



Who are we?

We Are Responsible.

We Are Giving.

We Are Results.



Responsible

Youth Leadership Walker County (YLWC) offers 11th grade students the opportunity to make friends while learning how to make a difference. Students are selected from each high school in Walker County to attend monthly meetings in which they learn about teamwork, our local and state government, educational opportunities and philanthropy. • Walker Area Community Foundation entrusts YLWC with \$10,000 to conduct a grants process. Through this process, nonprofits and/or school clubs may apply to YLWC stating their purpose, project and budget. Students review applications, interview organizations and debate who should or should not receive funding. Through this process, students learn how to communicate and collaborate in the correct way while working with their peers. It's not always easy for them, but it is always fun. • Jonah Trotter, a graduate of the 2015-2016 class, says, "The grant process

"The responsible thing is to start by taking care of the people in your community first."

JONAH TROTTER, *Walker County Youth Leadership graduate*

was a fun and an eye-opening experience. My view going into the process was the money needed to be spent to benefit the Walker County area because I believe you should help your community first, then worry about those in need outside of your community. In Acts 1:8, Jesus states, 'But you will receive power when the Holy Spirit has come upon you, and you will be my witnesses in Jerusalem and in all Judea and Samaria, and to the ends of the earth.' That verse stuck out to me during this application process and showed me how important it is not to ever forget where you come from." • We believe one of the most responsible things we can do as the community's foundation is to train the next generation on the importance of giving back. In doing so, they won't forget where they came from, remembering to give back to the community that taught them how to be a leader in the first place.



Giving

Investing in our community's future is the primary reason Emily Donaldson gives to Walker Area Community Foundation. The Foundation awards grant money to organizations that meet community needs, as well as projects close to the community's heart. Projects in areas include: arts and humanities, children and youth, education, healthcare, eldercare, recreation and social welfare. • Emily serves on the Foundation's Grant Review Committee. This committee, made up of nine volunteers, is charged with reviewing the grant applications received by the Foundation each cycle. "The Community Foundation has a grant application process that is one of the best I have seen. I have been on the other side writing grants, and the process that the Foundation uses is effective. Everyone, from the Donor Advised Funds to the Grant Review Committee to the Board of Directors, is very personally involved in making sure the funds

"I happily give to the Community Foundation because they ensure that my gifts will fund worthwhile projects that benefit the community."

EMILY DONALDSON, *Attorney at Law*

are awarded in a way that the community receives the most benefit." She feels that her service on the Grant Review Committee is the most rewarding way to give of her time. • She often marvels at all of the projects Walker County nonprofits have to offer to so many cross sections of our community. Each day she comes across something that the Foundation has a hand in that is bettering not only individual people but the community as a whole. She often has the opportunity to direct clients and others to different services that she has learned of through her involvement with the Foundation and through her donations of time and money.



Results

John T. Oliver, Jr. learned long ago that it's hard to give away large sums of money intelligently. As leader of the Bankhead Foundation, he wanted the gifts they gave to have true community impact. One day a brochure about community foundations came in the mail. The information said you shouldn't even think about it unless your community has a population of at least 100,000 people, so he set it aside. • Opportunity soon presented itself. The local hospital was being sold, and it was the perfect way to find the seed money to begin a community foundation. John asked the hospital board to give some of the proceeds to the community to begin a foundation. He was successful, and the Walker Area Community Foundation was born. • The Board of Directors made up of John T. Oliver, Jr., Larry Drummond, J. George Mitnick and Pat Willingham, began making community grants. Over the

“ We had an image problem; we needed a place we could show off our pride in our County. It's really pretty unusual to have so many important political figures from one community. It is our responsibility to educate the next generation.”

JOHN T. OLIVER, JR. *on the Bankhead House & Heritage Center*

years, staff was hired, and the Foundation found its purpose in the Walker area. We are responsible. We are giving. And we certainly produce results. • In 2007, the home of Speaker of the House William B. Bankhead was in disrepair. John secured funding from several private donors for the Foundation to purchase and renovate what is now Bankhead House & Heritage Center. • Through the Foundation's continued operation of the Center, John believes our credibility continues to grow. “It's truly a gift to the community; there is no personal benefit. The Heritage Center has a strong volunteer base at heart. We just want people to understand their heritage in Walker County.” • The legacy of John T. Oliver, Jr. will forever impact Walker County. For John, being responsible with money, giving generously to your community and producing results just makes sense. It's who he is.



Responsible

Max Campbell is not just our independent auditor, he's a part of our Foundation family. He travels to Jasper each year and takes over our boardroom as his office. We talk of our travels, concerts and great places to eat while he unpacks his computer, screens and scanner. Then he attentively listens to the happenings of the Foundation, picking up on details everyone else passes right over. It's why he's so good and why we trust him completely to review our records. • He received a B.S. degree in accounting from the University of Alabama in Huntsville, a masters degree in accounting from the University of Alabama at Birmingham and further graduate level work at Auburn University. He has been in the accounting profession for 23 years, with six years as an accountant in industry and 17 years in public accounting. Max has extensive experience with nonprofit organizations. • A partner

"I have found that the Foundation takes its role in the handling, managing and disbursing of the assets under their control in a very responsible manner and in a manner consistent with their mission."

MAX CAMPBELL, *Independent Auditor and Partner at Haynes Downard*

at Haynes Downard, he provides a yearly Audit – an intensive examination with the highest level of assurance – for the Foundation. Based on his experience in performing the audit of the Foundation, he has found that we operate in a very financially responsible manner in our dealings with donors, grantees and in the community at large. Appropriate policies have been adopted and are adhered to in the highest professional manner. • He answers questions about every random situation we face while he is here, as well as throughout the year, many times laughing with us over the complexities of fiscal management and giving us examples of how things work in the other nonprofits he audits. Then he moves on to the next nonprofit in the next town, because he's a part of their family, as well.



Giving

Originally from Weogufka, Alabama, Shannon Williamson became a widow in 2005 while working as a manager with Small Finance in Georgia. She and her youngest son moved to Walker County to help her disabled brother and wife. Work was hard to come by, so it was a struggle to make ends meet. Shannon began a part-time job at Quality Inn which helped, but it did not provide the financial stability she needed. After a year, she became the outreach coordinator at Capstone Rural Health Center, working both jobs for the next six months to build a solid financial foundation. • Through it all, Mission of Hope – one of the many nonprofits this Foundation funds – was a constant source of support. The loving staff assisted her family with food several times as she worked to get back on her feet.

“ God has a unique way of bringing everything in our lives full circle. I was once in need, but now I am able to talk about Mission of Hope as a resource for my patients at Capstone, as well as other services I know would benefit the many participants there.”

SHANNON WILLIAMSON, *Outreach Coordinator at Capstone Rural Health and past client of Mission of Hope*

They were a source of inspiration and provided a Christian approach to the assistance they offered. This was needed at the time because Shannon was overwhelmed, anxious about her finances and trying to find a job that would provide her with the means to take care of her family without needing assistance. • Shannon says, “God has a unique way of bringing everything in our lives full circle. I was once in need, but now I am able to talk about Mission of Hope as a resource for my patients at Capstone, as well as other services I know would benefit the many participants there.” She now serves as a Board Member for Walker County Coalition for the Homeless and for Walker County Community Action. • Shannon loves to coupon, so she has a stockpile of food that she can share with those in need. “Most of the time I carry a bag of food in my car in case I encounter someone who is need. I will have food and even some personal hygiene items I can bless someone with! I want to give back to the community and help people just as I was helped a few years ago.”



Results

Jason Adkins has always believed that pre-k initiatives would be beneficial to students. He studied the logistics of implementing quality pre-k programs for a long time, trying to get a grasp of the financial and building space obligations that would go along with new personnel and new classrooms. Initially, there was a tremendous challenge to overcome from a budget standpoint, which led Jason to the financial viewpoint that a pre-k program is a grant-funded endeavor. • At the same time, the staff of the Foundation was attending workshops on the benefits of pre-k and eventually scheduled a series of meetings with Jason where all questions were answered and fears were assuaged. At that point, the Walker County School System began applying for First Class Pre-K grants and secured seven centers in the first year of implementation. • First Class: Alabama's Voluntary pre-k is part of the Of-

“The Foundation is a unique group of talented individuals who see through the borders of class, gender, race and socio-economic status to the heart of real issues that affect real people.”

JASON ADKINS, *Superintendent, Walker County School System*

fice of School Readiness within the State Department of Education. First Class Pre-K prepares children for school success and lifelong learning. According to the Office of School Readiness, numerous studies have shown that participating students are less likely to repeat a grade, require remedial education or be placed in special education. Students also score higher on achievement tests and are more likely to graduate from high school, go on to college and receive higher-paying salaries as adults. • According to Jason, “Walker County pre-k classrooms have surpassed all expectation in terms of purpose, value to the children’s future success and effective instruction during this crucial time of early child development.” The Foundation may have convened the meetings and the State Department may have given the funding, but our school system is doing the hard work to educate our children and when our children win, we all win.



Responsible

This community foundation invests millions of dollars each year with nonprofit organizations serving our community. Because of this investment we have a vital interest in their success, as well as a responsibility to our donors that the gifts given to us are making the greatest impact possible. Therefore, it has long been the habit of this foundation to look for ways to strengthen our partnering nonprofit organizations. • Many of our nonprofits are faithful attendees to our monthly Nonprofit Council meetings and over the last few years were an integral part of the Foundation's Strategic Planning. Through that process, they identified training opportunities that would allow them to hone their business skills and produce results. We want them to succeed in that effort. • Many times our nonprofits are staffed by one to two people, making it

“The Foundation supports our agency by providing grants, nonprofit trainings, information about existing programs - which helps us avoid duplications – meetings to collaborate and positive encouragement.”

DEIDRE TATUM, *Executive Director, Walker County Community Action Agency*

hard to attend continuing education classes in Birmingham or Huntsville, so we bring the training to them. The Walker County Nonprofit Training Academy is a partnership between the Foundation and the nonprofits it serves. A volunteer committee of nonprofit and community leaders serve together to schedule training sessions that will most benefit the nonprofits of our area. Spread out over the course of the year, sessions include: Board Responsibilities and Development, Finance Management, Grant Writing, Marketing, Networking and Community Partnerships, Utilizing the Resources of the Web, and Social Media and Nonprofit Operation. • Deidre Tatum, Executive Director of the Walker County Community Action Agency, says, “At the training academy, I was provided good information on strategic planning that was a confirmation for our agency. I also gathered information on grants and how to apply for local funds. I met several other service providers and was able to form new partnerships for client referrals and for participation in our mass programs.”



Giving

Jonathan Holladay grew up the baby of six children in a single-parent household. His mom ran an in-home day care, so Jonathan grew up watching her operate a small business where customer service is essential. “You are dealing with the most valuable of possessions, someone’s kid. You have to build trust with them. I realize now that I learned a lot about being a small business owner from my mom, even though she never knew she was teaching me those lessons.” • Graduating from Walker in 1997, Jonathan spent the next 11 years acquiring an associate’s degree at Beville State Community College. He worked at Robinson’s Nursery during this time-deciding what he wanted to do in life. He never thought about being an insurance agent because he really wanted to go into law or psychology and be

“ I give because I can see a true servant’s heart in everyone involved with the Foundation. To know that I can be a small part of such great work in our community makes me glad to give.”

JONATHAN HOLLADAY, *Insurance Agent for Allstate*

a criminal profiler. He thought the badge and gun would be cool. • Instead, he began hanging out in the office of Russ Duggar, who was an Allstate agent and also his Sunday school teacher at the time. What started out as a way to kill time became a full-time job. Jonathan worked for Russ for almost 13 years before becoming an agent in 2011. “What I love about being an insurance agent is that I get to step in and help when people face their worst days. I like to think I bring a little bit of hope by having them in good hands.” • Jonathan is one of the Community Foundation’s most faithful donors. Even better, his employer, Allstate, adds 15% to each of his gifts through their matching gifts program. “I give to the Foundation because of the many great nonprofits they support. Not only is the Foundation a great facilitator of so many wonderful community events, but they also help with resources for so many of the nonprofits in our area.”



Results

Walker County residents have a strong sense of pride. At the same time, we acknowledge that we have long been plagued with negative attitudes and a negative public image. Walker County decided in 2016 to start telling its story in a way that promotes a positive image of the county, recognizes community assets and resources, and instills pride in the community. • Walker Area Community Foundation, along with the Chamber of Commerce of Walker County, Jasper Industrial Development Board, Walker County



“I see the yard signs all over Walker County, and it brings a great deal of pride to see, “WE CAN DO THAT” to us all embracing our new brand!”

JACKEY COLE, *City Clerk, Town of Nauvoo*

Economic Development Authority, and each of the municipalities in Walker County, initiated the project, which developed a new brand for Walker County. This brand, Walker County ... We Can Do That, sells a community that comes together to get things done, moving forward collaboratively and cooperatively. We are known for our can-do attitude. We consistently attract new industry, excel in sports and daily build better communities. • Having spent most of her adult life in civil service, Jackey Cole believes in our brand. “Walker County is a wonderful place to live and work, and the new brand shows our can-do attitude. Most people in our community will tell you that if you give a few Walker County residents a project, they will work tirelessly to the end, not only saying ‘We Can Do That,’ but yes, We Did That!” • Walker County isn’t about Cordova versus Dora or Jasper versus Sumiton. Not anymore. Walker County is about us working together toward a common vision. The Town of Nauvoo, where Jackey is the city clerk, feels it fits Walker County and Nauvoo perfectly.



Responsible

When John T. Oliver, Jr. started the foundation in 1995, his assistant, Sue Lett, really didn't know anything about foundations or nonprofits, except for the one that her church had sponsored for years. For Sue, it has been an amazing journey of working, learning and seeing the results that can be accomplished through responsible leadership and unprecedented giving by a small community. • Although we would like for Sue to work forever, she is ready to retire. In Debbie Daniel, we have found our new source of confidence. Debbie worked with John and Sue for years at First Bank of Jasper before John retired. She now serves the bank as Assistant Vice President and Executive Assistant to the President. • Debbie has always had an interest in the Foundation. While working with Mr. John T. Oliver, Jr. in the early 90s, she witnessed his research and desire to form a Community Foundation. "Mr. Oliver shared his vision with

"Because John T. Oliver, Jr. has always been a person of the highest integrity, as is this Foundation, it is important to us to make sure that remains intact by displaying the financials in a way that is transparent to all."

SUE LETT & DEBBIE DANIEL, *Accounting, Walker Area Community Foundation*

me and explained what he could see happening and how many people in Walker County could benefit by way of grants. His goal was to raise \$8 to \$10 million, which seemed like a fairy tale to me, but I still believed in him." • When Sue made the decision to retire, she discussed the position with Debbie. Even though Debbie has a full-time job that she loves, her heart was open to being a part of the Foundation on a part-time basis. While she knew of the Foundation prior to her arrival, she now has a better idea of what goes on throughout the week. "The staff members are constantly on the go – meeting with people, nonprofits, donors, organizations, other foundations – the list goes on and on! Whenever I sign a grant check, I always smile, knowing someone else is benefitting from the work this great Foundation is doing and continues to do on a daily basis."



Giving

Laura and David Ulz both grew up in the Midwest, where they lived and worked most of their lives. Upon retirement, they were drawn to the beauty and serenity of Lewis Smith Lake, where they enjoy the lake and many outdoor activities. • Since making the Jasper area their home in 2013, Laura and David have made some wonderful new friends. They attend Jasper First United Methodist Church, volunteer at a Winston County food pantry called Main Street Ministries and are members of Musgrove Country Club. Laura is active in the Arley Women’s Club, which leads many projects to improve the quality of life in the local area. • Laura and David have always shared a strong belief in serving others and giving back to the causes for which they care deeply, wherever their lives have taken them. The Foundation is one of the avenues they have chosen to support in their new home community. They

“ It is amazing how many worthy causes are funded each year by the Foundation. We realized that we could make an even bigger impact by giving to the Foundation and leveraging our resources across the community.”

LAURA AND DAVID ULZ, *Community Volunteers*

understand our reach and generosity, saying, “We are impressed the Foundation has a long-term vision for the future and has the best interests of the area in mind. It supports a broad range of nonprofits from basic needs of the community, education and the arts. We share the beliefs and vision of the families who built the Foundation and want to join in the challenge.” • They give because they want to make a difference in the lives of others. We are honored to partner with Laura and David, as there is plenty of need in Walker and Winston Counties, the places we both call home.



Results

Education has been in Jonathan Gilbert's DNA since birth. His mom is a teacher, and he followed in her footsteps. He taught at Walker High School for two years as the In-School Suspension Teacher and then as a 6th grade social studies teacher at Oakman Middle. In 2016, his principal approached him about a different sort of education for students, parents and the community at large. Jonathan was interested. • While Jonathan was educating students, SMART Student Health – through Melanie Ginn of Melanie Ginn and Associates – was educating this foundation and its Health Action Partners about the benefits of a school-based health solution dedicated to improving academic success. According to Ginn, "Health is both a cause and an effect of educational achievement. The Walker

"The Oakman Elementary School SMART Health and Wellness Center is so important because it focuses on the overall performance of the student by promoting a healthy academic and wellness lifestyle. In addition, this school-based clinic helps students' attendance, and as an educator at heart, I love that aspect."

JONATHAN GILBERT, *Outreach Coordinator*

County School System agreed. • The Oakman Elementary School SMART Health and Wellness Center was born, and so was a new position for Jonathan Gilbert. As the outreach coordinator for the clinic, it is Jonathan's job to promote the benefits of school-based health to the parents, community and pediatricians throughout Walker County. What could be a daunting task has been quite simple. More than 70% of parents have consented for their child to be seen by clinic officials, with more consent forms being turned in as children become ill. • The process is easy. Students go to the school nurse because they don't feel well. She assesses their level of illness, and if she thinks they are sick, as long as she has a consent form on file, opens her back door and has the nurse practitioner take a look at the student. Many times, the student goes home with a prescription and instructions for care.

\$16,980,608

Total grants directly invested in our community since inception

\$1,245,495

Total amount of grant distributions in 2016

\$24,066,137

Total amount of assets held

883

Number of gifts made to the Foundation in 2016

GRANT GROWTH OVER TIME

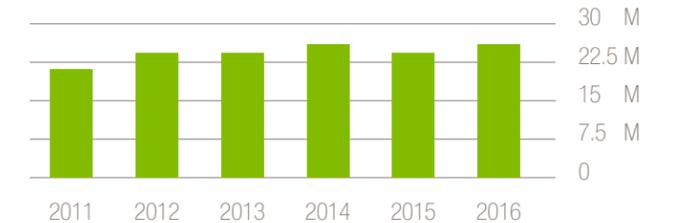
Total Grants Awarded: \$16,980,608

2011	1,190,071
2012	3,626,636
2013	3,073,770
2014	1,288,044
2015	1,015,748
2016	1,245,495



ASSET GROWTH OVER TIME

2011	22,328,994
2012	23,366,184
2013	23,976,770
2014	24,053,247
2015	23,650,638
2016	24,066,137



BALANCE SHEET

ASSETS (as of December 31, 2015)

Cash and Cash Equivalents	465,632
Investments	22,036,427
Other Assets	6,475
Pledges Receivable	
Property & Equipment, net	1,560,517
TOTAL ASSETS	24,069,051

LIABILITIES 2,914

NET ASSETS

Unrestricted	17,031,439
Temporarily Restricted	7,034,698

TOTAL NET ASSETS 24,066,137

TOTAL LIABILITIES & NET ASSETS 24,069,051

*Returns are calculated net of fees



2016 Chairman's Letter

To our donors:

I want to write about your Foundation. What it means to you and your community. Responsible, Giving, Results. Those words are our tag line. A tag line is something you want to be identified by and with. When people see it and read those words, we want them not only to think on the import of those words but to associate us with those words. • Your Foundation is responsible. It is responsible to you, our stakeholders. It is responsible in how it handles the money you have entrusted to us and how we invest it for not only grant-making, but sustainability. There is some financial information in this



WALKER AREA Community Foundation
RESPONSIBLE GIVING RESULTS

report, but if you really want a detailed analysis of our financial statement and the people who have so generously helped this Foundation, you can go to wacf.org/financials. Suffice it to

say, we are strong, in good shape and poised for the future. We plan to be here – for all people, for all time. • Your Foundation is giving. Since the Foundation's inception, it has grown from \$6 million to around \$25 million, all the while giving away nearly \$16 million. Do the math – that is \$41 million. That is not simply good, it is better than great – it is incredible. • Your Foundation gets results. We have a sophisticated grant review process that measures the results of the grants we make to assure we are not wasting your assets. Through our many initiatives, we are seeing solutions to problems facing our community every day. • Responsible Giving Results. Those are not just words. It is not just a tag line. Those words embody the essence of your Foundation. As the stories in this document report, your Foundation is strong and will only get stronger because collectively, we are Responsible, we are Giving, and we get Results.

Very truly yours,

Edward R. Jackson

