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Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**  
**or Section 4947(a)(1) Nonexempt Charitable Trust**  
**Treated as a Private Foundation**

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

**2009**For calendar year **2009**, or tax year beginning , 2009, and ending , 20G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

|  |  |   |  |
|--|--|---|--|
| <b>Use the IRS label. Otherwise, print or type. See Specific Instructions.</b>   | Name of foundation<br><b>The Blue Foundation for a Healthy Florida Inc</b>       |   | <b>A Employer identification number</b><br><b>59-3707820</b>                       |
|  | Number and street (or P O box number if mail is not delivered to street address) | Room/suite  | <b>B Telephone number (see page 10 of the instructions)</b><br><b>904-905-6803</b> |
|  | City or town, state, and ZIP code<br><b>Jacksonville, FL 32246</b>               |   |  |
|  |  |   |  |
| <b>H Check type of organization:</b> <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |  |   |  |
| <b>I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$</b><br><b>73,339,005</b>  |  | <b>J Accounting method:</b> <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis) |  |
| <b>C If exemption application is pending, check here ▶ <input type="checkbox"/></b>  |  |   |  |
| <b>D 1. Foreign organizations, check here ▶ <input type="checkbox"/></b><br><b>2. Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/></b>   |  |   |  |
| <b>E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ <input type="checkbox"/></b>   |  |   |  |
| <b>F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/></b>  |  |   |  |

| <b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions).) |   | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|---|------------------------------------|---------------------------|-------------------------|---|
| <b>Revenue</b>  | 1 Contributions, gifts, grants, etc., received (attach schedule)                    | 10,062,350                         |                           |                         |   |
|   | 2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B |                                    |                           |                         |   |
|   | 3 Interest on savings and temporary cash investments                                | 9,273                              | 9,273                     |                         |   |
|   | 4 Dividends and interest from securities  | 2,269,680                          | 2,269,680                 |                         |   |
|   | 5a Gross rents  |                                    |                           |                         |   |
|   | b Net rental income or (loss)   |                                    |                           |                         |   |
|   | 6a Net gain or (loss) from sale of assets not on line 10                            | 9,571                              |                           |                         |   |
|   | b Gross sales price for all assets on line 6a                                       | 9,818,821                          |                           |                         |   |
|   | 7 Capital gain net income (from Part IV, line 2)                                    |                                    | 1,381,661                 |                         |   |
|   | 8 Net short-term capital gain   |                                    |                           |                         |   |
|   | 9 Income modifications  |                                    |                           |                         |   |
|   | 10a Gross sales less returns and allowances   |                                    |                           |                         |   |
| b Less. Cost of goods sold  |   |                                    |                           |                         |   |
| c Gross profit or (loss) (attach schedule)  |   |                                    |                           |                         |   |
| 11 Other income (attach schedule)   |   |                                    |                           |                         |   |
| 12 <b>Total. Add lines 1 through 11</b>   | 12,350,874  | 3,660,614                          |                           |                         |   |
| <b>Operating and Administrative Expenses</b>  | 13 Compensation of officers, directors, trustees, etc.                              |                                    |                           |                         |   |
|   | 14 Other employee salaries and wages  |                                    |                           |                         |   |
|   | 15 Pension plans, employee benefits   |                                    |                           |                         |   |
|   | 16a Legal fees (attach schedule)  |                                    |                           |                         |   |
|   | b Accounting fees (attach schedule)   | 14,520                             |                           |                         | 13,980  |
|   | c Other professional fees (attach schedule)   | 711,588                            |                           |                         | 604,330   |
|   | 17 Interest   |                                    |                           |                         |   |
|   | 18 Taxes (attach schedule) (see page 14 of the instructions)                        | 51,326                             |                           |                         | 0   |
|   | 19 Depreciation (attach schedule) and depletion                                     |                                    |                           |                         |   |
|   | 20 Occupancy  |                                    |                           |                         |   |
|   | 21 Travel, conferences, and meetings  | 83,653                             |                           |                         | 64,435  |
|   | 22 Printing and publications  | 2,877                              |                           |                         | 2,705   |
|   | 23 Other expenses (attach schedule)   | 45,036                             |                           |                         | 86,807  |
|   | 24 <b>Total operating and administrative expenses. Add lines 13 through 23</b>      | 909,000                            | 0                         |                         | 772,257   |
|   | 25 Contributions, gifts, grants paid  | 2,438,988                          |                           |                         | 2,888,644   |
| 26 <b>Total expenses and disbursements. Add lines 24 and 25</b>   | 3,347,988   | 0                                  |                           | 3,660,901               |   |
| 27 Subtract line 26 from line 12:   |   |                                    |                           |                         |   |
| a <b>Excess of revenue over expenses and disbursements</b>  | 9,002,886   |                                    |                           |                         |   |
| b <b>Net investment income</b> (if negative, enter -0-)   |   | 3,660,614                          |                           |                         |   |
| c <b>Adjusted net income</b> (if negative, enter -0-)   |   |                                    |                           |                         |   |

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Cat No 11289X

Form **990-PF** (2009)

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| <b>Part II Balance Sheets</b>  |   | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) |                | Beginning of year     | End of year |  |
|--|---|--|----------------|-----------------------|-------------|--|
|  |   | (a) Book Value   | (b) Book Value | (c) Fair Market Value |             |  |
| <b>Assets</b>  | <b>1</b> Cash—non-interest-bearing . . . . .  | 4,031,806  | 4,890,740      | 4,890,740             |             |  |
|  | <b>2</b> Savings and temporary cash investments . . . . .   |  |                |                       |             |  |
|  | <b>3</b> Accounts receivable ▶  |  |                |                       |             |  |
|  | Less: allowance for doubtful accounts ▶   |  |                |                       |             |  |
|  | <b>4</b> Pledges receivable ▶   |  |                |                       |             |  |
|  | Less: allowance for doubtful accounts ▶   |  |                |                       |             |  |
|  | <b>5</b> Grants receivable . . . . .  |  | 187,500        | 187,500               |             |  |
|  | <b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions) . . . . . |  |                |                       |             |  |
|  | <b>7</b> Other notes and loans receivable (attach schedule) ▶   |  |                |                       |             |  |
|  | Less: allowance for doubtful accounts ▶   |  |                |                       |             |  |
|  | <b>8</b> Inventories for sale or use . . . . .  |  |                |                       |             |  |
|  | <b>9</b> Prepaid expenses and deferred charges . . . . .  |  |                |                       |             |  |
|  | <b>10a</b> Investments—U.S. and state government obligations (attach schedule)  |  |                |                       |             |  |
|  | <b>b</b> Investments—corporate stock (attach schedule) . . . . .  |  |                |                       |             |  |
|  | <b>c</b> Investments—corporate bonds (attach schedule) . . . . .  |  |                |                       |             |  |
|  | <b>11</b> Investments—land, buildings, and equipment: basis ▶   |  |                |                       |             |  |
| Less: accumulated depreciation (attach schedule) ▶   |   |  |                |                       |             |  |
| <b>12</b> Investments—mortgage loans . . . . .   |   |  |                |                       |             |  |
| <b>13</b> Investments—other (attach schedule) <i>pg. 21</i> . . . . .  | 60,798,579  | 68,454,854   | 68,082,027     |                       |             |  |
| <b>14</b> Land, buildings, and equipment: basis ▶ <i>49,234</i>  |   |  |                |                       |             |  |
| Less: accumulated depreciation (attach schedule) ▶ <i>pg. 21</i> <i>8,206</i>  | 49,234  | 41,028   | 41,028         |                       |             |  |
| <b>15</b> Other assets (describe ▶ <i>Dividend Receivable</i> )  | 141,354   | 137,710  | 137,710        |                       |             |  |
| <b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . . | 65,020,973  | 73,711,832   | 73,339,005     |                       |             |  |
| <b>Liabilities</b>   | <b>17</b> Accounts payable and accrued expenses . . . . .   | 49,247   | 106,879        |                       |             |  |
|  | <b>18</b> Grants payable . . . . .  | 2,550,916  | 2,181,261      |                       |             |  |
|  | <b>19</b> Deferred revenue . . . . .  |  |                |                       |             |  |
|  | <b>20</b> Loans from officers, directors, trustees, and other disqualified persons  |  |                |                       |             |  |
|  | <b>21</b> Mortgages and other notes payable (attach schedule) . . . . .   |  |                |                       |             |  |
|  | <b>22</b> Other liabilities (describe ▶ )   |  |                |                       |             |  |
| <b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .   | 2,600,163   | 2,288,140  |                |                       |             |  |
| <b>Net Assets or Fund Balances</b>   | <b>Foundations that follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>    |  |                |                       |             |  |
|  | <b>24</b> Unrestricted . . . . .  | 48,420,810   | 57,214,130     |                       |             |  |
|  | <b>25</b> Temporarily restricted . . . . .  |  | 209,562        |                       |             |  |
|  | <b>26</b> Permanently restricted . . . . .  | 14,000,000   | 14,000,000     |                       |             |  |
|  | <b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>                            |  |                |                       |             |  |
|  | <b>27</b> Capital stock, trust principal, or current funds . . . . .  |  |                |                       |             |  |
|  | <b>28</b> Paid-in or capital surplus, or land, bldg., and equipment fund  |  |                |                       |             |  |
|  | <b>29</b> Retained earnings, accumulated income, endowment, or other funds  |  |                |                       |             |  |
|  | <b>30</b> <b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .  | 62,420,810   | 71,423,692     |                       |             |  |
|  | <b>31</b> <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .   | 65,020,973   | 73,711,832     |                       |             |  |

**Part III Analysis of Changes in Net Assets or Fund Balances**

|   |          |            |
|---|----------|------------|
| <b>1</b> Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . . | <b>1</b> | 62,420,810 |
| <b>2</b> Enter amount from Part I, line 27a . . . . .   | <b>2</b> | 9,002,886  |
| <b>3</b> Other increases not included in line 2 (itemize) ▶   | <b>3</b> |            |
| <b>4</b> Add lines 1, 2, and 3 . . . . .  | <b>4</b> | 71,423,696 |
| <b>5</b> Decreases not included in line 2 (itemize) ▶ <b>Rounding</b>   | <b>5</b> | 4          |
| <b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .  | <b>6</b> | 71,423,692 |

**Part IV Capital Gains and Losses for Tax on Investment Income**

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.) |   | (b) How acquired<br>P—Purchase<br>D—Donation    | (c) Date acquired<br>(mo., day, yr.)         | (d) Date sold<br>(mo., day, yr.)  |
|--|---|---|--|---|
| <b>1a</b>  | Publicly Traded Securities \ See Attachment A for All Detail, pg 22   | See Attach A                                    | See Attach A                                 | See Attach A  |
| <b>b</b>   |   |   |  |   |
| <b>c</b>   |   |   |  |   |
| <b>d</b>   |   |   |  |   |
| <b>e</b>   |   |   |  |   |
| (e) Gross sales price  | (f) Depreciation allowed<br>(or allowable)  | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |   |
| <b>a</b>   | 9,818,821   | N/A   | 8,437,160                                    | 1,381,661   |
| <b>b</b>   |   |   |  |   |
| <b>c</b>   |   |   |  |   |
| <b>d</b>   |   |   |  |   |
| <b>e</b>   |   |   |  |   |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69  |   |   |  | (i) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
| (j) FMV as of 12/31/69   | (k) Adjusted basis<br>as of 12/31/69  | (l) Excess of col. (i)<br>over col. (j), if any |  |   |
| <b>a</b>   | N/A   | N/A   | N/A  | 1,381,661   |
| <b>b</b>   |   |   |  |   |
| <b>c</b>   |   |   |  |   |
| <b>d</b>   |   |   |  |   |
| <b>e</b>   |   |   |  |   |
| <b>2</b>   | Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 }   |   |  | <b>2</b> 1,381,661  |
| <b>3</b>   | Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions).<br>If (loss), enter -0- in Part I, line 8 |   |  | <b>3</b> N/A  |

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

| (a)<br>Base period years<br>Calendar year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions  | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|--|---|--|---|
| 2008   | 3,531,468   | 57,560,449                                   | 0.0614  |
| 2007   | 2,004,233   | 55,414,627                                   | 0.0362  |
| 2006   | 2,010,202   | 45,514,190                                   | 0.0442  |
| 2005   | 1,436,519   | 34,813,790                                   | 0.0413  |
| 2004   | 1,210,661   | 25,485,921                                   | 0.0475  |
| <b>2</b>   | Total of line 1, column (d)   |  | <b>2</b> .2306  |
| <b>3</b>   | Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years  |  | <b>3</b> .0461  |
| <b>4</b>   | Enter the net value of noncharitable-use assets for 2009 from Part X, line 5  |  | <b>4</b> 62,155,328   |
| <b>5</b>   | Multiply line 4 by line 3   |  | <b>5</b> 2,865,361  |
| <b>6</b>   | Enter 1% of net investment income (1% of Part I, line 27b)  |  | <b>6</b> 36,606   |
| <b>7</b>   | Add lines 5 and 6   |  | <b>7</b> 2,901,967  |
| <b>8</b>   | Enter qualifying distributions from Part XII, line 4<br>If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18. |  | <b>8</b> 3,660,901  |

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

|           |   |           |        |
|-----------|---|-----------|--------|
| <b>1a</b> | Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions) |           |        |
| <b>b</b>  | Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b  | <b>1</b>  | 36,606 |
| <b>c</b>  | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)   |           |        |
| <b>2</b>  | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)   | <b>2</b>  | 0      |
| <b>3</b>  | Add lines 1 and 2   | <b>3</b>  | 36,606 |
| <b>4</b>  | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)   | <b>4</b>  | 0      |
| <b>5</b>  | <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-  | <b>5</b>  | 36,606 |
| <b>6</b>  | Credits/Payments:   |           |        |
| <b>a</b>  | 2009 estimated tax payments and 2008 overpayment credited to 2009   | <b>6a</b> | 50,000 |
| <b>b</b>  | Exempt foreign organizations—tax withheld at source   | <b>6b</b> |        |
| <b>c</b>  | Tax paid with application for extension of time to file (Form 8868)   | <b>6c</b> |        |
| <b>d</b>  | Backup withholding erroneously withheld   | <b>6d</b> |        |
| <b>7</b>  | Total credits and payments. Add lines 6a through 6d   | <b>7</b>  | 50,000 |
| <b>8</b>  | Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached   | <b>8</b>  | 0      |
| <b>9</b>  | <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>   | <b>9</b>  | 0      |
| <b>10</b> | <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>   | <b>10</b> | 13,394 |
| <b>11</b> | Enter the amount of line 10 to be: <b>Credited to 2010 estimated tax</b> 13,394 <b>Refunded</b>   | <b>11</b> | 0      |

**Part VII-A Statements Regarding Activities**

|  | Yes | No  |
|--|-----|-----|
| <b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?   |     | ✓   |
| <b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?<br><i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i> |     | ✓   |
| <b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?   |     | ✓   |
| <b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____  |     |     |
| <b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____  |     |     |
| <b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS?<br><i>If "Yes," attach a detailed description of the activities.</i>  |     | ✓   |
| <b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>  |     | ✓   |
| <b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?  |     | ✓   |
| <b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? <i>N/A</i>  |     | N/A |
| <b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br><i>If "Yes," attach the statement required by General Instruction T.</i>  |     | ✓   |
| <b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?                            | ✓   |     |
| <b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>  | ✓   |     |
| <b>8a</b> Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ <u>Florida</u>   |     |     |
| <b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If "No," attach explanation</i>  | ✓   |     |
| <b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>  |     | ✓   |
| <b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>  |     | ✓   |

**Part VII-A Statements Regarding Activities (continued)**

|   |  |    |   |     |
|---|--|----|---|-----|
| 11  | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions) | 11 |   | ✓   |
| 12  | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  | 12 |   | ✓   |
| 13  | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  | 13 | ✓ |     |
| Website address ► <u>www.bluefoundationfl.com</u> |  |    |   |     |
| 14  | The books are in care of ► <u>Susan Towler</u> Telephone no. ► <u>904-905-6803</u>   |    |   |     |
|   | Located at ► <u>4800 Deerwood Campus Pkwy, Jacksonville, FL</u> ZIP+4 ► <u>32246</u>   |    |   |     |
| 15  | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. and enter the amount of tax-exempt interest received or accrued during the year                     | 15 |   | N/A |

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

|   | Yes | No  |
|---|-----|-----|
| 1a During the year did the foundation (either directly or indirectly):  |     |     |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |     |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |     |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  |     |     |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  |     |     |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?   | 1b  | ✓   |
| Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>   |     |     |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?   | 1c  | ✓   |
| 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):  |     |     |
| a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| If "Yes," list the years ► 20____, 20____, 20____, 20____   |     |     |
| b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)   | 2b  | N/A |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____   |     |     |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) | 3b  | N/A |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  | 4a  | ✓   |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?   | 4b  | ✓   |

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? *N/A* ☐ Yes ☐ No  
If "Yes," attach the statement required by Regulations section 53.4945–5(d). *See Attachment F, pg 54*
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No  
If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

5b

6b

7b

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

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N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (if not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|----------------------|---|---|---|---------------------------------------|
| See Attachment B     | See Atch B  | 0   | 0   | 0                                     |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |

**2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."**

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|------------------|---|---------------------------------------|
| NONE  |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |

Total number of other employees paid over \$50,000 ☐ N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)****3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."**

| (a) Name and address of each person paid more than \$50,000                                    | (b) Type of service   | (c) Compensation |
|--|-----------------------|------------------|
| Blue Cross and Blue Shield of Florida Inc<br>4800 Deerwood Campus Pkwy, Jacksonville, FL 32246 | Professional Services | \$297,934        |
| Stillwaters Consulting<br>212 Eliot Street, Natick, MA 01760                                   | Consulting            | 101,286          |
| MGT of America Inc<br>2123 Center Pointe Blvd, Tallahassee, FL 32308                           | Consulting            | 69,196           |
|  |                       |                  |
|  |                       |                  |
| Total number of others receiving over \$50,000 for professional services                       |                       | N/A              |

**Part IX-A Summary of Direct Charitable Activities**

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.                      | Expenses |
|---|----------|
| <b>1 Obesity/"Embrace" Initiative Conferences:</b> The Blue Foundation held 7 educational conferences addressing the root causes of childhood obesity and potential solutions. Over 120 organizations from across the state of Florida were represented at the conferences. | 37,480   |
| <b>2 Grantee Evaluation Training Sessions:</b> The Blue Foundation held 2 one-day educational seminars entitled "Empowerment Evaluation: A Tool for Outcomes Assessment & Performance Review". Representatives from 21 organizations attended the sessions.                 | 18,863   |
| <b>3</b>  |          |
| <b>4</b>  |          |

**Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 | Amount |
|--|--------|
| <b>1 N/A</b>   |        |
| <b>2</b>   |        |
| All other program-related investments See page 24 of the instructions  |        |
| <b>3</b>   |        |
| <b>Total.</b> Add lines 1 through 3  | 0      |



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

|          |   |           |                   |
|----------|---|-----------|-------------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:                         |           |                   |
| <b>a</b> | Average monthly fair market value of securities . . . . .   | <b>1a</b> | <b>58,082,751</b> |
| <b>b</b> | Average of monthly cash balances . . . . .  | <b>1b</b> | <b>4,840,367</b>  |
| <b>c</b> | Fair market value of all other assets (see page 24 of the instructions) . . . . .   | <b>1c</b> | <b>178,738</b>    |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c) . . . . .   | <b>1d</b> | <b>63,101,856</b> |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . .                 | <b>1e</b> |                   |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets . . . . .  | <b>2</b>  |                   |
| <b>3</b> | Subtract line 2 from line 1d . . . . .  | <b>3</b>  | <b>63,101,856</b> |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions) . . . . . | <b>4</b>  | <b>946,528</b>    |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 . . . . .               | <b>5</b>  | <b>62,155,328</b> |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5 . . . . .  | <b>6</b>  | <b>3,107,766</b>  |

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

|           |   |           |                  |
|-----------|---|-----------|------------------|
| <b>1</b>  | Minimum investment return from Part X, line 6 . . . . .   | <b>1</b>  | <b>3,107,766</b> |
| <b>2a</b> | Tax on investment income for 2009 from Part VI, line 5 . . . . .  | <b>2a</b> | <b>36,606</b>    |
| <b>b</b>  | Income tax for 2009 (This does not include the tax from Part VI.) . . . . .   | <b>2b</b> | <b>0</b>         |
| <b>c</b>  | Add lines 2a and 2b . . . . .   | <b>2c</b> | <b>36,606</b>    |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .                                     | <b>3</b>  | <b>3,071,160</b> |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions . . . . .   | <b>4</b>  | <b>80,000</b>    |
| <b>5</b>  | Add lines 3 and 4 . . . . .   | <b>5</b>  | <b>3,151,160</b> |
| <b>6</b>  | Deduction from distributable amount (see page 25 of the instructions) . . . . .                                     | <b>6</b>  | <b>0</b>         |
| <b>7</b>  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . . | <b>7</b>  | <b>3,151,160</b> |

**Part XII Qualifying Distributions** (see page 25 of the instructions)

|          |   |           |                  |
|----------|---|-----------|------------------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  |           |                  |
| <b>a</b> | Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26 . . . . .   | <b>1a</b> | <b>3,660,901</b> |
| <b>b</b> | Program-related investments—total from Part IX-B . . . . .  | <b>1b</b> | <b>0</b>         |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes . . . . .   | <b>2</b>  | <b>0</b>         |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the:  |           |                  |
| <b>a</b> | Suitability test (prior IRS approval required) . . . . .  | <b>3a</b> | <b>0</b>         |
| <b>b</b> | Cash distribution test (attach the required schedule) . . . . .   | <b>3b</b> | <b>0</b>         |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 . . . . .   | <b>4</b>  | <b>3,660,901</b> |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions) . . . . . | <b>5</b>  | <b>36,606</b>    |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .   | <b>6</b>  | <b>3,624,295</b> |

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see page 26 of the instructions)

|   | (a)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|---|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2009 from Part XI, line 7 . . . . .   |               |                            |             | 3,151,160   |
| <b>2</b> Undistributed income, if any, as of the end of 2009:   |               |                            |             |             |
| <b>a</b> Enter amount for 2008 only . . . . .   |               |                            | 0           |             |
| <b>b</b> Total for prior years: 20 <u>07</u> , 20 <u>06</u> , 20 <u>05</u> . . . . .  |               | 0                          |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2009:   |               |                            |             |             |
| <b>a</b> From 2004 . . . . .  | 0             |                            |             |             |
| <b>b</b> From 2005 . . . . .  | 0             |                            |             |             |
| <b>c</b> From 2006 . . . . .  | 0             |                            |             |             |
| <b>d</b> From 2007 . . . . .  | 0             |                            |             |             |
| <b>e</b> From 2008 . . . . .  | 770,966       |                            |             |             |
| <b>f</b> <b>Total</b> of lines 3a through e . . . . .   | 770,966       |                            |             |             |
| <b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ► \$ <u>3,660,901</u>   |               |                            |             |             |
| <b>a</b> Applied to 2008, but not more than line 2a . . . . .   |               |                            | 0           |             |
| <b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions) . . . . .   |               | 0                          |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions) . . . . .   | 0             |                            |             |             |
| <b>d</b> Applied to 2009 distributable amount . . . . .   |               |                            |             | 3,151,160   |
| <b>e</b> Remaining amount distributed out of corpus . . . . .   | 509,741       |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)  | 0             |                            |             | 0           |
| <b>6</b> Enter the net total of each column as indicated below:   |               |                            |             |             |
| <b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 . . . . .  | 1,280,707     |                            |             |             |
| <b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .   |               | 0                          |             |             |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . . |               | 0                          |             |             |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions . . . . .  |               | 0                          |             |             |
| <b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions . . . . .   |               |                            | 0           |             |
| <b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010 . . . . .  |               |                            |             | 0           |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .                   | 0             |                            |             |             |
| <b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .   | 0             |                            |             |             |
| <b>9</b> <b>Excess distributions carryover to 2010.</b> Subtract lines 7 and 8 from line 6a . . . . .   | 1,280,707     |                            |             |             |
| <b>10</b> Analysis of line 9:   |               |                            |             |             |
| <b>a</b> Excess from 2005 . . . . .   | 0             |                            |             |             |
| <b>b</b> Excess from 2006 . . . . .   | 0             |                            |             |             |
| <b>c</b> Excess from 2007 . . . . .   | 0             |                            |             |             |
| <b>d</b> Excess from 2008 . . . . .   | 770,966       |                            |             |             |
| <b>e</b> Excess from 2009 . . . . .   | 509,741       |                            |             |             |

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . . **N/A**

**b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

|  | Tax year | Prior 3 years |          |          | (e) Total |
|--|----------|---------------|----------|----------|-----------|
|  | (a) 2009 | (b) 2008      | (c) 2007 | (d) 2006 |           |
| <b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .                      |          |               |          |          |           |
| <b>b</b> 85% of line 2a . . . . .  |          |               |          |          |           |
| <b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .   |          |               |          |          |           |
| <b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .   |          |               |          |          |           |
| <b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .                                   |          |               |          |          |           |
| <b>3</b> Complete 3a, b, or c for the alternative test relied upon.  |          |               |          |          |           |
| <b>a</b> "Assets" alternative test—enter:  |          |               |          |          |           |
| <b>(1)</b> Value of all assets . . . . .   |          |               |          |          |           |
| <b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .   |          |               |          |          |           |
| <b>b</b> "Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed . . . . .                      |          |               |          |          |           |
| <b>c</b> "Support" alternative test—enter:   |          |               |          |          |           |
| <b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . . |          |               |          |          |           |
| <b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .                                      |          |               |          |          |           |
| <b>(3)</b> Largest amount of support from an exempt organization . . . . .   |          |               |          |          |           |
| <b>(4)</b> Gross investment income . . . . .   |          |               |          |          |           |

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

**N/A**

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

**N/A**

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a** The name, address, and telephone number of the person to whom applications should be addressed:

**See Attachment C**

**b** The form in which applications should be submitted and information and materials they should include:

**See Attachment C**

**c** Any submission deadlines:

**See Attachment C**

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

**See Attachment C**

**Part XV** Supplementary Information (continued)**3. Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business) | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount    |
|--|--|--------------------------------------|-------------------------------------|-----------|
| <b>a</b> Paid during the year                    |  |                                      |                                     |           |
| See Attachment D, pg. 45                         | N/A  | Attch D                              | See Attachment D                    | 2,888,644 |
| <b>Total</b>                                     |  |                                      | <b>3a</b>                           | 2,888,644 |
| <b>b</b> Approved for future payment             |  |                                      |                                     |           |
| See Attachment E, pg. 52                         | N/A  | Attch E                              | See Attachment E                    | 1,252,163 |
| <b>Total</b>                                     |  |                                      | <b>3b</b>                           | 1,252,163 |



**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

- |    |  | Yes | No |
|----|--|-----|----|
| 1. | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  |     |    |
| a  | Transfers from the reporting foundation to a noncharitable exempt organization of:   |     |    |
|    | (1) Cash   |     | ✓  |
|    | (2) Other assets   |     | ✓  |
| b  | Other transactions:  |     |    |
|    | (1) Sales of assets to a noncharitable exempt organization   |     | ✓  |
|    | (2) Purchases of assets from a noncharitable exempt organization   |     | ✓  |
|    | (3) Rental of facilities, equipment, or other assets   |     | ✓  |
|    | (4) Reimbursement arrangements   |     | ✓  |
|    | (5) Loans or loan guarantees   |     | ✓  |
|    | (6) Performance of services or membership or fundraising solicitations   |     | ✓  |
| c  | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   |     | ✓  |
| d  | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |     |    |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . . . ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|--------------------------|--------------------------|---------------------------------|
| N/A                      |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |

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 taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date \_\_\_\_\_

**Treasurer**  
Title

**Paid  
Preparer's  
Use Only**

Preparer's  
signature 

Date \_\_\_\_\_

Check if self-employed ☐

Preparer's identifying  
number (see **Signature** on  
page 30 of the instructions)

Firm's name (or yours if self-employed), address, and ZIP code

EIN ►

Phone no. \_\_\_\_\_

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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

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

OMB No 1545-0047

**2009**

Name of the organization

The Blue Foundation for a Healthy Florida Inc.

Employer identification number

59 : 3707820

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (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 33⅓% 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, aggregate 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 aggregate 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 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).

Name of organization  
The Blue Foundation for a Healthy Florida Inc.

Employer identification number  
59 : 3707820

**Part I** Contributors (see instructions)

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Aggregate contributions | (d)<br>Type of contribution  |
|------------|---|--------------------------------|--|
| 1          | Blue Cross and Blue Shield of Florida Inc<br>4800 Deerwood Campus Parkway<br>Jacksonville, FL 32246 | \$ 9,809,250                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input checked="" type="checkbox"/><br>(Complete Part II if there is a noncash contribution ) |
| 2          | Robert Wood Johnson Foundation<br>Route 1 and College Road East<br>Princeton, NJ 08543              | \$ 62,500                      | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution ) |
|            |   | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution )            |
|            |   | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution )            |
|            |   | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution )            |
|            |   | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution )            |
|            |   | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution )            |



**Employer identification number**  
59 : 3707820

| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|---------------------------|---|--|----------------------|
| 1                         | See Page 19 for all Detail (Schedule B Part II Attachment)<br>.....<br>.....<br>..... | \$ 9,809,250                                   | See pg. 18<br>.....  |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
| .....                     | .....<br>.....<br>.....   | \$ .....                                       | .....                |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
| .....                     | .....<br>.....<br>.....   | \$ .....                                       | .....                |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
| .....                     | .....<br>.....<br>.....   | \$ .....                                       | .....                |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
| .....                     | .....<br>.....<br>.....   | \$ .....                                       | .....                |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
| .....                     | .....<br>.....<br>.....   | \$ .....                                       | .....                |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given  | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
| .....                     | .....<br>.....<br>.....   | \$ .....                                       | .....                |

Name of organization  
The Blue Foundation for a Healthy Florida Inc.

Employer identification number  
59 : 3707820

**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating 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.) ► \$ N/A

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

THE BLUE FOUNDATION FOR A HEALTHY FLORIDA INC  
 EIN 59-3707820  
 SCHEDULE B PART II ATTACHMENT  
 12/31/09.

| (a) No from Part I - Contributor  | (b) Description of<br>Noncash Property Given | (c) FMV | (d) Date<br>Received |
|---|--|---------|----------------------|
| 1 Blue Cross and Blue Shield of Florida Inc<br>4800 Deerwood Campus Parkway<br>Jacksonville, FL 32246 | 452 shares Aeon Inc                          | 7,996   | 03/12/09             |
|   | 547 shares AAR Corp                          | 6,012   | 03/12/09             |
|   | 1,202 shares ABM Industries Inc              | 18,331  | 03/12/09             |
|   | 533 shares Abaxis Inc                        | 9,280   | 03/12/09             |
|   | 25 shares Abraxis Bioscience Inc             | 1,358   | 03/12/09             |
|   | 1,295 shares Activision Blizzard Inc         | 12,782  | 03/12/09             |
|   | 231 shares Adminstaff Inc                    | 4,345   | 03/12/09             |
|   | 1,516 shares Airtran Holdings Inc            | 5,564   | 03/12/09             |
|   | 1,088 shares Align Technology Inc            | 7,649   | 03/12/09             |
|   | 523 shares Allegiant Travel Co               | 20,815  | 03/12/09             |
|   | 1,310 shares Allergan Inc                    | 51,548  | 03/12/09             |
|   | 1,200 shares Allos Therapeutics Inc          | 8,004   | 03/12/09             |
|   | 337 shares American Science & Engineering    | 19,000  | 03/12/09             |
|   | 352 shares American Sts Writer Co            | 11,074  | 03/12/09             |
|   | 1,177 shares American Superconductor         | 19,056  | 03/12/09             |
|   | 309 shares Ameron International Corp         | 13,958  | 03/12/09             |
|   | 576 shares Amengroup Corp                    | 14,077  | 03/12/09             |
|   | 436 shares Apollo Group Inc                  | 29,979  | 03/12/09             |
|   | 443 shares Applied Signal Technology         | 8,607   | 03/12/09             |
|   | 601 shares Aqua Water Inc                    | 10,271  | 03/12/09             |
|   | 738 shares Arena Resources Inc               | 19,218  | 03/12/09             |
|   | 897 shares Asiatinfo Holdings Inc            | 11,715  | 03/12/09             |
|   | 561 shares Auxilium Pharmaceuticals Inc      | 15,798  | 03/12/09             |
|   | 512 shares Balchem Corp                      | 10,373  | 03/12/09             |
|   | 396 shares Bio-Reference Labs Inc            | 8,708   | 03/12/09             |
|   | 400 shares Biogen Idec Inc                   | 18,988  | 03/12/09             |
|   | 1,887 shares Boeing Company                  | 62,403  | 03/12/09             |
|   | 445 shares Broadridge Financial Solutions    | 7,623   | 03/12/09             |
|   | 519 shares Brush Engineered Mats             | 6,508   | 03/12/09             |
|   | 244 shares Buckle Inc                        | 6,324   | 03/12/09             |
|   | 533 shares CBIZ Inc                          | 3,395   | 03/12/09             |
|   | 575 shares CH Energy Group Inc               | 22,298  | 03/12/09             |
|   | 300 shares CRA International Inc             | 5,943   | 03/12/09             |
|   | 608 shares CA Inc                            | 10,227  | 03/12/09             |
|   | 497 shares California Wtr Svc Gro            | 19,169  | 03/12/09             |
|   | 400 shares Capella Education Co              | 20,520  | 03/12/09             |
|   | 1,856 shares Carter's Inc                    | 33,222  | 03/12/09             |
|   | 1,140 shares Cato Corp                       | 16,804  | 03/12/09             |
|   | 1,883 shares Centennial Communications       | 15,497  | 03/12/09             |
|   | 998 shares Comfort Systems USA Inc           | 9,142   | 03/12/09             |
|   | 348 shares Computer Programs & Systems       | 8,912   | 03/12/09             |
|   | 635 shares Concho Resources Inc              | 13,729  | 03/12/09             |
|   | 333 shares Cubic Corp                        | 8,978   | 03/12/09             |
|   | 1,167 shares Cybersource Corp                | 15,684  | 03/12/09             |
|   | 1,945 shares Dean Foods Co                   | 39,892  | 03/12/09             |
|   | 319 shares Digimarc Corp                     | 3,056   | 03/12/09             |
|   | 907 shares Diodes Inc                        | 8,843   | 03/12/09             |
|   | 1,178 shares Dress Barn Inc                  | 13,335  | 03/12/09             |
|   | 128 shares Dun & Bradstreet Corp             | 9,308   | 03/12/09             |
|   | 1,091 shares Epiq Systems Inc                | 17,685  | 03/12/09             |
|   | 1,221 shares El Paso Elec Co                 | 15,311  | 03/12/09             |
|   | 225 shares Emergent Biosolutions Inc         | 3,692   | 03/12/09             |
|   | 1,106 shares Eresearch Technology Inc        | 5,674   | 03/12/09             |
|   | 134 shares FTI Consulting Inc                | 6,386   | 03/12/09             |
|   | 316 shares Family Dir Stores Inc             | 9,815   | 03/12/09             |
|   | 58 shares Flowserv Corp                      | 3,010   | 03/12/09             |
|   | 2,271 shares Force Protection Inc            | 10,946  | 03/12/09             |
|   | 739 shares Geo Group Inc                     | 9,385   | 03/12/09             |
|   | 679 shares GSI Commerce Inc                  | 7,544   | 03/12/09             |
|   | 700 shares Genentech Inc                     | 65,835  | 03/12/09             |
|   | 533 shares Genomic Health Inc                | 10,346  | 03/12/09             |
|   | 2,470 shares Graitech International LTD      | 15,339  | 03/12/09             |
|   | 391 shares Green Mountain Coffee Inc         | 15,476  | 03/12/09             |
|   | 783 shares HCC HLDGS Inc                     | 17,265  | 03/12/09             |
|   | 246 shares Haemonetics Corp                  | 12,686  | 03/12/09             |
|   | 472 shares Harleysville Group Inc            | 13,339  | 03/12/09             |
|   | 2,255 shares Hexcel Corp                     | 13,350  | 03/12/09             |
|   | 1,675 shares Hilltop Holdings Inc            | 18,542  | 03/12/09             |
|   | 1,553 shares Hot Topic Inc                   | 13,635  | 03/12/09             |
|   | 1,447 shares Immunogen Inc                   | 7,655   | 03/12/09             |
|   | 1,148 shares Interactive Data Corp           | 26,094  | 03/12/09             |
|   | 868 shares Interwoven Inc                    | 14,010  | 03/12/09             |
|   | 647 shares ITC Holdings Corp                 | 22,393  | 03/12/09             |
|   | 377 shares Life Technologies Corp            | 10,752  | 03/12/09             |
|   | 479 shares Martin Transport LTD              | 7,784   | 03/12/09             |
|   | 175 shares Martin Marietta Materials         | 13,309  | 03/12/09             |
|   | 1,353 shares Mastec Inc                      | 15,181  | 03/12/09             |
|   | 424 shares MAXIMUS Inc                       | 14,289  | 03/12/09             |
|   | 177 shares Mednax Inc                        | 4,590   | 03/12/09             |

|   |   |                  |          |
|---|---|------------------|----------|
|   | 517 shares Monro Muffler Brake Inc  | 12,827           | 03/12/09 |
|   | 245 shares National Healthcare Corp                                       | 8,769            | 03/12/09 |
|   | 457 shares Netlogic Microsystems Inc                                      | 12,024           | 03/12/09 |
|   | 562 shares Ntelos Holdings Corp   | 9,908            | 03/12/09 |
|   | 655 shares NV Energy Inc  | 5,561            | 03/12/09 |
|   | 987 shares OM Group Inc   | 16,957           | 03/12/09 |
|   | 198 shares Oceaneering Intl Inc   | 6,342            | 03/12/09 |
|   | 525 shares Ocwen Finl Corp  | 4,609            | 03/12/09 |
|   | 829 shares Optimer Pharmaceuticals Inc                                    | 8,638            | 03/12/09 |
|   | 235 shares Ormat Technologies Inc   | 5,819            | 03/12/09 |
|   | 2,463 shares Orthovita Inc  | 6,847            | 03/12/09 |
|   | 500 shares Osiris Therapeutic Inc   | 8,865            | 03/12/09 |
|   | 387 shares Pico Holdings Inc  | 8,704            | 03/12/09 |
|   | 354 shares Pantry inc   | 5,565            | 03/12/09 |
|   | 291 shares Pegasystems Inc  | 4,714            | 03/12/09 |
|   | 85 shares Penn National Gaming Inc  | 1,827            | 03/12/09 |
|   | 379 shares Penni Corp   | 4,658            | 03/12/09 |
|   | 335 shares Pharmacia Corp   | 4,985            | 03/12/09 |
|   | 461 shares Phase Forward Inc  | 5,329            | 03/12/09 |
|   | 183 shares Powell Industries Inc  | 6,129            | 03/12/09 |
|   | 299 shares Pncesmart Inc  | 4,835            | 03/12/09 |
|   | 376 shares Reliance Steel and Aluminum                                    | 8,411            | 03/12/09 |
|   | 1,100 shares Rohm & Haas Co   | 85,943           | 03/12/09 |
|   | 420 shares SY Bancorp Inc   | 8,467            | 03/12/09 |
|   | 499 shares SAIA Inc   | 4,656            | 03/12/09 |
|   | 446 shares Sanderson Farms Inc  | 15,802           | 03/12/09 |
|   | 11,625 shares Schering-Plough   | 250,403          | 03/12/09 |
|   | 152 shares Shaw Group Inc   | 4,175            | 03/12/09 |
|   | 464 shares Sigma Designs Inc  | 6,482            | 03/12/09 |
|   | 695 shares Solera Holdings Inc  | 14,963           | 03/12/09 |
|   | 904 shares Southern Copper Corp   | 13,939           | 03/12/09 |
|   | 241 shares Stanley Inc  | 6,172            | 03/12/09 |
|   | 443 shares State Auto Financial Corp                                      | 7,207            | 03/12/09 |
|   | 325 shares Systemax Inc   | 3,565            | 03/12/09 |
|   | 868 shares TeleCommunication Systems Inc                                  | 7,230            | 03/12/09 |
|   | 1,194 shares Teletex Holdings Inc   | 11,510           | 03/12/09 |
|   | 2,413 shares TIVO Inc   | 15,949           | 03/12/09 |
|   | 306 shares Tompkins Trustco Inc   | 12,016           | 03/12/09 |
|   | 604 shares Tower Group Inc  | 13,867           | 03/12/09 |
|   | 237 shares Transdigm Group Inc  | 7,352            | 03/12/09 |
|   | 519 shares Tyler Technologies Inc   | 6,503            | 03/12/09 |
|   | 634 shares Unisource Energy Corp  | 16,579           | 03/12/09 |
|   | 4,800 shares Valero Entegy  | 82,704           | 03/12/09 |
|   | 1,279 shares Volcano Corp   | 18,187           | 03/12/09 |
|   | 1,883 shares Watson Pharmaceuticals Inc                                   | 52,517           | 03/12/09 |
|   | 1,444 shares Wind River Systems   | 9,198            | 03/12/09 |
|   | 2,006 shares Validus Holdings LTD   | 44,914           | 03/12/09 |
|   | <b>TOTAL FMV to The Blue Foundation for a Healthy Florida on 3/12/09</b>  | <b>2,029,259</b> |          |
| 1 Blue Cross and Blue Shield of Florida Inc | 433 shares AMAG Pharmaceuticals Inc                                       | 23,196           | 05/11/09 |
| 4800 Deerwood Campus Parkway                | 2,600 shares Airtran Holdings Inc   | 18,343           | 05/11/09 |
| Jacksonville, FL 32246                      | 298 shares Albemarle Corp   | 8,045            | 05/11/09 |
|   | 847 shares Ameristar Casinos Inc  | 18,054           | 05/11/09 |
|   | 519 shares Blue Nile Inc  | 23,752           | 05/11/09 |
|   | 1,716 shares CKE Restaurants  | 15,075           | 05/11/09 |
|   | 400 shares Cal-Maine Foods Inc  | 9,826            | 05/11/09 |
|   | 1,845 shares Dendreon Corp  | 37,472           | 05/11/09 |
|   | 1,394 shares The Finish Line  | 11,124           | 05/11/09 |
|   | 508 shares Forrester Resh Inc   | 11,857           | 05/11/09 |
|   | 1,998 shares Goodyear Tire & Rubber Co                                    | 25,335           | 05/11/09 |
|   | 2,012 shares Harmonic Inc   | 11,398           | 05/11/09 |
|   | 465 shares ICU Medical Inc  | 16,961           | 05/11/09 |
|   | 966 shares Macrovision Solutions Corp                                     | 20,658           | 05/11/09 |
|   | 883 shares Mentage Corp   | 18,843           | 05/11/09 |
|   | 302 shares Middleby Corp  | 13,717           | 05/11/09 |
|   | 235 shares Ormat Technologies Inc   | 9,557            | 05/11/09 |
|   | 435 shares Peets Coffee & Tea Inc   | 10,218           | 05/11/09 |
|   | 600 shares Pepsi Bottling Co  | 19,224           | 05/11/09 |
|   | 1,585 shares Pinnacle Entmt Inc   | 20,256           | 05/11/09 |
|   | 1,015 shares Starbucks Corp   | 13,586           | 05/11/09 |
|   | 327 shares Syntel Inc   | 9,530            | 05/11/09 |
|   | 2,155 shares Target Corp  | 93,290           | 05/11/09 |
|   | 801 shares Texas Industries Inc   | 27,354           | 05/11/09 |
|   | 328 Unifirst Corp   | 11,847           | 05/11/09 |
|   | 1,348 Universal Amer Financial Corp                                       | 13,103           | 05/11/09 |
|   | <b>TOTAL FMV to The Blue Foundation for a Healthy Florida on 5/11/09</b>  | <b>511,621</b>   |          |
| 1 Blue Cross and Blue Shield of Florida Inc | 109,659 shares Vanguard Emerging Market                                   | 2,625,232        | 10/30/09 |
| 4800 Deerwood Campus Parkway                | 154,986 shares Vanguard Tax Managed                                       | 1,669,198        | 10/30/09 |
| Jacksonville, FL 32246                      | 35,956 shares Vanguard FTSE   | 2,973,940        | 10/30/09 |
|   | <b>TOTAL FMV to The Blue Foundation for a Healthy Florida on 10/30/09</b> | <b>7,268,370</b> |          |

TOTAL FMV ALL DONATED SECURITIES

9,809,250

**Statement 1**

Page 1, Part I, Line 16b, Accounting Fees

| Description | (a)<br>Expenses per Book | (b)<br>Net Investment Income | (c)<br>Adjusted Net Income | (d)<br>Charitable Purposes |
|-------------|--------------------------|------------------------------|----------------------------|----------------------------|
| Audit Fees  | 14,520                   | 0                            | N/A                        | 13,980                     |

**Statement 2**

Page 1, Part I, Line 16c, Other Professional Fees

| Description                 | (a)<br>Expenses per Book | (b)<br>Net Investment Income | (c)<br>Adjusted Net Income | (d)<br>Charitable Purposes |
|-----------------------------|--------------------------|------------------------------|----------------------------|----------------------------|
| Consulting/Outside Services | 711,588                  | 0                            | N/A                        | 604,330                    |

**Statement 3**

Page 1, Part I, Line 18, Taxes

| Description  | (a)<br>Expenses per Book | (b)<br>Net Investment Income | (c)<br>Adjusted Net Income | (d)<br>Charitable Purposes |
|--------------|--------------------------|------------------------------|----------------------------|----------------------------|
| Excise Taxes | 51,326                   | 0                            | N/A                        | 0                          |

**Statement 4**

Page 1, Part I, Line 23, Other Expenses

| Description                              | (a)<br>Expenses per Book | (b)<br>Net Investment Income | (c)<br>Adjusted Net Income | (d)<br>Charitable Purposes |
|--|--------------------------|------------------------------|----------------------------|----------------------------|
| Obesity/"Embrace" Initiative Conferences | 0 (A)                    | 0                            | N/A                        | 37,480                     |
| Grantee Evaluation Training Sessions     | 0 (A)                    | 0                            | N/A                        | 18,863                     |
| Amortization/Software                    | 8,206                    | 0                            | N/A                        | 0                          |
| Dues                                     | 24,148                   | 0                            | N/A                        | 23,128                     |
| Office supplies                          | 3,918                    | 0                            | N/A                        | 1,581                      |
| Training                                 | 4,101                    | 0                            | N/A                        | 3,781                      |
| Subscriptions                            | 72                       | 0                            | N/A                        | 69                         |
| Advertising                              | 3,436                    | 0                            | N/A                        | 1,153                      |
| Miscellaneous                            | 1,155                    | 0                            | N/A                        | 752                        |
| Total                                    | 45,036                   | 0                            | N/A                        | 86,807                     |

(A) Expenses of obesity conferences and grantee training sessions are included in other line items for book purposes

**Statement 5**

Page 2, Part II, Line 13, Investments - Other

| Description                           | End of Year (12/31/09) |                       |
|---------------------------------------|------------------------|-----------------------|
|                                       | (b) Book Value         | (c) Fair Market Value |
| Vanguard Total Bond Index             | 40,614,758             | 41,474,844            |
| Vanguard Total Stock Market Index     | 11,954,277             | 11,940,859            |
| Vanguard Total Developed Market Index | 7,452,592              | 7,995,132             |
| Vanguard Emerging Market Index        | 1,494,778              | 1,190,969             |
| PIMCO High Yield Bond Fund            | 3,718,980              | 3,488,655             |
| Vanguard REIT Index Fund              | 3,219,469              | 1,991,568             |
| Totals to Page 2, Part II, Line 13    | 68,454,854             | 68,082,027            |

**Statement 6**

Page 2, Part II, Line 14, Equipment

| Description | End of Year (12/31/09) |                    |                        |
|-------------|------------------------|--------------------|------------------------|
|             | Cost/Book Value        | Accum Amortization | BV Net of Amortization |
| Software    | 49,234                 | 8,206              | 41,028                 |

## ATTACHMENT A

## THE BLUE FOUNDATION FOR A HEALTHY FLORIDA, INC.

EIN: 59-3707820

## 2009 FORM 990-PF, PAGE 3, PART IV, LINE 1

| (a) Description of property sold          | (b) Acquired<br>P - Purchase<br>D - Donation | (c) Date<br>Acquired | (d) Date<br>Sold | (e) Gross<br>Sales Price | (f) Deprec | (g) Cost or<br>Other Basis | (h) Gain<br>or Loss |
|---|--|----------------------|------------------|--------------------------|------------|----------------------------|---------------------|
|   |  |                      |                  |                          |            |                            |                     |
| Ln 1) 452 shares Aeon Inc                 | D  | 03/12/09             | 03/13/09         | 8,133                    | N/A        | 5,906                      | 2,227               |
| 547 shares AAR Corp                       | D  | 03/12/09             | 03/13/09         | 6,256                    | N/A        | 3,041                      | 3,215               |
| 1,202 shares ABM Industries Inc           | D  | 03/12/09             | 03/13/09         | 18,618                   | N/A        | 14,756                     | 3,862               |
| 533 shares Abaxis Inc                     | D  | 03/12/09             | 03/13/09         | 9,568                    | N/A        | 7,810                      | 1,758               |
| 25 shares Abraxis Bioscience Inc          | D  | 03/12/09             | 03/13/09         | 1,352                    | N/A        | 11                         | 1,341               |
| 1,295 shares Activision Blizzard Inc      | D  | 03/12/09             | 03/13/09         | 12,458                   | N/A        | 8,376                      | 4,082               |
| 231 shares Adminstaff Inc                 | D  | 03/12/09             | 03/13/09         | 4,426                    | N/A        | 1,339                      | 3,087               |
| 1,516 shares Airtran Holdings Inc         | D  | 03/12/09             | 03/13/09         | 5,943                    | N/A        | 3,199                      | 2,744               |
| 1,088 shares Align Technology Inc         | D  | 03/12/09             | 03/13/09         | 8,127                    | N/A        | 3,257                      | 4,870               |
| 523 shares Allegiant Travel Co            | D  | 03/12/09             | 03/13/09         | 21,007                   | N/A        | 11,731                     | 9,276               |
| 1,310 shares Allergan Inc                 | D  | 03/12/09             | 03/13/09         | 53,079                   | N/A        | 48,086                     | 4,993               |
| 1,200 shares Allos Therapeutics Inc       | D  | 03/12/09             | 03/13/09         | 8,067                    | N/A        | 5,997                      | 2,070               |
| 337 shares American Science & Engineering | D  | 03/12/09             | 03/13/09         | 19,283                   | N/A        | 14,494                     | 4,789               |
| 352 shares American Sts Writer Co         | D  | 03/12/09             | 03/13/09         | 12,146                   | N/A        | 8,045                      | 4,101               |
| 1,177 shares American Superconductor      | D  | 03/12/09             | 03/13/09         | 18,692                   | N/A        | 12,770                     | 5,922               |
| 309 shares Ameron International Corp      | D  | 03/12/09             | 03/13/09         | 13,670                   | N/A        | 8,358                      | 5,312               |
| 576 shares Amengroup Corp                 | D  | 03/12/09             | 03/13/09         | 15,067                   | N/A        | 9,219                      | 5,848               |
| 436 shares Apollo Group Inc               | D  | 03/12/09             | 03/13/09         | 29,367                   | N/A        | 27,026                     | 2,341               |
| 443 shares Applied Signal Technology      | D  | 03/12/09             | 03/13/09         | 8,618                    | N/A        | 6,033                      | 2,585               |
| 601 shares Aqua Water Inc                 | D  | 03/12/09             | 03/13/09         | 10,526                   | N/A        | 8,883                      | 1,643               |
| 738 shares Arena Resources Inc            | D  | 03/12/09             | 03/13/09         | 19,250                   | N/A        | 12,650                     | 6,600               |
| 897 shares Asiantfo Holdings Inc          | D  | 03/12/09             | 03/13/09         | 12,140                   | N/A        | 8,450                      | 3,690               |
| 561 shares Auxilium Pharmaceuticals Inc   | D  | 03/12/09             | 03/13/09         | 16,764                   | N/A        | 8,745                      | 8,019               |
| 512 shares Bactchem Corp                  | D  | 03/12/09             | 03/13/09         | 10,434                   | N/A        | 6,751                      | 3,683               |
| 396 shares Bio-Reference Labs Inc         | D  | 03/12/09             | 03/13/09         | 8,698                    | N/A        | 5,454                      | 3,244               |
| 400 shares Biogen Idec Inc                | D  | 03/12/09             | 03/13/09         | 19,386                   | N/A        | 13,392                     | 5,994               |
| 1,887 shares Boeing Company               | D  | 03/12/09             | 03/13/09         | 62,279                   | N/A        | 60,281                     | 1,998               |
| 445 shares Broadridge Financial Solutions | D  | 03/12/09             | 03/13/09         | 7,968                    | N/A        | 732                        | 7,236               |
| 519 shares Brush Engineered Mattis        | D  | 03/12/09             | 03/13/09         | 6,713                    | N/A        | 4,317                      | 2,396               |
| 244 shares Buckle Inc                     | D  | 03/12/09             | 03/13/09         | 6,620                    | N/A        | 2,077                      | 4,543               |
| 533 shares CBIZ Inc                       | D  | 03/12/09             | 03/13/09         | 3,512                    | N/A        | 1,047                      | 2,465               |
| 575 shares CH Energy Group Inc            | D  | 03/12/09             | 03/13/09         | 22,929                   | N/A        | 19,624                     | 3,305               |
| 300 shares CRA International Inc          | D  | 03/12/09             | 03/13/09         | 5,851                    | N/A        | 4,437                      | 1,414               |
| 608 shares CA Inc                         | D  | 03/12/09             | 03/13/09         | 10,193                   | N/A        | 8,167                      | 2,026               |
| 497 shares California Wtr Svc Gro         | D  | 03/12/09             | 03/13/09         | 19,819                   | N/A        | 12,502                     | 7,317               |
| 400 shares Capella Education Co           | D  | 03/12/09             | 03/13/09         | 19,546                   | N/A        | 15,837                     | 3,709               |
| 1,856 shares Carter's Inc                 | D  | 03/12/09             | 03/13/09         | 32,742                   | N/A        | 27,396                     | 5,346               |

|   |   |          |          |        |     |        |       |
|---|---|----------|----------|--------|-----|--------|-------|
| 1,140 shares Cato Corp                  | D | 03/12/09 | 03/13/09 | 17,424 | N/A | 9,048  | 8,376 |
| 1,883 shares Centennial Communications  | D | 03/12/09 | 03/13/09 | 15,478 | N/A | 12,117 | 3,361 |
| 998 shares Comfort Systems USA Inc      | D | 03/12/09 | 03/13/09 | 9,463  | N/A | 6,170  | 3,293 |
| 348 shares Computer Programs & Systems  | D | 03/12/09 | 03/13/09 | 9,650  | N/A | 6,660  | 2,990 |
| 635 shares Concho Resources Inc         | D | 03/12/09 | 03/13/09 | 14,084 | N/A | 11,908 | 2,176 |
| 333 shares Cubic Corp                   | D | 03/12/09 | 03/13/09 | 9,125  | N/A | 2,293  | 6,832 |
| 1,167 shares Cybersource Corp           | D | 03/12/09 | 03/13/09 | 15,764 | N/A | 11,649 | 4,115 |
| 1,945 shares Dean Foods Co              | D | 03/12/09 | 03/13/09 | 40,721 | N/A | 36,416 | 4,305 |
| 319 shares Digimarc Corp                | D | 03/12/09 | 03/13/09 | 3,074  | N/A | 1      | 3,073 |
| 907 shares Diodes Inc                   | D | 03/12/09 | 03/13/09 | 8,984  | N/A | 4,664  | 4,320 |
| 1,178 shares Dress Barn Inc             | D | 03/12/09 | 03/13/09 | 13,193 | N/A | 7,124  | 6,069 |
| 128 shares Dun & Bradstreet Corp        | D | 03/12/09 | 03/13/09 | 9,425  | N/A | 7,936  | 1,489 |
| 1,091 shares Epiq Systems Inc           | D | 03/12/09 | 03/13/09 | 18,115 | N/A | 13,112 | 5,003 |
| 1,221 shares El Paso Elec Co            | D | 03/12/09 | 03/13/09 | 15,487 | N/A | 13,697 | 1,790 |
| 225 shares Emergent Biosolutions Inc    | D | 03/12/09 | 03/13/09 | 3,572  | N/A | 1,199  | 2,373 |
| 1,106 shares Eresearch Technology Inc   | D | 03/12/09 | 03/13/09 | 6,029  | N/A | 4,140  | 1,889 |
| 134 shares FTI Consulting Inc           | D | 03/12/09 | 03/13/09 | 6,310  | N/A | 1,297  | 5,013 |
| 316 shares Family Dir Stores Inc        | D | 03/12/09 | 03/13/09 | 9,894  | N/A | 8,406  | 1,488 |
| 58 shares Flowserve Corp                | D | 03/12/09 | 03/13/09 | 3,021  | N/A | 1,472  | 1,549 |
| 2,271 shares Force Protection Inc       | D | 03/12/09 | 03/13/09 | 11,609 | N/A | 5,808  | 5,801 |
| 739 shares Geo Group Inc                | D | 03/12/09 | 03/13/09 | 9,911  | N/A | 3,646  | 6,265 |
| 679 shares GSI Commerce Inc             | D | 03/12/09 | 03/13/09 | 7,700  | N/A | 4,518  | 3,182 |
| 700 shares Genentech Inc                | D | 03/12/09 | 03/13/09 | 65,778 | N/A | 60,613 | 5,165 |
| 533 shares Genomic Health Inc           | D | 03/12/09 | 03/13/09 | 10,610 | N/A | 6,128  | 4,482 |
| 2,470 shares Graftech International LTD | D | 03/12/09 | 03/13/09 | 15,715 | N/A | 13,698 | 2,017 |
| 391 shares Green Mountain Coffee Inc    | D | 03/12/09 | 03/13/09 | 16,095 | N/A | 9,251  | 6,844 |
| 783 shares HCC HLDGS Inc                | D | 03/12/09 | 03/13/09 | 17,466 | N/A | 15,370 | 2,096 |
| 246 shares Haemonetics Corp             | D | 03/12/09 | 03/13/09 | 13,245 | N/A | 7,385  | 5,860 |
| 472 shares Harleysville Group Inc       | D | 03/12/09 | 03/13/09 | 13,866 | N/A | 9,319  | 4,547 |
| 2,255 shares Hexcel Corp                | D | 03/12/09 | 03/13/09 | 13,790 | N/A | 7,056  | 6,734 |
| 1,675 shares Hilltop Holdings Inc       | D | 03/12/09 | 03/13/09 | 19,004 | N/A | 15,416 | 3,588 |
| 1,553 shares Hot Topic Inc              | D | 03/12/09 | 03/13/09 | 13,660 | N/A | 8,323  | 5,337 |
| 1,447 shares Immunogen Inc              | D | 03/12/09 | 03/13/09 | 8,455  | N/A | 4,703  | 3,752 |
| 1,148 shares Interactive Data Corp      | D | 03/12/09 | 03/13/09 | 27,093 | N/A | 23,141 | 3,952 |
| 868 shares Interwoven Inc               | D | 03/12/09 | 03/13/09 | 13,951 | N/A | 7,677  | 6,274 |
| 647 shares ITC Holdings Corp            | D | 03/12/09 | 03/13/09 | 22,714 | N/A | 17,710 | 5,004 |
| 377 shares Life Technologies Corp       | D | 03/12/09 | 03/13/09 | 10,937 | N/A | 8,973  | 1,964 |
| 479 shares Marten Transport LTD         | D | 03/12/09 | 03/13/09 | 8,100  | N/A | 5,768  | 2,332 |
| 175 shares Martin Manetta Materials     | D | 03/12/09 | 03/13/09 | 13,352 | N/A | 10,723 | 2,629 |
| 1,353 shares Mastec Inc                 | D | 03/12/09 | 03/13/09 | 14,827 | N/A | 9,151  | 5,676 |
| 424 shares MAXIMUS Inc                  | D | 03/12/09 | 03/13/09 | 14,530 | N/A | 10,825 | 3,705 |
| 177 shares Mednax Inc                   | D | 03/12/09 | 03/13/09 | 4,885  | N/A | 2,935  | 1,950 |
| 517 shares Monro Muffler Brake Inc      | D | 03/12/09 | 03/13/09 | 12,780 | N/A | 5,344  | 7,436 |
| 245 shares National Healthcare Corp     | D | 03/12/09 | 03/13/09 | 9,050  | N/A | 4,907  | 4,143 |
| 457 shares Netlogic Microsystems Inc    | D | 03/12/09 | 03/13/09 | 12,202 | N/A | 8,090  | 4,112 |
| 562 shares Ntelos Holdings Corp         | D | 03/12/09 | 03/13/09 | 10,189 | N/A | 8,119  | 2,070 |
| 655 shares NV Energy Inc                | D | 03/12/09 | 03/13/09 | 5,781  | N/A | 3,106  | 2,675 |
| 987 shares OM Group Inc                 | D | 03/12/09 | 03/13/09 | 17,180 | N/A | 14,394 | 2,    |

|  |   |          |          |         |     |         |         |
|--|---|----------|----------|---------|-----|---------|---------|
| 198 shares Oceaneering Intl Inc          | D | 03/12/09 | 03/13/09 | 6,623   | N/A | 2,025   | 4,598   |
| 525 shares Ocwen Finl Corp               | D | 03/12/09 | 03/13/09 | 4,868   | N/A | 2,541   | 2,327   |
| 829 shares Optimer Pharmaceuticals Inc   | D | 03/12/09 | 03/13/09 | 9,085   | N/A | 6,922   | 2,163   |
| 235 shares Omat Technologies Inc         | D | 03/12/09 | 03/13/09 | 5,849   | N/A | 10,232  | (4,383) |
| 2,463 shares Orthovita Inc               | D | 03/12/09 | 03/13/09 | 7,260   | N/A | 5,098   | 2,162   |
| 500 shares Osins Therapeutic Inc         | D | 03/12/09 | 03/13/09 | 8,875   | N/A | 6,288   | 2,587   |
| 387 shares Pico Holdings Inc             | D | 03/12/09 | 03/13/09 | 9,169   | N/A | 6,960   | 2,209   |
| 354 shares Pantry Inc                    | D | 03/12/09 | 03/13/09 | 5,824   | N/A | 2,782   | 3,042   |
| 291 shares Pegasystems Inc               | D | 03/12/09 | 03/13/09 | 4,863   | N/A | 1,986   | 2,877   |
| 85 shares Penn National Gaming Inc       | D | 03/12/09 | 03/13/09 | 1,861   | N/A | 319     | 1,542   |
| 379 shares Penni Corp                    | D | 03/12/09 | 03/13/09 | 4,656   | N/A | 3,223   | 1,433   |
| 335 shares Pharmenca Corp                | D | 03/12/09 | 03/13/09 | 5,064   | N/A | 2,195   | 2,869   |
| 461 shares Phase Forward Inc             | D | 03/12/09 | 03/13/09 | 5,477   | N/A | 3,696   | 1,781   |
| 183 shares Powell Industries Inc         | D | 03/12/09 | 03/13/09 | 5,942   | N/A | 2,669   | 3,273   |
| 299 shares Procsmart Inc                 | D | 03/12/09 | 03/13/09 | 5,058   | N/A | 2,995   | 2,063   |
| 376 shares Reliance Steel and Aluminum   | D | 03/12/09 | 03/13/09 | 8,627   | N/A | 3,623   | 5,004   |
| 1,100 shares Rohm & Haas Co              | D | 03/12/09 | 03/13/09 | 86,020  | N/A | 76,881  | 9,139   |
| 420 shares SY Bancorp Inc                | D | 03/12/09 | 03/13/09 | 8,612   | N/A | 7,106   | 1,506   |
| 499 shares SAIA Inc                      | D | 03/12/09 | 03/13/09 | 4,792   | N/A | 2,340   | 2,452   |
| 446 shares Sanderson Farms Inc           | D | 03/12/09 | 03/13/09 | 15,999  | N/A | 12,914  | 3,085   |
| 11,625 shares Schering-Plough            | D | 03/12/09 | 03/13/09 | 269,824 | N/A | 219,557 | 50,267  |
| 152 shares Shaw Group Inc                | D | 03/12/09 | 03/13/09 | 4,087   | N/A | 1,821   | 2,266   |
| 464 shares Sigma Designs Inc             | D | 03/12/09 | 03/13/09 | 6,730   | N/A | 4,375   | 2,355   |
| 695 shares Solera Holdings Inc           | D | 03/12/09 | 03/13/09 | 15,414  | N/A | 13,094  | 2,320   |
| 904 shares Southern Copper Corp          | D | 03/12/09 | 03/13/09 | 14,410  | N/A | 12,353  | 2,057   |
| 241 shares Stanley Inc                   | D | 03/12/09 | 03/13/09 | 6,261   | N/A | 4,559   | 1,702   |
| 443 shares State Auto Financial Corp     | D | 03/12/09 | 03/13/09 | 7,433   | N/A | 5,380   | 2,053   |
| 325 shares Systemax Inc                  | D | 03/12/09 | 03/13/09 | 3,648   | N/A | 2,843   | 805     |
| 868 shares TeleCommunication Systems Inc | D | 03/12/09 | 03/13/09 | 7,411   | N/A | 4,001   | 3,410   |
| 1,194 shares Teletch Holdings Inc        | D | 03/12/09 | 03/13/09 | 11,564  | N/A | 9,990   | 1,574   |
| 2,413 shares TIVO Inc                    | D | 03/12/09 | 03/13/09 | 15,923  | N/A | 13,710  | 2,213   |
| 306 shares Tompkins Trustco Inc          | D | 03/12/09 | 03/13/09 | 12,323  | N/A | 10,220  | 2,103   |
| 604 shares Tower Group Inc               | D | 03/12/09 | 03/13/09 | 14,014  | N/A | 7,033   | 6,981   |
| 237 shares Transdigm Group Inc           | D | 03/12/09 | 03/13/09 | 7,598   | N/A | 5,655   | 1,943   |
| 519 shares Tyler Technologies Inc        | D | 03/12/09 | 03/13/09 | 6,578   | N/A | 2,740   | 3,838   |
| 634 shares Unisource Energy Corp         | D | 03/12/09 | 03/13/09 | 16,933  | N/A | 9,363   | 7,570   |
| 4,800 shares Valero Entegy               | D | 03/12/09 | 03/13/09 | 81,693  | N/A | 77,328  | 4,365   |
| 1,279 shares Volcano Corp                | D | 03/12/09 | 03/13/09 | 19,666  | N/A | 15,410  | 4,256   |
| 1,883 shares Watson Pharmaceuticals Inc  | D | 03/12/09 | 03/13/09 | 53,125  | N/A | 48,329  | 4,796   |
| 1,444 shares Wind River Systems          | D | 03/12/09 | 03/13/09 | 9,434   | N/A | 7,220   | 2,214   |
| 2,006 shares Validus Holdings LTD        | D | 03/12/09 | 03/13/09 | 46,880  | N/A | 42,206  | 4,674   |
| 433 shares AMAG Pharmaceuticals Inc      | D | 05/11/09 | 05/14/09 | 22,997  | N/A | 13,082  | 9,915   |
| 2,600 shares Airtran Holdings Inc        | D | 05/11/09 | 05/14/09 | 15,710  | N/A | 10,546  | 5,164   |
| 298 shares Albemarle Corp                | D | 05/11/09 | 05/14/09 | 7,528   | N/A | 4,151   | 3,377   |
| 847 shares Ameristar Casinos Inc         | D | 05/11/09 | 05/14/09 | 14,843  | N/A | 9,006   | 5,837   |
| 519 shares Blue Nile Inc                 | D | 05/11/09 | 05/14/09 | 21,621  | N/A | 16,063  | 5,558   |
| 1,716 shares CKE Restaurants             | D | 05/11/09 | 05/14/09 | 13,885  | N/A | 12,188  | 1,697   |
| 400 shares Cal-Maine Foods Inc           | D | 05/11/09 | 05/14/09 | 8,938   | N/A | 6,144   | 2,794   |



|   |   |          |          |           |     |           |           |
|---|---|----------|----------|-----------|-----|-----------|-----------|
| 1,845 shares Dendreon Corp              | D | 05/11/09 | 05/14/09 | 38,251    | N/A | 8,640     | 29,611    |
| 1,394 shares The Finish Line            | D | 05/11/09 | 05/14/09 | 9,936     | N/A | 7,377     | 2,559     |
| 508 shares Forrester Resh Inc           | D | 05/11/09 | 05/14/09 | 11,414    | N/A | 8,184     | 3,230     |
| 1,998 shares Goodyear Tire & Rubber Co  | D | 05/11/09 | 05/14/09 | 21,808    | N/A | 13,059    | 8,749     |
| 2,012 shares Harmonic Inc               | D | 05/11/09 | 05/14/09 | 10,209    | N/A | 9,738     | 471       |
| 465 shares ICU Medical Inc              | D | 05/11/09 | 05/14/09 | 17,253    | N/A | 12,781    | 4,472     |
| 966 shares Macrovision Solutions Corp   | D | 05/11/09 | 05/14/09 | 19,980    | N/A | 15,591    | 4,389     |
| 883 shares Mentage Corp                 | D | 05/11/09 | 05/14/09 | 16,733    | N/A | 11,444    | 5,289     |
| 302 shares Middleby Corp                | D | 05/11/09 | 05/14/09 | 13,292    | N/A | 8,207     | 5,085     |
| 235 shares Ormat Technologies Inc       | D | 05/11/09 | 05/14/09 | 8,765     | N/A | 4,040     | 4,725     |
| 435 shares Peets Coffee & Tea Inc       | D | 05/11/09 | 05/14/09 | 11,112    | N/A | 7,862     | 3,250     |
| 600 shares Pepsi Bottling Co            | D | 05/11/09 | 05/14/09 | 19,231    | N/A | 13,398    | 5,833     |
| 1,585 shares Pinnacle Entmt Inc         | D | 05/11/09 | 05/14/09 | 17,345    | N/A | 10,976    | 6,369     |
| 1,015 shares Starbucks Corp             | D | 05/11/09 | 05/14/09 | 13,083    | N/A | 8,770     | 4,313     |
| 327 shares Syntel Inc                   | D | 05/11/09 | 05/14/09 | 9,097     | N/A | 5,053     | 4,044     |
| 2,155 shares Target Corp                | D | 05/11/09 | 05/14/09 | 87,803    | N/A | 65,307    | 22,496    |
| 801 shares Texas Industries Inc         | D | 05/11/09 | 05/14/09 | 25,125    | N/A | 14,341    | 10,784    |
| 328 Unifirst Corp                       | D | 05/11/09 | 05/14/09 | 11,003    | N/A | 7,569     | 3,434     |
| 1,348 Universal Amer Financial Corp     | D | 05/11/09 | 05/14/09 | 12,044    | N/A | 8,490     | 3,554     |
| 109,659 shares Vanguard Emerging Market | D | 10/30/09 | 10/30/09 | 2,618,669 | N/A | 2,093,387 | 525,282   |
| 154,986 shares Vanguard Tax managed     | D | 10/30/09 | 10/30/09 | 1,669,198 | N/A | 1,590,155 | 79,043    |
| 35,956 shares Vanguard FTSE             | D | 10/30/09 | 10/30/09 | 2,973,940 | N/A | 2,870,027 | 103,913   |
| TOTALS                                  |   |          |          | 9,818,821 |     | 8,437,160 | 1,381,661 |

**ATTACHMENT B**  
**The Blue Foundation for a Healthy Florida, Inc.**  
**EIN. 59-3707820**  
**2009 Form 990-PF, Page 6, Part VIII, Line 1**  
**List of Foundation Officers, Directors and Managers**

Page 6, Part VIII, Line 1

| (a) Name & Address   | (b) Title, and average hours per week devoted to position                       | (c) Compensation (if not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|--|---|---|---|---------------------------------------|
| <b>FOUNDATION MANAGER</b>  |   |   |   |                                       |
| Susan B Towler<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246            | Vice President - 10 hours per week  | 0   | 0   | 0                                     |
| <b>OFFICERS</b>  |   |   |   |                                       |
| Randy M Kammer<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246            | President - 2 hours per week  | 0   | 0   | 0                                     |
| Tony Jenkins<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246              | Vice President - 1 hour per week  | 0   | 0   | 0                                     |
| Kim Read<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246                  | Treasurer - 1 hour per week   | 0   | 0   | 0                                     |
| Chip Kenyon<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246               | Secretary<br>1 hour per week  | 0   | 0   | 0                                     |
| <b>BOARD OF DIRECTORS</b>  |   |   |   |                                       |
| Frank Astor MD<br>8400 NW 33rd Street, Suite 100<br>Miami, FL 33122-1932         | BCBSF Medical Director<br>1 hour per week                                       | 0   | 0   | 0                                     |
| Michael Cascone, Jr<br>8022 James Island Trail<br>Jacksonville, FL 32256         | BCBSF Retired CEO<br>1 hour per week  | 0   | 0   | 0                                     |
| Martha Garcia<br>8400 NW 33rd Street, Suite 100<br>Miami, FL 33122-1922          | BCBSF Operations Manager<br>1 hour per week                                     | 0   | 0   | 0                                     |
| Randy M Kammer<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246            | BCBSF Vice President, Public Policy and Regulatory Affairs -<br>1 hour per week | 0   | 0   | 0                                     |
| Deanna McDonald<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246           | BCBSF, Group VP<br>1 hour per week  | 0   | 0   | 0                                     |
| Tony Jenkins<br>610 Crescent Executive Ct, Suite 600<br>Lake Mary, FL 32746-2109 | BCBSF Market President, Central FL Region<br>1 hour per week                    | 0   | 0   | 0                                     |
| Cyrus M Jollivette<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246        | BCBSF Sr Vice President, Public Affairs<br>2 hours per week                     | 0   | 0   | 0                                     |
| Chip Kenyon<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246               | BCBSF Director<br>Product Services Management<br>1 hour per week                | 0   | 0   | 0                                     |
| Mark McGowan<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246              | BCBSF Assistant General Counsel<br>1 hour per week                              | 0   | 0   | 0                                     |
| Kim Read<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246                  | BCBSF Sr Director, Financial Control<br>1 hour per week                         | 0   | 0   | 0                                     |
| Darnell Smith<br>4800 Deerwood Campus Pkwy<br>Jacksonville, FL 32246             | BCBSF Group VP, Service Organization<br>1 hour per week                         | 0   | 0   | 0                                     |

## **ATTACHMENT C**

The Blue Foundation for a Healthy Florida, Inc.  
EIN: 59-3707820  
2009 FORM 990-PF, Page 10, Part XV, Line 2  
Information Regarding Grants/Contributions

- 2a. Name, address and telephone number of the person to whom applications should be addressed:

GRANT APPLICATIONS: The Blue Foundation has launched an online application process beginning with the Winter - 2009 grant cycle for IMPACT (Improving Access to Health Care) Grant Program. This online application can be accessed on the Blue Foundation's website:  
[www.bluefoundationfl.com](http://www.bluefoundationfl.com)

If an online application cannot be completed, please contact Jared Skok at 1-800-477-3736, Ext 63215, Option 1.

SAPPHIRE AWARD NOMINATIONS: The Blue Foundation is in the process of providing an online application on its website for the 2010 Sapphire Awards; however, the online application is not yet complete. Questions can be directed to Susan Wildes at 1-800-477-3736 (ext. 63215, Option 2).

- 2b. The form in which applications should be submitted and information and materials to include:

See Attached "IMPACT Grants Program Information" and "Sapphire Award Nominations". More information can be obtained by visiting  
[www.bluefoundationfl.com](http://www.bluefoundationfl.com)

- 2c. Any submission deadlines:

For 2010, there are two grant proposal cycles - Summer and Winter. The next deadline for grant applications (Winter cycle) is September 10, 2010. The deadline for the summer cycle was March 12, 2010.

The 2010 Sapphire Award Nomination Deadline is May 6, 2010.

**ATTACHMENT C – Page 2**

The Blue Foundation for a Healthy Florida, Inc.  
EIN: 59-3707820  
2009 FORM 990-PF, Page 9, Part XV, Line 2  
Information Regarding Grants/Contributions

**2d. Any restrictions or limitations on awards:**

See attached "IMPACT Grants Program Information", and "Sapphire Award Nominations".

IMPACT Grants Program - The Blue Foundation awards charitable grants and contributions to organizations that positively impact the health and well-being of uninsured and underserved Floridians. The Foundation also supports health education, awareness and training programs and workforce preparation initiatives that address the health care challenges facing Florida today.

Eligible grant recipients must be IRC Sec. 501(c)(3) organizations or governmental agencies, and cannot be classified as a private foundation. The organization that is applying must be located in Florida and operate the program in Florida to directly serve Floridians. The Blue Foundation will not award grants to individuals; fundraising events or celebrations; political or lobbying organizations; fraternal, athletic or social organizations; religious organizations for religious purposes; Type III Supporting Organizations; or organizations that do not directly serve Floridians. For more information, see "Eligibility" on the attached "IMPACT Grants Program Information"

Sapphire Awards Program - Eligible Sapphire Award recipients must have a proven record of improving the health of their community through measurable outcomes and have programs that are involved with health-related services. They must be IRC Sec. 501(c)(3) public charity organizations or governmental agencies, and must officially reside and be incorporated in the state of Florida. For more information, see "Eligibility" on the attached "Sapphire Award Nomination".

# IMPACT Health Care (Improving Access to Health Care) Grants Program

Page 1 of 6

## Overview

The Blue Foundation for a Healthy Florida, Inc., the philanthropic affiliate of Blue Cross and Blue Shield of Florida (BCBSF), accepts applications for the Improving Access to Health Care grants program during two proposal cycles in the summer and winter. Grants are strategically awarded to diverse, philanthropic, community-based solutions that:

- Improve program capacity and reduce barriers to access
- Nurture community health leadership to reinforce local solutions, foster innovation and sustain quality
- Leverage financial, human and other resources to maximize measurable impact.

IMPACT Health Care grants are rich in diversity, from mobile clinics to provide health care to children, to training physicians on women's heart disease symptoms, to improving the lives of Hispanics with diabetes. These grants educate, train and improve the lives of individuals and families throughout Florida.

The current focus for the IMPACT Health Care grants program is on community-based health clinics and outreach programs.

Within the community health clinic arena, we prefer to focus funding on:

- Philanthropic, innovative approaches to health care education, awareness and training programs, especially those that have a grassroots or community outreach component;
- Demonstration and/or research projects that attempt to find a new way to deliver health care or to increase access to health care services for the uninsured and underserved;
- Projects that use innovative techniques or use collaborative methods to address a specific problem in a geographic area or target population.

We will consider funding for:

- Direct health care services, but must not serve as a replacement for insurance reimbursements or as a supplement to insurance reimbursements from Blue Cross and Blue Shield of Florida.
- General operating support alone or capital campaigns, but this is not a priority area.
- Equipment and supply purchases within proposals.

The Blue Foundation will not fund administrative overhead charges for universities or higher education institutions.

## Decision-Making Process

The Blue Foundation uses a four-step review process that spans approximately three months:

- Independent readers review all proposals submitted using the foundation's established grant criteria.
- Following this initial review, The Blue Foundation Employee Review Team receives selected proposals, conducts site review visits and makes funding recommendations to the Foundation board of directors grant committee.
- The grant committee submits its final recommendations to the Foundation board of directors.
- The Foundation board of directors approves the grants.

The Employee Review Team is composed of 18 Blue Cross and Blue Shield of Florida

**IMPACT**  
Improving Access to Health Care

- [Overview](#)
- [Guidelines](#)
- [Eligibility](#)
- [The Application Process](#)
- [Application Dates](#)
- [Attachment](#)
- [Start a NEW Application](#)
- [Access an EXISTING Application](#)

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employees from across Florida who are involved in the community and have various skills in planning, medical services, finance, marketing, communications and grantmaking. The members of the team serve alternating terms of service. Members are chosen through an application process and are selected by the Foundation board of directors.

Our proposal evaluation criteria includes, but is not exclusive to, the following characteristics:

- Compelling fit with The Blue Foundation mission and guiding principles.
- Quality of leadership within the organization must be strong and respected by the community.
- Financial strength of the institution with a record of stable funding and strong budgetary control.
- Organizational diversity, with representation of the population being served and a proven record of staff and board diversity.
- Quality of planning where there is a demonstrated commitment of a detailed planning process that engages the necessary resources and leadership with a credible evaluation strategy.
- Potential favorable impact with such components as an expected significant outcome, high quality intervention, appropriate number served relative to goals/budget, likelihood to influence other organizations, possible chance for positive systemic change, and a practical evaluation plan.

Proposals are not scored or ranked based on a grading or numerical system. We will not provide feedback on why your proposal was not chosen - many proposals meet our criteria and are similar to past grants we have made. It is often a matter of financial resources at The Blue Foundation that causes proposals to be denied.

## **Guidelines**

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## **Eligibility**

### **Who can apply for an IMPACT Health Care grant?**

The Blue Foundation makes IMPACT Health Care grants to the following types of organizations:

- Organizations recognized by the IRS as a 501(c)(3) nonprofit
- Public agencies, including state and local governments (for example, health departments). A public entity may serve as a fiscal agent for a charitable organization or be part of a coalition or consortium applying for funding.

### **Who is not eligible to apply?**

The Blue Foundation does not consider grant requests from:

- Individuals
- Fundraising events or celebrations
- Political or lobbying organizations
- Fraternal, athletic or social organizations
- Religious organizations for religious purposes
- Type III Supporting Organizations
- Private foundations
- Organizations that do not directly serve Floridians

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- Organizations outside Florida
- Organizations to finance health care services through insurance or other coverage mechanisms.

If you have questions about your organization's eligibility, please contact us at 1-800-477-3736, ext. 63215, or [thebluefoundation@bcbsfl.com](mailto:thebluefoundation@bcbsfl.com).

## Amount and length of grants

- Grants are made between \$10,000 and \$100,000.
- Multi-year commitments up to three years may be made, depending upon the request, the need and the funds available, but the total dollar request should not exceed \$100,000.

## How often can we apply?

- Organizations are limited to one application per 12-month period for the IMPACT Health Care grants program.
- Accredited colleges, universities, and community colleges may submit one proposal per school or college per 12-month period.
- Current IMPACT Health Care grantees may not apply again until their grant is expiring.

## Other

- Materials such as videos, reports and publications should be submitted ONLY at our request.
- Appointments for presentations or on-site visits will be scheduled only at our request.
- Because of the large number of proposals we anticipate receiving, we will not have an opportunity to discuss with you at length your proposal ideas before submission.
- Proposals become the property of The Blue Foundation for a Healthy Florida and will NOT be returned to the applicant.
- The Blue Foundation for a Healthy Florida reserves the right to share the requests with Blue Cross and Blue Shield of Florida or other unaffiliated grantmaking institutions. We make no representations or warranties regarding whether or not those organizations will fund your proposals.

## The Application Process

The Blue Foundation for a Healthy Florida has launched an online application process beginning with the Winter 2009 grant cycle for the Improving Access to Health Care grants program (formerly, competitive or responsive grants). If you cannot complete an online application, please contact us at 1-800-477-3736, ext. 63215, or [thebluefoundation@bcbsfl.com](mailto:thebluefoundation@bcbsfl.com).

## Application Dates

The Blue Foundation accepts grant applications twice per year - mid-March and mid-September. Proposals must be received by 5:00 p.m. on the deadline date. When these dates fall on a holiday or weekend, the deadline will be the next business day.

Winter 2009 - CLOSED. Grants announced January 2010

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Summer 2010 - Opens January 19, 2010. Closes March 12, 2010. Grants announced July 2010.

Winter 2010 - Opens July 15, 2010. Closes September 10, 2010. Grants announced January 2011.

## How to Submit an Application

The online application form walks you through the submission process. Before you begin, we suggest the following steps:

- Check your Internet Browser to make sure it is compatible with The Blue Foundation Online Grant Application. The following are compatible: Internet Explorer 7.0 (for PC); Safari 2.0 (for Mac); Mozilla Firefox 2.0.
- Enable cookies: The Blue Foundation online applications place a cookie on your computer to enable the "Save and Finish Later" functionality. Please check the user's manual for your Internet browser to enable cookies if you receive an error message.
- Know your Employer Identification Number (EIN)/Tax ID. It is required to submit the application. If your organization is new, please contact us at 1-800-477-3736, ext. 63215, or [thebluefoundation@bcbsfl.com](mailto:thebluefoundation@bcbsfl.com).
- Review the Guidelines, Mission and Guiding Principles and focus of our grantmaking.
- Review the Application Overview and gather all of your attachments.
- Download to your computer the Attachment forms and read the instructions. Full instructions for uploading completed attachments are included in the online application form.

## Application Overview

To begin the application process, you will create an online grant application account. You will receive an email notification that includes the email address and password required to access your saved application and account. The email will also include the web address of the Account Login page. The following is the web address for the Account Login page: [https://www.GrantRequest.com/SID\\_1085?S=AM](https://www.GrantRequest.com/SID_1085?S=AM). All applicants must use this address to access your account and continue any saved applications, review submitted applications and/or change email addresses and passwords. If you do not use the above link, you will be prompted to start an entirely new application.

Once you have created your Account login, you may proceed with the application, save and finish later, or review and submit.

You will be able to print a copy of the application as you are filling out the form. Click on the Printer Friendly Version link located in the top right hand corner of each application page.

The application can be completed in one online session or over several sessions. Just click the "Save and Finish Later" button located at the bottom of each application page.

Once the application is completed online, you will click the "Review & Submit" button at the bottom of the last page of the application to submit your application electronically on the Internet. Once your application has been submitted, a confirmation email will be sent to the email address that you used to create your online grant application account.

The information below gives an overview of the questions you will be asked.

- **Eligibility Quiz** - questions related to the eligibility requirements noted in the Guidelines.



- **Cover Sheet** - general information on the organization (date, name, address, etc.).
- **Contact Information** -- for key staff.
- **Organization Information** - includes mission, population served, programs and activities, history and accomplishments, board of directors, annual operating budget and donors.
- **Request Summary** - program/project title, description and costs; amount requested, numbers to be served; communities to be served (geographic area, demographics)
- **Request Narrative** - target population, goals, objectives, activities, outcomes, program staff, dissemination plan, sustainability plan.

All proposals will receive an acknowledgement that includes a tracking number.

## Attachments

The Blue Foundation requires receipt of certain documents before an application can be considered. Please download to your computer the forms required. Following are brief descriptions and acceptable file formats:

- **IRS Tax Status Letter**, or Government Entity Document as an Adobe PDF document (.pdf).
- **Line-Item Budget Form** and **Instructions**. Download and save a copy of the Line-Item Budget Form and Instructions to your computer before completing and attaching to the application.
- **Budget Narrative**. Please attach a brief explanation of each item on the Line-Item Budget Form as a Microsoft Word document (.doc) or Excel spreadsheet (.xls), Adobe PDF document (.pdf) or simple text document (.txt).
- **Operating Budget**. Attach the operating budget (revenues and expenses) for the current fiscal year as a Microsoft Word document (.doc) or Excel spreadsheet (.xls), Adobe PDF document (.pdf) or simple text document (.txt).
- **Financial Statements**. Attach the profit and loss statement and balance sheet for the most recently completed fiscal year as a Microsoft Word document (.doc) or Excel spreadsheet (.xls), Adobe PDF document (.pdf) or simple text document (.txt).
- **Audited Financial Statements**. If available, please attach copy of last/most recent audited financial statements as a Microsoft Word document (.doc) or Excel spreadsheet (.xls), Adobe PDF document (.pdf) or simple text document (.txt).
- **Program/project staff resumes/CVs**. The Blue Foundation requires the resume or curriculum vitae (CV) of the person who will be directing (i.e., ultimately responsible for) the proposed program/project, as well as those of other key staff members/personnel. Please combine all applicable resumes and/or CVs into one document as a Microsoft Word document (.doc) or Excel spreadsheet (.xls), Adobe PDF document (.pdf) or simple text document (.txt).
- **Program/project job descriptions**. The Blue Foundation requires job descriptions for all positions the requested grant will be used to fill/hire. If the requested grant will be used for multiple positions, please combine the job descriptions into one document as a Microsoft Word document (.doc) or Excel spreadsheet (.xls), Adobe PDF document (.pdf) or simple text document (.txt).
- **Empowerment Evaluation Matrix**. Please download and save a copy of the Empowerment Evaluation Matrix and Instructions to your computer before completing and attaching to the application.

## Submit an Application



The Blue Foundation for a Healthy Florida prefers to receive electronic grant applications through our online application form. If you cannot complete an online application, please contact us at 1-800-477-3736, ext. 63215, or [thebluefoundation@bcbsfl.com](mailto:thebluefoundation@bcbsfl.com).



The Blue Foundation for a Healthy Florida and its Parent, Blue Cross and Blue Shield of Florida, are Independent Licensees of the Blue Cross and Blue Shield Association.

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## **The Blue Foundation for a Healthy Florida Sapphire Award Recognizing Community Health Excellence 2009 Nomination Information**

### **Purpose of The Sapphire Award**

The Sapphire Award is designed to recognize and promote excellence in community health programming in Florida. Award winning programs will have demonstrated impact in improving the health-related outcomes of Florida's at-risk populations and communities. The Award's recognition of effective initiatives is meant to promote greater and more lasting support for improved services and systems that can be sustained over time. Strategies that build on community assets, enhance organizational capacity, foster systemic change, and/or lead to lasting policy changes that improve health will be especially sought after for this Award. Successful nominations will support the mission of The Blue Foundation for a Healthy Florida – to enhance access to quality health-related services.

### **Nature of The Sapphire Award and Award Process**

The Sapphire Award recognizes and awards community health programs that have demonstrated success and high merit. It is not a grant program. While there is a financial award, nominations should not be based on the idea of raising funds without regard to recognizing demonstrated success.

The executive director and three persons familiar with the organization are required to nominate the organization for The Sapphire Award.

Up to three "Winners" will be selected annually, each receiving a financial award toward their defined community health objectives, in an amount not to exceed \$120,000 per organization. Other levels of recognition with varying award levels can be identified. In addition, limited promotional support will be made available to help educate the public and various stakeholders about the honored programs.

An independent Selection Committee made up of medical, public health and health communication experts from across Florida and the nation will decide Award honorees and funding levels.

Award announcements will be made at an awards program in late 2009.

## Organization Eligibility

Only organizations deemed eligible by The Blue Foundation for a Healthy Florida will be considered. Criteria include:

- Organizations must have a proven record of improving the health of their community through measurable outcomes in programs involved with health-related services.
- Organizations may be nominated for their health programming in its entirety, or for a single health-focused program. Only one entry from an organization will be accepted during each nomination cycle.
- Organizations must be recognized as nonprofit and tax-exempt under section 501(c)(3) of the Internal Revenue Service Code (IRC) and defined as a public charity under 509(a) 1, or 2, or be a unit of government
- Organizations must officially be located and incorporated in the state of Florida.
- Only completed nominations, meeting all eligibility requirements, will be reviewed for consideration.
- Current and former recipients of grants from The Blue Foundation may be nominated as long as the organization being nominated meets eligibility requirements.
- Organizations named as Finalist, Honorable Mention or Award of Distinction honorees in past competitions are eligible for nomination in 2009 as long as they meet eligibility requirements.
- Organizations named as "Winners" of The Sapphire Award are not eligible for nomination.

## Nominator Eligibility

We respect that nominations take time away from other activity so we want to ensure that this Award's goals are clear. We have attempted to identify below who can and cannot serve as a nominator, and thereby help this program realize its goals in effectively and fairly identifying outstanding community health initiatives.

Nominations can be initiated by:

- The organization, as long as the nomination materials from the other three nominators are created by the nominators themselves. Only one nominator can be from the paid staff of the nominated organization.
- A health professional, volunteer, board member (up to two) or client who knows first-hand the work of the organization.
- A representative of a partnering organization, such as another nonprofit organization or government agency.
- A representative of a foundation, corporation or other funding institution.
- Someone else who has direct knowledge of the work and impact of the organization.

The following cannot serve as nominators:

- More than one paid staff of the nominated organization, including development or public relations staff, consultants, or professional grant writers. In that spirit, we ask that forms not be "ghost written" by others, and that the other three nominators sign their nominations affirming their individual completion of the forms.
- Employees, retirees and board members of The Blue Foundation for a Healthy Florida, Blue Cross and Blue of Florida (BCBSF), or the subsidiaries and affiliates of BCBSF, and their family members.
- Current members of The Sapphire Award Selection Committee.

## **Nomination Format**

For all responses, please:

- Type in 12-point font or clearly print.
- Double space.
- Use one-inch margins.
- Number all pages.
- Number your responses with corresponding question numbers.
- Nominators must sign all pages of their responses.
- Use page lengths as indicated for each response. Longer responses will not be considered.

## **Nomination Components**

The following **MUST** be included in each nomination packet:

- Completed Nominated Organization Form (to be completed by the Nominated Organization).
- Completed Nominator Contact Information Form (to be completed by the Nominated Organization).
- Completed and signed Nominator Forms from the three nominators named in the Nominator Contact Information Form, along with their responses to the questions.
- Most recent audited financial statement of the organization. If the organization does not have an audited financial statement, please provide explanation.
- Current detailed budget for the organization/program being nominated, to include a detailed listing of major funding sources with amounts and percentages.
- Copy of IRS letter stating 501(c)(3) status.
- Copy of roster of Board of Directors with their business affiliations.
- For review purposes, please send three complete sets of all materials.

## **Submission Guidelines**

- The nominated organization will collect all completed and signed nominations and send all materials as a SINGLE PACKET.
- Do NOT place in a binder, and do not use tabs.
- Attachments, such as program brochures, newsletters and news clippings with dates, are not necessary, but may be included if deemed particularly important. Items will NOT be returned.
- Additional letters of reference beyond the three named nominators will not be considered.
- Submitted items will NOT be returned

**Check list**

Please use the following to confirm your nomination package is complete. Please provide three complete sets of all materials, in this order. Do NOT place in a binder; do not use tabs.

- \_\_\_ Nominated Organization Form
- \_\_\_ Nominator Contact Information Form
- \_\_\_ Nominator Forms from the three nominators with their responses behind their completed form
- \_\_\_ Responses to questions from the three nominators and the organization executive
- \_\_\_ Audited financial statement
- \_\_\_ Current detailed budget for the organization and program
- \_\_\_ IRS letter
- \_\_\_ Board of Directors roster with business affiliations

**All materials must be received by no later than 5:00 p.m., May 12, 2009.**

**Send complete packages to:**

Susan Wildes  
The Sapphire Award  
The Blue Foundation for a Healthy Florida  
4800 Deerwood Campus Parkway, DC 3-4  
Jacksonville, FL 32246-8273

Inquiries can be made to.  
TheSapphireAward@bcbsfl.com  
Toll free 1-800-477-3736 ext. 63215, option 2.

Forms are also available at [www.bluefoundationfl.com](http://www.bluefoundationfl.com).

**Honorees of The Sapphire Award will be announced in late 2009.**

The Blue Foundation for a Healthy Florida is the philanthropic affiliate of Blue Cross and Blue Shield of Florida. Its mission is to enhance access to quality health-related services for Floridians, especially the uninsured and underserved. The Blue Foundation for a Healthy Florida and its parent, Blue Cross and Blue Shield of Florida, are independent licensees of the Blue Cross and Blue Shield Association.



The Blue Foundation for a Healthy Florida and its Parent, Blue Cross and Blue Shield of Florida, are independent licensees of the Blue Cross and Blue Shield Association.

**Nominated Organization Form** (To be completed by Nominated Organization)

|  |  |
|--|--|
| Name of organization   |  |
| Employer Identification Number   |  |
| Name of Nominated Program  |  |
| Mailing address  |  |
| Main Telephone Number  |  |
| Main Fax Number  |  |
| Web Site   |  |
| Name and Title of Organization Executive                                 |  |
| Phone and Fax Numbers of Organization Executive                          |  |
| Email Address of Organization Executive                                  |  |
| Name and Title of Program Director                                       |  |
| Phone and Fax Numbers of Program Director                                |  |
| Email Address of Program Director  |  |
| Organization's operating budget for the current fiscal year              |  |
| Program's operating budget for the current fiscal year                   |  |
| In what year was the organization established?                           |  |
| In what year was the nominated health-related program first implemented? |  |

**Nominated Organization Form** (To be completed by Nominated Organization)

|  |  |
|--|--|
| <b>Nominator Number 1</b>  |  |
| Name   |  |
| Relationship with the nominated organization (board member, volunteer, client, etc.) |  |
| Address  |  |
| Business Affiliation (if applicable)   |  |
| Title (if applicable)  |  |
| Telephone Number(s)<br>(specify work/home/cell)                                      |  |
| Email Address  |  |

|  |  |
|--|--|
| <b>Nominator Number 2</b>  |  |
| Name   |  |
| Relationship with the nominated organization (board member, volunteer, client, etc.) |  |
| Address  |  |
| Business Affiliation (if applicable)   |  |
| Title (if applicable)  |  |
| Telephone Number(s)<br>(specify work/home/cell)                                      |  |
| Email Address  |  |

|  |  |
|--|--|
| <b>Nominator Number 3</b>  |  |
| Name   |  |
| Relationship with the nominated organization (board member, volunteer, client, etc.) |  |
| Address  |  |
| Business Affiliation (if applicable)   |  |
| Title (if applicable)  |  |
| Telephone Number(s)<br>(specify work/home/cell)                                      |  |
| Email Address  |  |



**Nominated Organization Form** (To be completed by each of the three nominators)

|  |  |
|--|--|
| Name of Nominated Organization and Program   |  |
| Your Name (Nominator)  |  |
| Your Business or Organization (if applicable)  |  |
| Title (if applicable)  |  |
| Address  |  |
| Phone Numbers (specify work, home, cell)   |  |
| Email  |  |
| Are you directly involved in the nominated organization?   | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If you are involved, please indicate your role and the years you have been involved.   |  |
| <input type="checkbox"/> Board Member  | Years Involved:  |
| <input type="checkbox"/> Advisory Board Member   | Years Involved:  |
| <input type="checkbox"/> Staff Member  | Years Involved:  |
| <input type="checkbox"/> Volunteer   | Years Involved:  |
| <input type="checkbox"/> Consumer, patient, client   | Years Involved:  |
| <input type="checkbox"/> Other (please indicate role and years involved)   |  |
| If you are not now or have never been directly involved with the nominated organization, please indicate how you know of their work  |  |
| How did you learn about The Blue Foundation for a Healthy Florida Sapphire Award?  |  |
| With my signature, I am formally affirming that I have personally written this nomination in my words and that I understand that nomination comments may be used for program promotional purposes. |  |
| Signature  |  |
| Date   |  |

**Responses to numbers 1 and 2 are to be provided by the nominated organization only.**

1. What are the goals of the organization or program being nominated? What are the characteristics in place to meet each of these goals, including the quality indicators, standards of care, best-known interventions, and continuum of care, and how do you track/monitor these characteristics? Maximum: 2 pages.
2. Describe the community or population being served. Please be as specific as possible with factual data about the size and type of the community or population served and its demographics, including, but not limited to race, ethnicity, gender, age range, urban/suburban/rural, economic level and insurance status. If multiple major services are provided related to the organization/program being nominated, please provide background about each target population receiving services, identifying numbers of clients (noting unduplicated/duplicated numbers where relevant), what services they receive and over what period. Identify typical client needs and conditions, and client tracking strategies. Maximum: 2 pages.

**Responses to Numbers 3, 4 and 5 are to be provided by each of the three nominators and the nominated organization.**

We understand and respect that some nominators may not have adequate information with which to respond to these questions. Therefore, please state in your own words why you believe this organization/program is successful in meeting its goals, and provide examples you feel most appropriate.

3. Please explain how this organization/program is successful. Maximum: 3 pages.  
State as factually as you can exactly how this organization/program is successful, noting clear, demonstrated evidence of success, including:
  - A. The impacts on patients, clients, consumers, the community or other organizations.  
Please include data.
  - B. Whether the organization/program is based, at least in part, on a program or practice that has been proven successful through formal evaluation or use elsewhere. If so, please identify the organization(s), program(s), practice(s) and/or study(ies) upon which the nominated organization/program is based.
  - C. Specific indicators and/or outcomes that the organization/program uses to track and/or measure success. Provide all relevant patient tracking data, numbers and outcomes (distinguish between duplicated and non-duplicated); baselines; percentages; time periods being evaluated; and how you track the outcomes. Please provide numbers and percentages.

NOTE Specific information about client goals, tracking, and data collection to demonstrate success is critical for reviewers to understand the validity of claims about impact. Examples might include, but are not limited to. specific data such as annual increases in youth immunization rates, control of hypertension by reductions in adult blood pressure at check up intervals, reduction in obesity and diabetes risk by weight and blood sugar control (HA1c testing), control of asthma noted by reduction in annual emergency room visits and sick days, indicators of compliance in taking medications or maintaining sobriety, etc. Sometimes programs show success in helping change or refine health-related public policies or established standards of practice. Please indicate if and how the program played a role leading to such changes. In some cases, non-health-based strategies are used to ensure that health and broader outcomes are achieved, such as approaches to improve affordable housing, childcare availability, legal services and other elements that may be part of strategies for success.

D. The organization/program in terms of strategies to ensure high quality of care. This might involve use of objectively proven standards of medical care, public health strategies of access, receipt of various professionally recognized accreditations, tested strategies for assisting people of diverse backgrounds in terms of language, culture, flexible scheduling, physical/psychological/emotional challenges, etc.

E. Whether the organization/program or its elements have been used as a demonstration site and/or model for replication elsewhere. Please provide program name, location and contact information.

F. Whether the organization/program has been a catalyst for positive change or has leveraged significant resources that magnified impact. Some examples might include: substantially increasing general or expert volunteerism; improving access to transportation, which results in better patient compliance to make medical appointments; linkages to job training for adults or structured out-of-school activities for youth; obtaining free or significantly reduced pharmaceuticals or medical procedures; setting a precedent for focusing on a type of needed community service.

4. Please provide one or two examples of how this program has overcome obstacles to success.  
Maximum: 2 pages

5. Is there anything else about this program you want to convey, such as what makes it so exceptional and/or beneficial that you are motivated to nominate it? Maximum: 1 page

Complete the Nominator Form and place in front of your completed responses and forward to the nominated organization

Inquiries can be made to [TheSapphireAward@bcbsfl.com](mailto:TheSapphireAward@bcbsfl.com), or toll free 1-800-477-3736, ext. 63215.

## **The Sapphire Award Honorees**

### **2008**

#### Winners (\$100,000 each)

All 'Bout Children, West Palm Beach  
Memorial Foundation, Hollywood

#### Award of Distinction (\$75,000 each)

Bay Cares, Panama City  
Capital Medical Society Foundation We Care Network, Tallahassee

#### Honorable Mention (\$25,000)

Charlotte Behavioral Health Care, Healthy Families of Charlotte County, Punta Gorda

### **2007**

#### Winner (\$100,000)

Shands Vista PALS (Partners In Adolescent Lifestyle Support) Program, Gainesville

#### Award of Distinction (\$75,000 each)

Epilepsy Foundation of Florida, Miami  
HUG-Me (Help Understand and Guide Me, Orlando  
Lakeland Volunteers In Medicine, Lakeland

#### Honorable Mention (\$25,000)

Big Bend Cares Inc., Tallahassee

### **2006**

#### Winners (\$100,000 each)

ACORN, Brooker  
Kristi House, Miami  
The Bridge of Northeast Florida, Jacksonville

#### Honorable Mention (\$25,000)

Neighborhood Health Clinic, Naples

#### Finalist (\$5,000)

Henderson Mental Health Center COURT Project, Fort Lauderdale

### **2005**

#### Winners (\$100,000 each)

Camillus Health Concern, Miami  
Crisis Center of Tampa Bay  
The Rubin Center for Healthy Aging at Senior Friendship Centers, Sarasota

#### Honorable Mentions (\$15,000 each)

Bay Cares, Inc., Panama City  
Broward Children's Center, Inc., Pompano Beach  
The Lawton and Rhea Chiles Center for Healthy Mothers and Babies, Tampa  
Wayside House, Delray Beach

#### Finalists (\$5,000 each)

Epilepsy Foundation of South Florida, Miami  
Neighborhood Health Clinic, Naples  
We Care, Jacksonville

## GRANTS PAID IN 2009

| ATTACHMENT D  |  |                            |  |
|---|--|----------------------------|--|
| The Blue Foundation for a Healthy Florida Inc             |  |                            |  |
| Form 990-PF, Part XV, Line 3a                             |  |                            |  |
| GRANTS/CONTRIBUTIONS PAID DURING 2009                     |  |                            |  |
| (All donees listed are public charities)                  |  |                            |  |
| <u>Payee Name</u>   | <u>Address</u>   | <u>Amount Paid in 2009</u> | <u>Purpose</u>   |
| Acorn Clinic  | 23320 N State Road 235<br>Brooker, FL 32622                  | \$1,500                    | Support medical and dental clinic programs                               |
| Alert Health, Inc   | 660 Northeast 125th Street<br>North Miami, FL 33161          | \$55,000                   | Integrated Preventive Screening Project (IPSP)                           |
| American Cancer Society                                   | 3407 NW 9th Avenue<br>Ft Lauderdale, FL 33309                | \$1,500                    | Support Cancer research, education, advocacy and service                 |
| Ann Storck Center   | 1790 SW 43rd Way<br>Ft Lauderdale, FL 33317                  | \$100,000                  | Support Center's Residential and Adult Services                          |
| Apel Health Services Center Inc                           | 5353 Soutel Drive<br>Jacksonville, FL 32219                  | \$9,000                    | Support community based health, wellness and disease prevention services |
| Bay Medical Center  | 615 N Bonita Ave<br>Panama City, FL 32401                    | \$16,000                   | Bay Medical Center Outreach - St Andrew's Clinic                         |
| Big Bend Cares  | 2001 S Monroe Street<br>Tallahassee, FL 32301                | \$1,500                    | Support HIV/AIDS education and support programs                          |
| Broward Regional Health Planning Council, Inc             | 915 Middle River Drive, Suite 120<br>Ft Lauderdale, FL 33304 | \$50,000                   | Florida Statewide Prevention Quality Indicator (PQI) Initiative          |
| Calhoun County Health Department                          | 19611 State Road 20 W<br>Blountstown, FL 32424               | \$30,000                   | Calhoun County Outreach  |
| Camillus Health Concern, Inc (CHC)                        | 336 N W 5th St<br>Miami, FL 33128                            | \$1,500                    | Support Health Clinic  |
| Camillus Health Concern, Inc (CHC)                        | 336 N W 5th St<br>Miami, FL 33128                            | \$19,000                   | Camillus Courtyard Night Clinic  |
| Capital Medical Society Foundation We Care Dental Network | 1204 Miccosukee Rd<br>Tallahassee, FL 32308                  | \$25,000                   | Support WeCare Dental Program  |
| Cathedral Arts Project, Inc                               | 4063 Salisbury Road, Suite 107<br>Jacksonville, FL 32216     | \$9,000                    | Get up and Dance - EMBRACE   |
| Catholic Charities of Central Florida, Inc                | 1819 North Semoran Boulevard<br>Orlando, FL 32807            | \$50,000                   | Lazarus Free Medical Clinic  |

GRANTS PAID IN 2009

|   |   |          |   |
|---|---|----------|---|
| Children's Volunteer Health Network                       | P O Box 2142<br>Santa Rosa Beach, FL 32459                                      | \$25,000 | Support Health Care Referral and Mobile Dental Programs   |
| Children's Volunteer Health Network                       | P O Box 2142<br>Santa Rosa Beach, FL 32459                                      | \$65,651 | Dental Program  |
| City of Orlando   | 400 S Orange Ave<br>Orlando, FL 32801   | \$12,000 | Embrace Initiative- Get Active Orlando Program  |
| Clara White Mission, Inc                                  | 613 W Ashley St<br>Jacksonville, FL 32202                                       | \$4,760  | Counseling and Education Component for the Clara White Mission Transitional Housing and Vocational Training Program   |
| Clinica Luz Del Mundo (Light of the World Clinic)         | 806 E Prospect Rd<br>Oakland, FL 33334  | \$55,000 | Health Care Outreach  |
| Community Coalition on Homeless Corporation               | 701 17th Ave W<br>Bradenton, FL 34205   | \$50,000 | One Stop Medical and Dental Clinic  |
| Community Connections of Jacksonville, Inc                | 327 E Duval St<br>Jacksonville, FL 32202  | \$9,000  | Embrace Initiative - Support Anti-Obesity Program   |
| Community Health Centers, Inc                             | 110 S Woodland St<br>Winter Garden, FL 34787                                    | \$15,000 | The Diabetes Collaborative Expansion Program  |
| Community Health Services of Manon County, Inc            | 1025 S W 1st Ave<br>Ocala, FL 34471   | \$25,500 | Heart of Florida Health Center - On site mental health services   |
| Comprehensive AIDS Program of Palm Beach County           | 1330 S Congress Avenue<br>Palm Springs, FL 33406                                | \$75,000 | Support 4 Service Outreach Centers  |
| Dade County Dental Research Clinic, Inc                   | 750 NW 20th Street<br>Miami, FL 33127   | \$30,000 | Community Smiles – A volunteer and educational based community dental clinic  |
| DLC Nurse and Learn, Inc                                  | 4101 College Street<br>Jacksonville, FL 32205                                   | \$28,000 | Enhanced Therapy Program  |
| Duval County Health Department                            | 900 University Blvd , N , Ste 205<br>Jacksonville, FL 32211                     | \$40,000 | Partners (Embrace) Coordination of local efforts to address the causes of obesity of children and their families and expansion and enhancement of current local efforts to address obesity prevention in Duval County |
| Duval County Health Department                            | Healthy Jacksonville<br>900 University Blvd N Ste 202<br>Jacksonville, FL 32211 | \$9,000  | Embrace Grant for Nutrition and Chronic Disease Prevention  |
| Easter Seals Society of Volusia and Flagler Counties, Inc | 1219 Dunn Avenue<br>Daytona Beach, FL 32114                                     | \$15,000 | Center for Excellence in Autism Spectrum Disorders  |
| Empowerment Resources, Inc                                | 3832-010 Baymeadows Road,<br>#348<br>Jacksonville, FL 32247                     | \$9,000  | Support Journey Into Womanhood (JIW) Program - Embrace  |
| Faith Health Clinic                                       | P O Box 2508<br>Mananna, FL 32447   | \$35,000 | Full-time ARNP, Diabetes Program, Nutritional Program   |

GRANTS PAID IN 2009

|   |  |           |  |
|---|--|-----------|--|
| Family Nurturing Center of Florida                                      | 1221 King St<br>Jacksonville, FL 32204                     | \$15,000  | Nurturing Parenting Program for Families with Children with Health Issues                    |
| Feeding America   | 35 East Wachter Drive<br>Ste 2000<br>Chicago, IL 60601     | \$250,000 | Feeding America Grant for counties in Florida  |
| Florida Community Health Centers, Inc                                   | 4450 S Tiffany Dr<br>West Palm Beach, FL 33407             | \$42,000  | Health Navigator Program – Clewiston Center  |
| Florida International University - Herbert Wertheim College of Medicine | 1120 SW 8th Street<br>Miami, FL 33199                      | \$1,500   | Support medical education programs   |
| Florida State University Foundation                                     | 2010 Levy Ave<br>Bldg B Suite 300<br>Tallahassee, FL 32310 | \$1,500   | Support research education   |
| Friends of St. Lucie County Public Health, Inc                          | 5150 NW Milner Drive<br>Port St. Lucie, FL 34983           | \$30,000  | St. Lucie County Black American HIV-AIDS Education, Community Outreach Demonstration Program |
| Girls on the Run of Northeast Florida                                   | P O Box 5028<br>Jacksonville, FL 32247                     | \$8,505   | Girls on the run Scholarship Program - Embrace   |
| Good Samaritan Health Centers, Inc                                      | P O Box 1005<br>St. Augustine, FL 32085-1005               | \$33,000  | The Wildflower Clinic, medical/dental facility   |
| Good Samaritan Health Clinic of West Volusia, Inc                       | 312 West New York Avenue<br>Deland, FL 32724               | \$8,000   | Ancillary Diagnostic Services  |
| Hebni Nutrition Consultants, Inc  | 2009 W Central Blvd<br>Orlando, FL 32805                   | \$20,000  | Keeping Your Diet Straight - Embrace   |
| Helping Hands Clinic  | P O Box 1481<br>Gainesville, FL 32602-1481                 | \$28,000  | Health Care for the Homeless   |
| Hispanic Health Initiatives   | P O Box 1925<br>Casselberry, FL 32718                      | \$25,000  | Support Central Florida Outreach Programs  |
| Hispanic Unity of Florida, Inc  | 5840 Johnson St<br>Hollywood, FL 33021                     | \$5,028   | 'We'll Help You' program   |
| Jacksonville Area Sexual Minority Youth Network                         | P O Box 38013<br>Jacksonville, FL 32205                    | \$45,000  | Safety Net Health Access Project   |
| Jacksonville Kids Coalition   | 327 E Duval Street<br>Jacksonville, FL 32202               | \$9,000   | Policy Development and Community Advocacy Training - Embrace                                 |
| Junior League of Jacksonville, Inc                                      | 2165 Park St<br>Jacksonville, FL 32204-3811                | \$945     | CARES Snackivities - Embrace   |
| Kristi House  | 1265 NW 12th Avenue<br>Miami, FL 33136                     | \$13,835  | Mental Health Outreach   |
| Lakeland Volunteers in Medicine   | 1021 Lakeland Hills Blvd<br>Lakeland, FL 33805             | \$46,892  | Women's Health Program   |

GRANTS PAID IN 2009

|   |  |          |  |
|---|--|----------|--|
| Lee's Place   | 216 Lake Ella Drive<br>Tallahassee, FL 32303                 | \$3,000  | Non-profit grief and loss counseling center that provides professional and affordable counseling services to children, family and adults |
| Leon County Health Department                             | 2965 Municipal Way<br>Tallahassee, FL 32304                  | \$19,418 | Assessment of Community and Home Food Environments in Leon County - Embrace  |
| Lupus Foundation of America, Southeast Florida Chapter    | 75 NE 6th Avenue<br>Ste 110<br>Delray Beach, FL 33483        | \$22,000 | W I T (What Is That) -- awareness program for Lupus  |
| MaliVai Washington Kids Foundation                        | 1096 W 6th St<br>Jacksonville, FL 32209                      | \$9,000  | Get Moving Through Tennis! - Embrace   |
| Managed Access to Child Health, Inc (MATCH)               | 910 N Jefferson St<br>Jacksonville, FL 32209                 | \$9,000  | Breastfeeding Collaborative - Embrace  |
| Manatee County Rural Health Services, Inc                 | P O Box 499<br>Parrish, FL 34219                             | \$54,884 | Diabetic Adherence Program   |
| Manon County Children's Advocacy Center, Inc              | 2131 SW 22nd Place<br>Ocala, FL 34474                        | \$76,000 | Child Victim Clinical Program  |
| Miami Beach Community Health Center, Inc                  | 710 Alton Road<br>Miami Beach, FL 33139                      | \$55,000 | Increasing access to primary health care in Little Haiti   |
| MicheLee Puppets, Inc - Embrace                           | 4420 Parkway Commerce Blvd<br>Ste A<br>Orlando, FL 32803     | \$6,000  | Embrace Initiative - Extreme Health Challenge  |
| MicheLee Puppets, Inc                                     | 4420 Parkway Commerce Blvd<br>Ste A<br>Orlando, FL 32803     | \$6,000  | Embrace Initiative - Extreme Health Challenge  |
| Nemours Health and Prevention Services                    | 252 Chapman Rd , Christina Bldg ,Ste 200<br>Newark, DE 19702 | \$20,000 | Nemours Child Care Obesity Prevention Project in Orlando and Jacksonville - Embrace  |
| Nemours Partnership for Children                          | 1600 Rockland Road<br>Wilmington, DE 19803                   | \$1,500  | Support children's health programs   |
| North Broward Hospital District, dba Broward Health       | 303 S E 17th St<br>Fort Lauderdale, FL 33316-2523            | \$18,000 | The Kinship Cares Initiative   |
| Northeast Florida AHEC, Inc                               | 1107 Myra Steet<br>Ste 250<br>Jacksonville, FL 32204         | \$9,000  | Improving Pediatric Primary Care Provider Skills - Embrace   |
| Operation New Hope  | 1830 N Main St<br>Jacksonville, FL 32206                     | \$9,000  | Eastside Community Garden's Healthy Lifestyles Program - Embrace   |
| Orange County Health Department                           | 6101 Lake Ellenor Dr<br>Orlando, FL 32809                    | \$50,000 | Critical Connections   |
| Orange County Health Department                           | 6101 Lake Ellenor Dr<br>Orlando, FL 32809                    | \$5,000  | Critical Connections   |
| Partners In Adolescent Lifestyle Support (PALS)           | 4101 NW 89th Blvd<br>Gainesville, FL 32606                   | \$50,000 | Partners in Adolescent Lifestyle Support   |
| Physician Led Access Network of Collier County, FL (PLAN) | 1012 Goodlette Road North,<br>Suite 201<br>Naples, FL 34102  | \$30,000 | Patient Care Coordinator   |



GRANTS PAID IN 2009

|   |  |          |   |
|---|--|----------|---|
| Prime Time of Palm Beach County                                     | 2300 High Ridge Rd , Ste 330<br>Boynton Beach, FL 33426    | \$25,000 | Embrace Initiative - Project GROW   |
| Rails to Trails Conservancy   | P O Box 15227<br>Tallahassee, FL 32317                     | \$16,000 | Embrace Initiative - Support S-Line and Jax to Baldwin Trail Programs     |
| Refuge House, Inc   | PO Box 20910<br>Tallahassee, FL 32316                      | \$9,000  | Refuge House Wellness Project   |
| San Marco Preservation Society                                      | 1468 Hendricks Avenue<br>Jacksonville, FL 32207            | \$9,000  | Smart Growth Neighborhood Plan and Guidelines for San Marco - Embrace     |
| Seminole County Victim's Rights Coalition, Inc                      | P O Box 471279<br>Lake Monroe, FL 32747-1279               | \$9,500  | SafeHouse Emergency Medical Plan  |
| Senior Friendship Centers   | 1888 Brother Geenan Way<br>Sarasota, FL 34236              | \$1,500  | Support Aging Services, Activities and Education                          |
| Shepherd's Hope, Inc  | 4851 South Apopka-Vineland Road<br>Orlando, FL 32819       | \$9,000  | Seminole Shepherd's Hope Health Center                                    |
| South Santa Rosa Interfaith Ministries, Inc - Good Samaritan Clinic | 4435 Gulf Breeze Parkway<br>Gulf Breeze, FL 32563          | \$3,000  | Provide medications for the working poor of Santa Rosa County             |
| St Joseph's Children's Advocacy Center                              | 2700 W Martin Luther King, Jr Suite 310<br>Tampa, FL 33607 | \$10,000 | Project PATH (Providing Access to Healthcare) for Children                |
| St Joseph's Children's Advocacy Center                              | 2700 W Martin Luther King, Jr , Ste 310<br>Tampa, FL 33607 | \$5,000  | Project PATH (Providing Access to Healthcare) for Children                |
| St Joseph's Children's Advocacy Center                              | 2700 W Martin Luther King, Jr , Ste 310<br>Tampa, FL 33607 | \$12,000 | Embrace Initiative - Support Mobile Clinic and Project PATH               |
| St Vincent de Paul Community Health Care, Inc                       | P O Box 381193<br>Murdock, FL 33939                        | \$55,000 | Physician Assistant   |
| St Vincent's HealthCare Foundation, Inc                             | 1 Shircliff Way<br>Jacksonville, FL 32203                  | \$3,000  | Migrant Health Outreach Ministry - in Crescent City and Hastings, Florida |
| St Vincent's HealthCare Foundation, Inc                             | 1 Shircliff Way<br>Jacksonville, FL 32203                  | \$9,000  | Way to Go Kids - Embrace  |
| Sulzbacher Center for the Homeless, Beaches Community Healthcare    | 611 E Adams Street<br>Jacksonville, FL 32202               | \$25,000 | Support Beaches Community Health Care Center                              |
| Susan B Anthony Recovery Center, Inc                                | 1633 Poinciana Drive<br>Pembroke Pines, FL 33025           | \$60,900 | Medical Assessment Services for At-Risk Families                          |
| The Bridge of Northeast Florida, Inc                                | P O Box 43126<br>Jacksonville, FL 32203-3126               | \$9,000  | Community Garden and Farmer's Market - Embrace                            |
| The Capital Medical Society Foundation's We Care Network            | 1204 Miccosukee Rd<br>Tallahassee, FL 32308                | \$2,500  | Project Dental Care   |
| The Center for Drug-Free Living, Inc                                | 3670 Maguire Blvd , Ste 200<br>Orlando, FL 32803           | \$40,000 | HepCaN of Central Florida   |

GRANTS PAID IN 2009

|   |   |           |   |
|---|---|-----------|---|
| The Education Fund  | 900 NE 125th St , Ste 110<br>North Miami, FL 33161-5745                   | \$1,000   | Embrace - Support Collaborative Nutrition Initiative  |
| The Education Fund  | 900 NE 125th St , Ste 110<br>North Miami, FL 33161-5745                   | \$100,000 | Support Collaborative Nutrition Initiative  |
| The Farmworker Association of Florida, Inc                                    | 1264 Apopka Blvd<br>Apopka, FL 32703                                      | \$20,000  | The Partnering with Providers Project   |
| The Farmworker Association of Florida, Inc                                    | 815 S Park Ave<br>Apopka, FL 32703  | \$10,000  | The Partnering with Providers Project   |
| The Farmworker Association of Florida, Inc                                    | 1264 Apopka Blvd<br>Apopka, FL 32703                                      | \$50,000  | The Partnering with Providers Project   |
| The Health Council of East Central Florida, Inc                               | 1155 South Semoran<br>Boulevard, Suite 1111<br>Winter Park, FL 32792-5505 | \$10,000  | Embrace Initiative - Healthcare treatment programs  |
| The Health Council of East Central Florida, Inc                               | 1155 South Semoran<br>Boulevard, Suite 1111<br>Winter Park, FL 32792-5505 | \$60,000  | Obesity of children and their families - expansion and enhancement of current local efforts to address obesity prevention in East Central Florida |
| The Health Planning Council of Northeast Florida, Inc                         | 644 Cesery Blvd , Ste 210<br>Jacksonville, FL 32211                       | \$6,526   | Coordination of local efforts to address the causes of childhood obesity in Jacksonville, FL  |
| The Way Free Medical Clinic   | 4915 Harvey Grant Road<br>Orange Park, FL 32003                           | \$20,000  | Women's Health Care Program   |
| UNIDAD of Miami Beach, Inc  | 1701 Normandy Drive<br>Miami Beach, FL 33141                              | \$50,000  | Miami Beach Children's Oral Health Initiative   |
| University of Central Florida Research Foundation                             | 12201 Research Pkwy , Ste 501<br>Orlando, FL 32826-3246                   | \$40,000  | Support Center for Nursing  |
| University of Florida Foundation  | P O Box 14425<br>Gainesville, FL 32604                                    | \$1,500   | Support research and education  |
| University of Florida Foundation on behalf of the UF Department of Psychology | P O Box 112250<br>Gainesville, FL 32611                                   | \$15,000  | Embrace Initiative - Support "Family Health Self-Empowerment Program"   |
| University of Florida Institute for Food and Agricultural Sciences            | 3028 McCarthy Hall D<br>P O Box 110310<br>Gainesville, FL 32611           | \$60,000  | Organ Wise Guys Comprehensive School Program - Embrace  |
| University of Florida, Department of Clinical & Health Psychology             | P O Box 100165<br>Gainesville, FL 32610-0165                              | \$15,000  | Improving Patient Care Providing Services to Pediatric Pulmonary Families   |
| University of Florida, Department of Clinical & Health Psychology             | P O Box 100165<br>Gainesville, FL 32610-0165                              | \$10,000  | Improving Patient Care Providing Services to Pediatric Pulmonary Families   |

**GRANTS PAID IN 2009**

|   |  |                    |   |
|---|--|--------------------|---|
| University of North Florida, Brooks College of Health                               | J Brooks Brown Hall, Bldg 39, 1 UNF Dr Jacksonville, FL 32224  | \$9,000            | Pediatnc Obesity Treatment and Prevention                                     |
| University of South Florida Chiles Center   | 3111 E Fletcher Ave Tampa, FL 33613  | \$1,500            | Support health programs   |
| University of South Florida Research Foundation, Division of Sponsored Research Inc | Department of Comm and Family Health College of Public Health 13201 Bruce B Downs Blvd , MDC 56 Tampa, FL 33612-9446 | \$20,000           | Quality of Healthcare for Florida's Children and Adolescents Focus on Obesity |
| Urban League of Greater Miami   | 8500 N W 25th Avenue Miami, FL 33147   | \$20,000           | Asthma Intervention & Relief (AIR) Program                                    |
| Vision Is Priceless Council   | 1820 Barrs Street, Suite 546 Jacksonville, FL 32204  | \$40,000           | Cared Vision Outreach Program   |
| Volunteers in Medicine Clinic   | 417 Balboa Avenue Stuart, FL 34994   | \$15,000           | Promoting Healthy Self Management of Diabetes                                 |
| Volunteers in Medicine Clinic   | 417 Balboa Ave Stuart, FL 34994  | \$10,000           | Promoting Healthy Self Management of Diabetes                                 |
| Wakulla County Health Department  | 48 Oak St Crawfordville, FL 32327  | \$20,000           | Referral Based System Coordination  |
| War on Poverty - Florida, Inc   | 5196-A Norwood Ave Jacksonville, FL 32208  | \$20,000           | Building a Healthy -Childhood Obesity Prevention Project - Embrace            |
| We Care of Polk County  | 5110 S Florida Avenue, #111 Lakeland, FL 33813   | \$12,000           | Pharmaceutical Services   |
| Women of HOPE   | P O Box 292705 Davie, FL 33329   | \$1,500            | Support Health Education Programs   |
| WomanKind, Inc  | 3142 Northside Drive, Suite 101 Key West, FL 33040   | \$20,300           | WomanKind Mental Health Counseling Program                                    |
| YMCA of Florida's First Coast   | 12735 Gran Bay Pkwy , Ste 250 Jacksonville, FL 32258   | \$9,000            | Healthy Tigers - Embrace  |
| <b>TOTAL GRANTS/CONTRIBUTIONS PAID IN 2009:</b>                                     |  | <b>\$2,888,644</b> |   |

## ATTACHMENT E

The Blue Foundation for a Healthy Florida Inc

Form 990-PF, Part XV, Line 3a

## GRANTS/CONTRIBUTIONS APPROVED IN 2009 BUT NOT PAID BY 12/31/09

(All donees listed are public charities)

| <u>Payee Name &amp; Address</u>  | <u>Purpose</u>   | <u>Amount Approved in 2009<br/>But Not Yet Paid by 12/31/09</u> |
|--|--|---|
| Barnabas Center, Inc.<br>11 South 11th St.<br>Fernandina Beach, FL 32034                             | Barnabas Dental Clinic   | \$40,797  |
| Bay Medical Center - St. Andrew's Clinic<br>615 N. Bonita Avenue<br>Panama City, FL 32401            | Medical supplies and medications<br>for patients at St Andrews Clinic  | \$80,000  |
| Bridgeway Center Inc<br>137 Hospital Dr.<br>Fort Walton Beach, FL 32548                              | Integrated Care Program  | \$77,569  |
| Broward Health<br>303 SE 17th Street<br>Ft. Lauderdale, FL 33316-2523                                | Kinship Cares Initiative - case<br>management  | \$42,000  |
| Camillus House Inc<br>336 NW 5th Street<br>Miami, FL 33128   | Support walk-in clinic   | \$79,700  |
| Caridad Center<br>8645 W. Boynton Beach Blvd<br>Boynton Beach, FL 33472                              | Caridad Health Clinic Quality<br>Assurance Program   | \$75,000  |
| Center for Health Equity, Inc., The<br>231 E. Jefferson St.<br>Quincy, FL 32351-2426                 | Outreach Medical & Nutrition<br>Program  | \$66,000  |
| Children's Volunteer Health Network<br>P. O. Box 2142<br>Santa Rosa Beach, FL 32459                  | Pre-K thru 3rd grade restorative<br>dental care  | \$49,360  |
| Community Coalition on Homeless Corp.<br>701 17th Avenue West<br>Bradenton, FL 34205                 | full time clinic coordinator and part-<br>time dental assistant for medical<br>and dental clinic               | \$50,000  |
| Dade County Dental Research Clinic, Inc.<br>750 NW 20th St.<br>Miami, FL 33127                       | Community Smiles Improving<br>Smiles Project   | \$100,000   |
| Good Samaritan Health Clinic of Pasco, Inc.<br>5334 Aspen St.<br>New Port Richey, FL 34652           | Restorative Dental Clinic  | \$63,932  |
| Haitian American Association Against<br>Cancer, Inc.<br>225 NE 34th St., Ste. 208<br>Miami, FL 33137 | The Breast and Cervical Cancer<br>Early Detection and Prevention for<br>Haitian Women in Miami-Dade<br>Project | \$50,000  |

**2009 Grants Approved but not paid by 12-31-09**

|   |   |                    |
|---|---|--------------------|
| Heart of Florida Health Center Inc<br>1025 SW 1st Avenue<br>Ocala, FL 34471                       | Community health education,<br>evaluation and mental health<br>prevention | \$24,500           |
| Lakeland Volunteers in Medicine<br>1021 Lakeland Hills Blvd.<br>Lakeland, FL 33805                | Something to Smile About  | \$100,000          |
| Mission House, Inc.<br>800 Shetter Ave.<br>Jacksonville Beach, FL 32250                           | Mission House Clinic  | \$48,000           |
| Partners In Adolescent Lifestyle Support<br>(PALS)<br>4101 NW 89th Blvd.<br>Gainesville, FL 32606 | Outreach for teens in Gainesville<br>schools                              | \$50,000           |
| Shepherd's Hope, Inc.<br>4851 S. Apopka Vineland Rd.<br>Orlando, FL 32819                         | Healthy Seminole-Specialty Care<br>Program                                | \$100,000          |
| Tallahassee Memorial HealthCare<br>Foundation<br>1331 E. 6th Ave.<br>Tallahassee, FL 32303        | TMH Family Medicine Residency<br>Improved Pregnancy Outcomes<br>Clinics   | \$75,305           |
| Wakulla County Health Department<br>48 Oak Street<br>Crawfordville, FL 32327                      | Public health services coordinator  | \$80,000           |
| <b>Total Grants Approved During 2009 but Not Yet Paid at 12/31/09:</b>                            |   | <b>\$1,252,163</b> |

## ATTACHMENT F

The Blue Foundation for a Healthy Florida Inc.

EIN: 59-3707820

2009 Form 990-PF

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Question 5c

### Statement Required by Reg. Sec. 53.4945-5(d)

- Grantee: BayCares Inc., 597 W. 11<sup>th</sup> Street, Panama City, FL 32401
- Date and Amount Paid: 10/20/08 paid \$1,500; 12/5/08 paid \$75,000;  
Total paid during 2009 = \$ 0 (none).
- Purpose: Support the BayCares Healthcare Access Program
- Amount of grant spent by grantee (based on most recent report received from the grantee) = \$54,113
- Diversion: Based on the report furnished by the grantee, no part of the grant has been used for other than its intended purpose.
- Date of report received from grantee: 3/23/2010
- Date and results of any verification of grantee's reports [IRC Reg. Sec. 53.4945-5 (c)(1)]: N/A (The Blue Foundation did not conduct any independent verification of the grantee's reports, as it had no reason to doubt their accuracy or reliability.)