST FLORIDA, INC. PO BOX 12019 ST. PETERSBURG, FL 33733	59-3714627	501(C)(3)	37,000.				VOCATIONAL PROGRAMS

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table
- 3** Enter total number of other organizations listed in the line 1 table

**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

OMB No. 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC. Employer identification number 59-3052307

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.  Yes  No

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1	(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1)	WFSU 1600 RED BARBER PLAZA TALL., FL 32310	59-6152180	501(C)(3)	22,288.				VOCATIONAL PROGRAMS
(2)	-----							
(3)	-----							
(4)	-----							
(5)	-----							
(6)	-----							
(7)	-----							
(8)	-----							
(9)	-----							
(10)	-----							
(11)	-----							
(12)	-----							

- 2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table
- 3 Enter total number of other organizations listed in the line 1 table

Schedule I (Form 990) (2012)

**Part III** Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

	(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1						
2						
3						
4						
5						
6						
7						

**Part IV** Supplemental Information. Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

**SCHEDULE J  
(Form 990)**

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 23.

▶ Attach to Form 990. ▶ See separate instructions.

OMB No. 1545-0047

**2012**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization **THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC.**

Employer identification number  
**59-3052307**

**Part I Questions Regarding Compensation**

	Yes	No
<b>1a</b> Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.		
<input type="checkbox"/> First-class or charter travel		
<input type="checkbox"/> Travel for companions		
<input type="checkbox"/> Tax indemnification and gross-up payments		
<input type="checkbox"/> Discretionary spending account		
<input type="checkbox"/> Housing allowance or residence for personal use		
<input type="checkbox"/> Payments for business use of personal residence		
<input type="checkbox"/> Health or social club dues or initiation fees		
<input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)		
<b>b</b> If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	<b>1b</b>	
<b>2</b> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	<b>2</b>	
<b>3</b> Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.		
<input checked="" type="checkbox"/> Compensation committee		
<input type="checkbox"/> Independent compensation consultant		
<input type="checkbox"/> Form 990 of other organizations		
<input type="checkbox"/> Written employment contract		
<input checked="" type="checkbox"/> Compensation survey or study		
<input checked="" type="checkbox"/> Approval by the board or compensation committee		
<b>4</b> During the year, did any person listed in Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:		
<b>a</b> Receive a severance payment or change-of-control payment?	<b>4a</b>	X
<b>b</b> Participate in, or receive payment from, a supplemental nonqualified retirement plan?	<b>4b</b>	X
<b>c</b> Participate in, or receive payment from, an equity-based compensation arrangement?	<b>4c</b>	X
If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.		
<b>Only section 501(c)(3) and 501(c)(4) organizations must complete lines 5-9.</b>		
<b>5</b> For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
<b>a</b> The organization?	<b>5a</b>	X
<b>b</b> Any related organization?	<b>5b</b>	X
If "Yes" to line 5a or 5b, describe in Part III.		
<b>6</b> For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:		
<b>a</b> The organization?	<b>6a</b>	X
<b>b</b> Any related organization?	<b>6b</b>	X
If "Yes" to line 6a or 6b, describe in Part III.		
<b>7</b> For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	<b>7</b>	X
<b>8</b> Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	<b>8</b>	X
<b>9</b> If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	<b>9</b>	

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2012

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.  
**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported as deferred in prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
SUSANNE HOMANT							
1 PRESIDENT	(i) 174,356. (ii) 0 (iii) 0	10,000. 0	0	9,458. 0	3,779. 0	197,593. 0	0
2	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
3	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
4	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
5	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
6	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
7	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
8	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
9	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
10	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
11	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
12	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
13	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
14	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
15	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---
16	(i) --- (ii) --- (iii) ---	---	---	---	---	---	---

**Part III Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

**SCHEDULE O**  
(Form 990 or 990-EZ)

**Supplemental Information to Form 990 or 990-EZ**

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
▶ Attach to Form 990 or 990-EZ.

**2012**  
**Open to Public  
Inspection**

Name of the organization THE FLORIDA ENDOWMENT FOUNDATION  
FOR VOCATIONAL REHABILITATION, INC.

Employer identification number  
59-3052307

FORM 990, PART 1, LINE 1

TO SERVE AS A DIRECT SUPPORT ORGANIZATION FOR THE STATE OF FLORIDA  
DIVISION OF VOCATIONAL REHABILITATION; TO PROVIDE GRANTS AND RAISE FUNDS  
TO SUPPORT VOCATIONAL REHABILITATION PROGRAMS AND SERVICES LEADING TO THE  
EMPLOYMENT OF FLORIDA CITIZENS WITH DISABILITIES; TO INCREASE THE  
EMPLOYMENT OF FLORIDIANS WITH DISABILITIES, PROMOTE AWARENESS OF THEIR  
DISABILITIES, AND SERVE AS A LIAISON TO THE OFFICE OF DISABILITY  
EMPLOYMENT POLICY.

PART VI, LINE 11B

THE BOARD OF DIRECTORS ARE PROVIDED A COPY OF THE FORM 990 TO REVIEW  
PRIOR TO FILING.

PART VI, LINE 12C

THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS MONITORS THE POLICY  
ANNUALLY AND PERIODICALLY AS APPROPRIATE.

PART VI, LINE 15A

THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS ANNUALLY REVIEWS AND  
APPROVES THE BASE SALARY OF THE PRESIDENT AND CEO.

PART VI, LINE 15B

THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS REVIEWS THE BASE SALARY  
AND ANNUAL INCENTIVE OPPORTUNITIES OF THE PRESIDENT.



Name of the organization THE FLORIDA ENDOWMENT FOUNDATION FOR VOCATIONAL REHABILITATION, INC.	Employer identification number 59-3052307
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PART VI, LINE 19

ALL GOVERNING DOCUMENTS ARE AVAILABLE TO THE PUBLIC. SOME DOCUMENTS ARE  
ON THE WEBSITE AND THE REMAINDER ARE AVAILABLE UPON REQUEST.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO SERVE AS A DIRECT SUPPORT ORGANIZATION FOR THE STATE OF FLORIDA  
DIVISION OF VOCATIONAL REHABILITATION; TO PROVIDE GRANTS AND RAISE  
FUNDS TO SUPPORT VOCATIONAL REHABILITATION PROGRAMS AND SERVICES  
LEADING TO THE EMPLOYMENT OF FLORIDA CITIZENS WITH DISABILITIES; TO  
INCREASE THE EMPLOYMENT OF FLORIDIANS WITH DISABILITIES, PROMOTE  
AWARENESS OF THEIR DISABILITIES, AND SERVE AS A LIASION TO THE OFFICE  
OF DISABILITY EMPLOYMENT POLICY.

## Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Enter filer's identifying number, see instructions

<b>Type or print</b>  <small>File by the due date for filing your return. See instructions.</small>	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	THE ABLE TRUST	X 59-3052307
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	3320 THOMASVILLE ROAD, SUITE 200 City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	TALLAHASSEE, FL 32308	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 1

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720- (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ MICHELLE YOUNG, AD OF FINANCE

Telephone No. ▶ 850-222-4493

FAX No. ▶ 850-224-4496

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box  . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until FEBRUARY 17, 20 14, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶  calendar year 20\_\_\_\_ or

▶  tax year beginning 07/01, 20 12, and ending 06/30, 20 13.

2 If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b> \$
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b> \$
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b> \$

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.