

# Southwest Florida Fossil Society Inc



## SUMMARY

### Mission

The purpose of the Southwest Florida Fossil Society ,Inc. is to promote and foster the science of paleontology through the collection, identification and preservation of fossil remains and provide a regional forum for education, training and experience in the scientific field.

### Contact Information

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<b>Email</b>	
<b>Website</b>	<a href="http://southwestfloridafossilsociety.org">southwestfloridafossilsociety.org</a>
<b>Facebook</b>	Southwest-Florida-Fossil-Society-271052149712364/

### General Information

<b>Nonprofit</b>	Southwest Florida Fossil Society Inc
<b>Tax Exempt Status</b>	Public Supported Charity
<b>Incorporation Year</b>	2014
<b>State Charitable Solicitations Permit</b>	Yes Aug 2017
<b>State Registration</b>	Yes Nov 2016

# BACKGROUND & NEEDS

## Impact Statement

2016 Accomplishments:

1. Presented a paleontological abstract at the Southeastern Geological Society of America, a professional national geological organization.
2. Promoted the study of professional paleontology by granting two graduate student scholarships for the University of Florida in Gainesville, Florida. (on-going, annual contribution)
3. Participating in the Giving Challenge to promote our organization and provide a better internal understanding of what is needed to continue to grow and thrive as an educational and scientific organization. This will allow our society to become a better non-profit organization to serve our community.

## Needs Statement

Scholarship fund - we give two (2) scholarships every year one in vertebrae paleontology, and one in invertebrae paleontology to deserving grad students in paleontology university of Florida Gainesville since 1997 it has been \$500 we would like to raise the amount of each to \$1,000 and have a reserve to maintain and build on for the future this fund is separate from the grant fund and operating account and is ongoing. Grant fund - to build up this fund to help publish a scientific book authored by the society, or sponsor a scientific publication the museum in Gainesville Florida may publish, or a larger donation to a related interest or research (shark tagging research) this fund is a growth fund till the amount is over \$5,000 to be meaningful and substantial, not meant to be awarded every year. This fund is separate from the scholarship fund and operating account and ongoing. Square one point of sale for credit cards includes stand, i pad, chip reader, software to help maintain inventory books, shirts, rikers, dues, merchandise. \$500 donations distributed equally to each account unless stated differently .

## Background Statement

The membership of the Southwest Florida Fossil Society [SFFS] is comprised of fossil enthusiasts across Florida, other U.S. states, Canada and Europe, and includes professional paleontologists, geologists and museum curators. Our purpose is to promote and foster the science of paleontology through the collection, identification and preservation of fossil remains. We provide a regional forum for education, training and experience in paleontology in a fun, family-learning atmosphere. We meet the second Saturday of every month at 118 Sullivan St., Punta Gorda, Florida. At each meeting, a professional or highly qualified avocational paleontologist gives a lecture, slide show, or update on current research. Other activities include monthly field trips, raffles, and participation in regional education and outreach events such as National Fossil Day, among others.

### OUR HISTORY

In 1983, Mitchell Hope and Bill and Lelia Brayfield formed the Southwest Florida Chapter of the Paleontological Society. Within that first year, the name was changed to the Southwest Florida Fossil Club. The Brayfields lived in El Jobean in Charlotte County, Florida, where (with assistance from the Royal Ontario Museum) they built a facility called the "Brayfield Research Lab" on the back of their property. The lab was wall-to-wall with fossils that were collected locally.

In 1997, we initiated a scholarship fund with two scholarships awarded to graduate students in paleontology at the University of Florida/Florida Museum of Natural History. We also started a grant funded by a portion of society dues; the society's grant committee starts meeting during the summer to decide on the awards. The society supports the science of paleontology and related interests, and continues to expand its outreach and educational programs to provide inspiration for the public, and to build mutually beneficial partnerships with other fossil organizations. With the FOSSIL project now giving us [the FOSSIL community] the tools to better our outreach and educational materials, the future is bright. Our membership is currently 220 and growing. We are utilizing all opportunities to make our organization a success.

In 2014 the Southwest Florida Fossil Society incorporated as a not for profit organization under 501 (c). This

allows us to continue our mission of fossil education within our surrounding communities.

## Statement from the Board Chair

## Statement from the CEO/Executive Director

## Areas Served

FL

FL- Charlotte

FL- DeSoto

FL- Lee

FL- Sarasota

We have members primarily from Charlotte, Sarasota, Desoto , lee, county Florida but not limited to other parts of Florida and other countries 200+ members we meet monthly in Punta Gorda, Florida have guest speakers to give presentation on paleontology and research, we have a youth zone for kids of all ages with literature geared to inspire youth in the science of paleontology youth are the future.

## Service Categories

**Primary Organization Type**

Science & Technology

# PROGRAMS

## Outreach

<b>Description</b>	Our outreach consist of talks to other organizations (schools, scout troops, etc.) that have an interest in Florida fossil history. Our goal is to inspire these groups (with a particular focus on youth and families) to become interested and pursue that interest in Florida's fossil history. Our outreaches use static displays, fossil giveaways and grab bags for kids as additional items of interest to take home and continue fossil their studies. We also use STEM [Science, Technology, Engineering, Math] tools for outreach sessions to continue to grow society membership for the future.
<b>Budget</b>	\$200.00
<b>Category</b>	Science & Technology, General/Other Science & Technology, General/Other
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	K-12 (5-19 years) Adults Families
<b>Short Term Success</b>	Changes were made to talk to youth with there parents present to inspire the parents also the parents bring the youth to society meetings and then it turns into a family affair learning together. Outreach could be Girl Scouts, Boy Scouts, other organizations who want an interesting talk on megalodon sharks and Florida fossil history, technology has been a distraction to get youth interested in the sciences, smartphone video games.We are constantly evolving our program to attract youth engage their participation.
<b>Long Term Success</b>	Long term success is achieved when we see new members at meetings join the society as a direct result from outreach talks given, also if the outreach talk inspires youth to pursue any interest in the science and we had some influence on that youths career choice. Outreach is always a continuing and ongoing program to reach all groups of any age but to focus on youth and family as much as possible .youth are the future of paleontology.
<b>Program Success Monitoring</b>	We ask how new members heard about the society to gauge all outreach.
<b>Program Success Examples</b>	After the presentation, if they attend a meeting and join the society as a member. Asking all new members at meetings to introduce themselves and tell what fossil interest they have and how they heard about the society. We have seen more new membership talking to youth with the parents, also the introduction of the society youth zone is helping.

# MANAGEMENT

## CEO/Executive Director

<b>CEO/Executive Director</b>	No Executive Director
<b>CEO Email</b>	N/A

## Staff & Volunteer Statistics

<b>Full Time Staff</b>	0
<b>Part Time Staff</b>	0
<b>Staff Retention Rate %</b>	N/A
<b>Professional Development</b>	No
<b>Contractors</b>	0
<b>Volunteers</b>	240
<b>Management Reports to Board</b>	
<b>CEO/Executive Director Formal Evaluation</b>	N/A
<b>Senior Management Formal Evaluation</b>	N/A
<b>NonManagement Formal Evaluation</b>	No

## Collaborations

The Aurora Museum (also an educational not for profit organization):  
Support and volunteer with the Aurora Fossil museum in Aurora, North Carolina. Cynthia Crane is the executive director of the museum.

Also collaborate with another not for profit organization, "Friends of the Aurora Fossil Museum. This is a fossil support club for the Aurora Fossil Museum. Current president is Lee Cone.

The collaboration between the Southwest Florida Fossil Society and both of the Aurora organizations has been ongoing for over eleven years, due to a shared interest in North American paleontology.

# GOVERNANCE

## Board Chair

<b>Board Chair</b>	chuck ferrara
<b>Company Affiliation</b>	Dex Imaging
<b>Board Term</b>	Jan 2016 to Dec 2018
<b>Board Chair Email</b>	ferrara_307@hotmail.com

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Jim Davis	UPS	Voting
Chuck Ferrara	dex imaging	NonVoting
Mike Koslowski	Community Volunteer	Voting
Jay Lev	Retired	Voting
Leslie Newberry	Community Volunteer	
Beth Shively	Retired	Voting
Scott Tucker	Contracter	Voting
Roxane Wilson	suntrust	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	8
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	5
<b>Female</b>	3
<b>Not Specified</b>	0

## Governance

<b>Board Term Lengths</b>	2
<b>Board Term Limits</b>	99
<b>Board Orientation</b>	Yes
<b>Number of Full Board Meetings Annually</b>	4
<b>Board Meeting Attendance %</b>	81
<b>Board Self-Evaluation</b>	Yes

<b>Written Board Selection Criteria</b>	No
<b>Percentage of Board Making Monetary Contributions</b>	4
<b>Percentage of Board Making In-Kind Contributions</b>	7
<b>Constituency Includes Client Representation</b>	No

## Standing Committees

Youth

# FINANCIALS

## Current Financial Info

<b>Fiscal Year Begins</b>	2016
<b>Fiscal Year Ends</b>	2016
<b>Projected Revenue</b>	\$14,000.00
<b>Projected Expenses</b>	\$11,000.00
<b>Total Projected Revenue includes "in-kind" contributions/ donations</b>	
<b>Endowment Value</b>	\$0.00
<b>Spending Policy Percentage</b>	0

## Capital Campaign

<b>In a Capital Campaign</b>	No
<b>Campaign Goal</b>	0

## IRS Form 990s

2015 990N

2014 990N

## Audit/Financial Documents

2015 Financials

2014 Financials

## Solvency

### Short Term Solvency

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Current Ratio: Current Assets/Current Liabilities</b>	7.20	6.20	--

### Long Term Solvency

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Long-Term Liabilities/Total Assets</b>	0%	0%	--

## Historical Financial Review

### Revenue and Expenses

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Total Revenue</b>	\$10,171	\$5,770	--
<b>Total Expenses</b>	\$8,549	\$7,038	--

### Revenue Sources



Fiscal Year	2015	2014	2013
<b>Foundation and Corporation Contributions</b>	\$0	\$0	--
<b>Government Contributions</b>	\$0	\$0	\$0
<b>Federal</b>	\$0	\$0	
<b>State</b>	\$0	\$0	
<b>Local</b>	\$0	\$0	
<b>Unspecified</b>	\$0	\$0	
<b>Individual Contributions</b>	\$360	\$320	--
<b>Indirect Public Support</b>	\$0	\$0	--
<b>Earned Revenue</b>	\$8,371	\$4,170	--
<b>Investment Income, Net of Losses</b>	\$0	\$0	--
<b>Membership Dues</b>	\$1,440	\$1,280	--
<b>Special Events</b>	\$0	\$0	--
<b>Revenue In-Kind</b>	\$0	\$0	--
<b>Other</b>	\$0	\$0	--

#### Expense Allocation

Fiscal Year	2015	2014	2013
<b>Program Expense</b>	\$1,425	\$1,495	--
<b>Administration Expense</b>	\$7,124	\$5,543	--
<b>Fundraising Expense</b>	\$0	\$0	--
<b>Payments to Affiliates</b>	\$0	\$0	--
<b>Total Revenue/Total Expenses</b>	1.19	0.82	--
<b>Program Expense/Total Expenses</b>	17%	21%	--
<b>Fundraising Expense/Contributed Revenue</b>	0%	0%	--

#### Assets and Liabilities

Fiscal Year	2015	2014	2013
<b>Total Assets</b>	\$10,865	\$9,217	--
<b>Current Assets</b>	\$9,965	\$8,407	--
<b>Long-Term Liabilities</b>	\$0	\$0	--
<b>Current Liabilities</b>	\$1,384	\$1,357	--
<b>Total Net Assets</b>	\$9,481	\$7,860	--

#### Top Funding Sources

Fiscal Year	2015	2014	2013
<b>Top Funding Source &amp; Dollar Amount</b>	Sales \$8,371	Sales \$4,170	--
<b>Second Highest Funding Source &amp; Dollar Amount</b>	Membership Dues \$1,440	Membership Dues \$1,280	--
<b>Third Highest Funding Source &amp; Dollar Amount</b>	Contributions, gifts, grants \$360	Contributions, gifts, grants \$320	--

## Comments

### Financial Comments by Organization

Our biggest challenge as a small non-profit organization has been to provide the funding necessary to cover the expenses for our events throughout each year. One of our goals in participating in the giving challenge is to be able to establish reserves in our existing funds (grants, scholarship, operating) to plan for additional events and increase our scholarship and outreach programs with a focus on inspiring the study of sciences within our community youth.

### Financial Comments by Foundation

Financial information taken from unaudited compilations as the organization files a 990-N. Contributions may include foundation and corporate support as they are not separately stated in the compilations.

# PLANS, POLICIES & LICENSES

## Plans

<b>Fundraising Plan</b>	Under Development
<b>Communication Plan</b>	Under Development
<b>Strategic Plan</b>	No
<b>Management Succession Plan</b>	Under Development
<b>Continuity of Operations Plan</b>	Under Development

## Policies

<b>Organizational Policies and Procedures</b>	Under Development
<b>Written Conflict of Interest Policy</b>	Under Development
<b>Nondiscrimination Policy</b>	Under Development
<b>Directors and Officers Insurance Policy</b>	No
<b>Whistle Blower Policy</b>	No
<b>Document Destruction Policy</b>	No

## Government Licenses

**Is your organization licensed by the Government?** No

## Planning & Policies Comments

### **Planning & Policies Comments by Organization**

Our two major annual fundraisers for the fossil society are a fossil auction in February and a fossil exposition in November renting table space to vendors open to the public to purchase fossil items. All funds raised are divided between our three accounts: Scholarships, Grant, Operations. We are a small not for profit organization - all of our board positions are volunteer only.

### **Planning & Policies Comments by Foundation**