

AAAPP Corporate Funding Research

CASPER'S

Headquarters: Tampa, FL

EXECUTIVE LEADERSHIP

Blake Casper

Allison Casper Adams

Robby Adams

COMMUNITY GIVING: *ONLINE DONATION FORM*

Funding request available at <https://www.casperscompany.com/caspers-cares/donation-request/>. Funding opportunities mentioned are largely “in-kind” – spirit nights, McDonald’s vouchers for goodie bags, etc. Additionally, they list under their support their designation as a “ServSafe” test proctoring location (ServSafe is a food industry certification program).

DEX IMAGING

Headquarters: Tampa, FL

EXECUTIVE LEADERSHIP: NONE AVAILABLE ONLINE

COMMUNITY GIVING: From their site:

“Most companies weren’t formed to commit their profits back to the communities that help them prosper, but we were conceived with the mandate to do exactly that. Why?

Quite simply, we know that building a better place to live starts with each and every one of us. By making that commitment ourselves, we provide a powerful and enduring example that proves the power of philanthropy to create a better community for our customers, staff and facilities.

Together we’ve donated millions of dollars to charities, the arts, educational programs, entrepreneurial programs, children, mental health initiatives and those in crisis and in need, as well as music, sports and entertainment events that benefit the community at large.

Most importantly, your decision to do business with DEX is a vote to help the community where you live. With every page you print, we donate a third of our profits back to the programs that make your community safer, more fun, and better prepared for the future.”

No online information available regarding ways to submit funding requests or types of projects Dex usually funds.

DUKE ENERGY

Headquarters: Charlotte, NC

EXECUTIVE LEADERSHIP: ***ONLY NATIONAL LEADERSHIP POSITIONS WERE AVAILABLE ONLINE. ONLY LISTING FLORIDA-FOCUSED LEADERSHIP FOR BREVITY.*

Douglas F Esamann EVP, Energy Solutions and President, Midwest and Florida Regions

Catherine S. Stempien State President - Florida

Board of Directors

Michael G. Browning Chairman

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Theodore F. Craver Jr.

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Nicholas C. Franadakis

Lynn J. Good

John T. Herron

William E. Kennard

E. Marie McKee

Marya M. Rose

Carlos A. Saladrigas

Thomas E. Skains

Charles W. Moorman IV

William E. Webster, Jr.

COMMUNITY GIVING:

Duke Energy does provide grants, however these have been previously reviewed and AAAPP does not qualify based on their focus areas of K-12 education, workforce, nature, or other areas by invitation only.

Duke Energy does run an Energy Assistance program, where individuals in need of assistance can call resources listed through their Energy Neighbor Fund. Duke requests donations from community members for this program. The current listings for Pinellas & Pasco are as follows:

County	Organization	Phone Number
Pasco	Neighborhood Care Center – Zephyrhills	813-780-6822
Pasco	Pasco County Social Services	352-521-4274
Pasco	Salvation Army – West Pasco	727-847-6321
Pasco	St. James Catholic Church	727-862-8580
Pasco	St. Vincent DePaul – Our Lady Queen of Peace Church	727-845-4955
Pinellas	Salvation Army of St. Pete	727-821-9123 or 727-822-4954
Pinellas	Religious Community Services	727-446-5964 x214

It is unclear if Duke grants out funds to these organizations, or if the funds are simply by donation from community members.

Franklin Templeton

Headquarters: San Mateo, CA

EXECUTIVE LEADERSHIP

Gregory E. Johnson Chairman of the Board and Chief Executive Officer

Rupert H. Johnson, Jr. Vice Chairman

Peter K. Barker Retired California Chairman

Mariann Byerwalter Chairman of the Board

Charles E. Johnson Founder and Managing Member

Mark C. Pigott Executive Chairman

Laura Stein VP – General Counsel & Corporate Affairs

Seth H. Waugh Chief Executive Officer

Geoffrey Y. Yang Managing Director and Founding Partner

EXECUTIVE OFFICERS

Gregory E. Johnson Chairman of the Board and Chief Executive Officer

Rupert H. Johnson Jr. Vice Chairman

Jennifer M. Johnson President and Chief Operating Officer

Matthew Nicholls Executive Vice President, Chief Financial Officer

Craig S. Tyle Executive Vice President General Counsel and Secretary

Jed A. Plafker Executive Vice President

Gwen L. Shaneyfelt Chief Accounting Officer

Alok Sethi Executive Officer

COMMUNITY GIVING:

FRANKLIN TEMPLETON OPERATES A SEPARATE FOUNDATION WITH THE FOLLOWING FOCUS AREAS:

- Science & The Big Questions
- Character Virtue Development (mainly geared towards youth)
- Individual Freedom & Free Markets (largely international projects)
- Exceptional Cognitive Talent & Genius
- Genetics
- Voluntary Family Planning

Funding request begins with a letter of inquiry, which is on a rolling deadline. Any organization may request funding but funds are only granted through the focus areas.

Jabil

Headquarters: St. Petersburg, FL

Executive Leadership

Tim L. Main Chairman of the Board of Directors

Thomas A. Sansone Vice Chairman of the Board of Directors

Mark T. Mondello Director

Martha F. Brooks Director

Christopher S. Holland Director

Steven A. Raymund Director

David M. Stout Director

Anousheh Ansari Director

John Plant Director

Executive Officers

Mark T. Mondello Chief Executive Officer

Steve Borges EVP and CEO, Healthcare

Michael J. Loparco EVP and CEO, Engineered Solutions Group

Alessandro Parimbelli EVP and CEO, Enterprise and Infrastructure

Kenny Wilson EVP and CEO, Jabil Green Point

Brenda Chamula CEO, Jabil Packaging Solutions

Sergio A. Cadavid SVP, Treasurer

Bruce A. Johnson SVP, Chief Human Resources Officer

Daryn Smith SVP, Enterprise and Controller

COMMUNITY GIVING

All Jabil locations are “empowered to implement a localized strategy that provides opportunities to invest in their communities around causes related to Education, Empowerment, and the Environment.” These local strategies may include employee volunteerism, government partnerships, and/or philanthropic initiatives.

- Education: providing students, from early education to universities, the tools and resources necessary to promote opportunities in STEM fields.
- Empowerment: Jabil believes in empowering others to help improve their lives and overcome challenges. Among the many global endeavors to empower others, our employees are providing meals to the homeless, helping local orphanages, building homes for low income families, and mentoring students to achieve their greatest potential.
- Environment: includes reforestation efforts, recycling programs, and the beautification of our local communities – neighborhood cleanups, tree plantings, bike to work, etc.

AAAPP may consider the “empowerment” focus area as a potential connection point with Jabil employees. No online donation forms are available on the Jabil website.

Publix

Headquarters: Lakeland, FL

EXECUTIVE LEADERSHIP: NONE AVAILABLE ONLINE

COMMUNITY GIVING:

Publix implements a variety of community giving opportunities:

- [Publix Community Giving](#): Donations of food, gift cards, sponsorships, giveaways and program ads. Must be focused toward youth, education, reducing hunger, and alleviating homelessness.
- [Marketing Sponsorships](#) – these are largely to be paid sponsorships for promotional value at largescale events (i.e., marathons, festivals, etc)
- [Publix Charities Giving](#): These seem to be the more focused grant applications, with the same focus areas of youth, education, reducing hunger, and alleviating homelessness.
 - From the Publix website: In 2019, all requests related to **hunger relief programs** must be submitted **April 1 through May 31** for a fall decision and announcement. All requests related to **housing and shelter programs** must be submitted during **June 15 through August 15** for a decision and announcement near the end of the year. Requests for these programs will not be considered at any other time.

Other than the timeline for Publix Charities, Publix accepts support requests on a rolling basis and requires 4 – 8 week lead time to provide an answer to applicant organization.

Raymond James

Headquarters: St. Petersburg, FL

Executive Leadership

EXECUTIVE COMMITTEE

Paul Reilly
Bella Loykhter Allaire
Paul Allison
James E. Bunn
John Carson Jr.
Scott Curtis
Jeff Dowdle
Tash Elwyn
Jeffrey P. Julien
Jodi Perry
Steven M. Raney
Jonathan N. Santelli
Jeffrey E. Trocin

OPERATING COMMITTEE

Jennifer Ackart
Chris Aisenbrey
Haig Ariyan
Emma Bredin
Tracey Bustamante
Erik Fruland
Tarek Helal
Kim Jenson
Heather Knable
Chris Majeski
Robert Miller
Greg Rust
Paul Shoukry
Jim Sickling
Amanda Stevens
Scott Zebra
Andy Zolper

EXECUTIVE LEADERSHIP

Thomas A. James Chairman Emeritus *Raymond James Financial*
Vin Campagnoli Chief Information Officer *Raymond James Financial*
George Catanese Chief Risk Officer *Raymond James Financial*
Stan Duncan Chief Human Resources Officer *Raymond James Financial*
Thom Tremaine EVP, Chief Operations Officer *Raymond James Financial*
Mike White Chief Marketing Officer *Raymond James Financial*

COMMUNITY GIVING:

- Raymond James hosts “Raymond James Cares Month” annually, where employees have the opportunity to support a variety of local volunteer initiatives. In 2019, the month was in May, but it is unclear if every year it is the same.
- The website states that in 2018, between Raymond James corporate and associates and advisors, more than \$56.4 million was donated to charitable organizations, including:
 - nearly \$6.25 million to the United Way and its partner agencies through the corporate match program.
 - Through sponsorship – Raymond James Stadium, American Stage – Raymond James Theatre, etc.
- Other giving opportunities are largely associate/advisor-led. A sample of these included projects with American Heart Association, financial literacy through a variety of organizations, Habitat for Humanity, Disaster Relief, and associate-led charity funds.

No online information is available regarding requests for support. For AAAPP to connect with Raymond James, a personal connection with an advisor or associate seems to be the most viable avenue.

Sabal Trust

Headquarters: Tampa, FL

Executive Leadership

Kathleen J. Belmonte
Travis Brown
Lucas Devicente
Kimberly A. Early
Laurence R. Fasan
Jennifer Garbowicz
Erik Gronvold
Susan H. Hines
Bryant N. Jones
Charles Kard

Rachel Knight
Elizabeth J. Knowles
Ronald e. Koepsel
Gerard J. Lachnicht
Susan S. Mittermayr
G. Lowe Morrison
Andre Nacaxe
Scott L. Pieper
Brent L. Prudhomme
Tom Wright

COMMUNITY GIVING:

Many of the leadership team members had involvement in local organizations listed within their bios. The listing below is the only information provided on community giving, so it seems Sabal Trust largely directs its funds for community giving towards organizations and projects of interest to its employees.

From the Sabal Trust website:

Over the past several years, Sabal Trust has committed a significant portion of revenues to support the following entities:

All Children's Hospital Foundation
American Cancer Society
American Stage
Asolo Repertory Theater
Boy Scouts of America
Buffalo Scholarship Foundation
CASA
Children's Dream Fund
Forty Carrots Family Center
Habitat for Humanity of Lake-Sumter
Hillsborough County Bar Association
Hospice
Menorah Manor
Mote Marine Laboratory
New College Foundation
Police Athletic League
Ringling College
Rotary
Salvador Dali Museum

Salvation Army
SPCA of Tampa Bay
St. Anthony's Hospital Auxiliary
St. Joseph's Hospital
St. Petersburg Bar Foundation
St. Petersburg College Foundation – Palladium
St. Petersburg Free Clinic
Stuart Society of the Museum of Fine Arts
Tampa Bay Estate Planning Council
Tampa Bay Performing Arts Center
Tampa Bay Watch
Tampa Museum of Art
Temple Beth-El
The Chiselers
University of Central Florida
Villages Regional Hospital Auxiliary Foundation
Westcoast Black Theatre Troupe
YMCA

Tech Data

Headquarters: Clearwater, FL

Executive Leadership

Rich Hume, CEO

Charles V. Dannewitz

Beth E. Simonetti

John Tonnison

David R. Vetter

Board of Directors

Mr. Bob Dutkowsky

Karen Dahut

Harry J. Harczak Jr.

Bridgette Heller

Richard T. Hume

Kathleen Misuans

Thomas Morgan

Patrick Sayer

Savio W. Tung

COMMUNITY GIVING:

The Tech Data site lists the following avenues for community outreach:

- Charitable giving and in-kind donations to non profit organizations
 - Four pillars of focus:
 - Children
 - Education
 - Wellness
 - Colleague-driven initiatives
- Colleague volunteerism
- Involvement in civic and local/regional economic development organizations
- Partnerships with cultural organizations

Some community partners listed on the Tech Data site include:

- Academy Prep
- American Cancer Society
- American Heart Association
- Big Brothers Big Sisters
- Boys & Girls Clubs
- Children Dream Fund
- Equality Florida Institute
- JDRF
- Make a Wish
- Moffitt Cancer Center
- Special Olympics
- United Way

This seems to be another corporation where connecting with employees could lead to larger corporation involvement.

Wallace, Welch & Willingham Insurance

Headquarters: St. Petersburg, FL

Executive Leadership: NONE LISTED ON WEBSITE

COMMUNITY GIVING

The webpage for community giving lists volunteerism at a variety of local organizations as well as a company-wide Community Involvement Committee that selects and supports nonprofit causes while encouraging a spirit of agency volunteerism as the two main avenues for W3 employees to participate in community support.

It should be noted that Wallace, Welch & Willingham has been a longtime supporter of the AAAPP's Annual Luncheon through sponsorship.

GFS Private Wealth/Mainsail Family Trust (both entities now a part of Mercer Global Advisors)

Headquarters: Clearwater, FL

Executive Leadership:

For this company, local employees are being listed instead of organization-wide executive leadership.

Devin Farrow, *Regional VP*

Greg Willsey, *Client Advisor and Branch Manager*

Susan Crawford Pilon, *Client Advisor*

Melissa Pinkerton, *Client Advisor*

Client Associates:

Adela Africano

Jessica Duxstad

Cary Shaw

Tiffany Stokes

COMMUNITY GIVING

No information provided.

ProVise Management

Headquarters: Clearwater, FL

Executive Leadership:

Raymond Ferrara, CEO

Greg Willsey, *Client Advisor and Branch Manager*

Susan Crawford Pilon, *Client Advisor*

Melissa Pinkerton, *Client Advisor*

Client Associates:

Adela Africano

Jessica Duxstad

Cary Shaw

Tiffany Stokes

COMMUNITY GIVING:

FROM THEIR WEBSITE:

“Sharing our time, talent and treasure with the communities we serve is an important part of who we are as individuals and a company.”

Ray Ferrara, CFP®, ProVise Management Group, Chair, CEO & Chief Compliance Officer

While we help our clients plan for their future, many others struggle with their future. We are committed to improving our communities through our team volunteerism, corporate sponsorships, and individual charitable giving.

Pictures include support of Komen, American Cancer Society, Morton Plant Mease Foundation, Tampa Bay Lightning, Homeless Emergency Project, Directions for Living, and the Clearwater Chamber of Commerce. Most includes support through events (5K Races, Special Events, etc).