

Form **990**Department of the Treasury  
Internal Revenue Service**Return of Organization Exempt From Income Tax**

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

OMB No. 1545-0047

**2010**Open to Public  
Inspection

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

**A** For the 2010 calendar year, or tax year beginning **OCT 1, 2010** and ending **SEP 30, 2011****B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization**THE CONSERVANCY OF SOUTHWEST FLORIDA**

Doing Business As

Number and street (or P.O. box if mail is not delivered to street address)

**1450 MERRIHUE DRIVE**

Room/suite

City or town, state or country, and ZIP + 4

**NAPLES, FL 34102****F** Name and address of principal officer: **ANDREW MCELWAIN**  
**SAME AS C ABOVE****D** Employer identification number**59-1157084****E** Telephone number**239-262-0304****G** Gross receipts \$**23,342,277.****H(a)** Is this a group return

for affiliates?

☐ Yes ☒ No**H(b)** Are all affiliates included?☐ Yes ☐ No

If "No," attach a list. (see instructions)

**H(c)** Group exemption number ▶**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ **WWW.CONSERVANCY.ORG****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: **1964** **M** State of legal domicile: **FL****Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>THE MISSION OF THE CONSERVANCY OF SOUTHWEST FLORIDA IS TO PROTECT SOUTHWEST FLORIDA'S UNIQUE</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>25</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>25</b>
	<b>5</b> Total number of individuals employed in calendar year 2010 (Part V, line 2a)	<b>5</b>	<b>61</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>500</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>376,161.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 34	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>7,148,657.</b>	<b>16,839,064.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>151,892.</b>	<b>131,338.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>177,977.</b>	<b>496,552.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>300,621.</b>	<b>434,045.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>7,779,147.</b>	<b>17,900,999.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>822,132.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>0.</b>	<b>0.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>2,509,521.</b>	<b>2,732,844.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>760,624.</b>	<b>66,855.</b>	<b>0.</b>
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	<b>1,746,670.</b>	<b>2,020,391.</b>
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>4,323,046.</b>	<b>5,575,367.</b>
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>3,456,101.</b>	<b>12,325,632.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>30,423,010.</b>	<b>42,926,935.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>895,730.</b>	<b>1,714,471.</b>
		<b>29,527,280.</b>	<b>41,212,464.</b>

**Part II Signature Block**

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

<b>Sign Here</b>	Signature of officer		Date	
	<b>VICTORIA POLLOCK, CFO</b>			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>
	<b>AMELIA COOPER CPA</b>	<b>AMELIA COOPER CPA</b>	<b>06/04/12</b>	<b>PTIN</b>
	Firm's name ▶ <b>CLIFTONLARSONALLEN LLP</b>	Firm's EIN ▶		
	Firm's address ▶ <b>4099 TAMiami TRAIL N., STE. 300 NAPLES, FL 34103</b>	Phone no. <b>239-262-8686</b>		

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

032001 02-22-11

LHA For Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2010)**SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION**

**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response to any question in this Part III ☒

- 1 Briefly describe the organization's mission:  
**THE MISSION OF THE CONSERVANCY OF SOUTHWEST FLORIDA IS TO PROTECT SOUTHWEST FLORIDA'S UNIQUE NATURAL ENVIRONMENT AND QUALITY OF LIFE NOW AND FOREVER. THE CONSERVANCY IS A GRASSROOTS ORGANIZATION FOCUSED ON THE CRITICAL ENVIRONMENTAL ISSUES OF THE SOUTHWEST FLORIDA REGION. WE**
- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No  
 If "Yes," describe these new services on Schedule O.
- 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No  
 If "Yes," describe these changes on Schedule O.
- 4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.
- 4a (Code: ) (Expenses \$ 906,556. including grants of \$ ) (Revenue \$ 242,143.)  
**CONSERVANCY OF SOUTHWEST FLORIDA ENVIRONMENTAL POLICY AND ADVOCACY: ENSURING THAT OUR REGION'S LEADERS HAVE THE TOOLS TO MAKE INFORMED DECISIONS IS A CRITICAL ROLE OF THE CONSERVANCY OF SOUTHWEST FLORIDA. THE ENVIRONMENTAL POLICY AND ADVOCACY TEAM ENSURES THE PROPER STEWARDSHIP OF SOUTHWEST FLORIDA'S WATER, LAND AND WILDLIFE. THE TEAM USES A SCIENCE-BASED APPROACH TO TACKLE BROAD REGIONAL ENVIRONMENTAL ISSUES AND COLLABORATES WITH PARTNERS SUCH AS BUSINESS, ENVIRONMENTAL, ACADEMIC AND GOVERNMENT LEADERS. SUSTAINABLE DEVELOPMENT, SMART GROWTH, WATER ISSUES AND WILDLIFE AND WILDLIFE HABITAT PROTECTION ARE THE MAIN FOCUS FOR THE POLICY TEAM. SPECIFIC INITIATIVES INCLUDE:**  
 - WORKING TO REDUCE POLLUTION IN OUR BAYS, RIVERS AND ESTUARIES BY
- 4b (Code: ) (Expenses \$ 2,182,290. including grants of \$ ) (Revenue \$ 119,131.)  
**CONSERVANCY OF SOUTHWEST FLORIDA EDUCATION DEPARTMENT AND NATURE CENTER:**  
**THE CONSERVANCY OF SOUTHWEST FLORIDA BELIEVES IN DEVELOPING THE ENVIRONMENTAL LEADERSHIP OF TOMORROW. WE ENSURE THAT BOTH CHILDREN AND ADULTS UNDERSTAND THE BEAUTY AND IMPORTANCE OF OUR UNIQUE NATURAL RESOURCES AND HOW TO ADDRESS THE CRITICAL ENVIRONMENTAL ISSUES FACING OUR REGION. THROUGH OUR WORK, WE HOPE TO EQUIP OUR COMMUNITY WITH THE KNOWLEDGE AND UNDERSTANDING TO MAKE A DIFFERENCE FOR THE ENVIRONMENT. OUR TEAM OF NATURALISTS PROVIDES EDUCATION BY:**  
 - WORKING WITH LOCAL SCHOOLS TO PROVIDE AGE APPROPRIATE ENVIRONMENTAL LEARNING PROGRAMS, REACHING APPROXIMATELY 4907 STUDENTS IN 2009-10 WITHIN THE SCHOOLS, K THROUGH 8.
- 4c (Code: ) (Expenses \$ 572,746. including grants of \$ ) (Revenue \$ 225,835.)  
**CONSERVANCY OF SOUTHWEST FLORIDA ENVIRONMENTAL SCIENCE AND RESEARCH: THE CONSERVANCY OF SOUTHWEST FLORIDA ENVIRONMENTAL SCIENCE DIVISION WORKS ACROSS A WIDE RANGE OF PROJECTS, BOTH PUBLIC AND PRIVATE, ALL FOCUSED ON UNDERSTANDING HOW TO PROTECT OUR WATER, LAND AND WILDLIFE. FROM SINGLE HOMEOWNERS ASSOCIATIONS TO THE FEDERAL GOVERNMENT, THE DIVISION'S DIVERSE EXPERIENCE ENSURES A COMPREHENSIVE, BROAD LOOK AT SOUTHWEST FLORIDA'S ENVIRONMENTAL CHALLENGES. BEGINNING WITH ITS LANDMARK STUDY OF NAPLES BAY IN 1979, THE CONSERVANCY ENVIRONMENTAL SCIENCE DIVISION'S EXPERIENCE ENCOMPASSES LAB TESTING THROUGH LARGE FIELD STUDIES. THE DIVISION IS RECOGNIZED FOR ITS CAPABILITIES AND EXPERTISE IN SOUTHWEST FLORIDA ECOSYSTEMS, HABITATS AND SPECIES.**
- 4d Other program services. (Describe in Schedule O.)  
 (Expenses \$ 705,099. including grants of \$ ) (Revenue \$ 40,781.)
- 4e **Total program service expenses** 4,366,691.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	X	
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	X	
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V	X	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI	X	
b Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	X	
c Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	X	
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	X	
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		X
20a Did the organization operate one or more hospitals? If "Yes," complete Schedule H		X
b If "Yes" to line 20a, did the organization attach its audited financial statements to this return? <b>Note.</b> Some Form 990 filers that operate one or more hospitals must attach audited financial statements (see instructions)		

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

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

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**Part V** Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response to any question in this Part V ☐

	Yes	No
<b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	20
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X
<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	61
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. (see instructions)	2b	X
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
<b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b	X
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
<b>b</b> If "Yes," enter the name of the foreign country: See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
<b>c</b> If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c	
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?	6a	X
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X
<b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	X
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
<b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year	7d	
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	X
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	X
<b>8 Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8	
<b>9 Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b> Did the organization make any taxable distributions under section 4966?	9a	
<b>b</b> Did the organization make a distribution to a donor, donor advisor, or related person?	9b	
<b>10 Section 501(c)(7) organizations.</b> Enter:		
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12	10a	
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
<b>11 Section 501(c)(12) organizations.</b> Enter:		
<b>a</b> Gross income from members or shareholders	11a	
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a	
<b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.	13a	
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
<b>c</b> Enter the amount of reserves on hand	13c	
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
<b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b	

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

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

**Section A. Governing Body and Management**

	1a	1b	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	25			
b Enter the number of voting members included in line 1a, above, who are independent		25		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?				X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?			X	
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?				X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?				X
6 Does the organization have members or stockholders?			X	
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?			X	
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?				X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a The governing body?			X	
b Each committee with authority to act on behalf of the governing body?			X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O				X

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

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

**Section C. Disclosure**

- 17 List the states with which a copy of this Form 990 is required to be filed **FL, PA**
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.  
☐ Own website ☒ Another's website ☒ Upon request
- 19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: **VICTORIA POLLOCK - 239-403-4202**  
**1450 MERRIHUE DRIVE, NAPLES, FL 34102**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response to any question in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
ROBERT L. HEIDRICK CHAIRMAN OF BOARD	10.00	X		X				0.	0.	0.
ANDREW D. HILL VICE CHAIRMAN	5.00	X		X				0.	0.	0.
WILSON BRADSHAW TREASURER	5.00	X		X				0.	0.	0.
DENNIS BROWN SECRETARY	5.00	X		X				0.	0.	0.
DAWN ALLYN DIRECTOR	5.00	X						0.	0.	0.
SUE DALTON DIRECTOR	5.00	X						0.	0.	0.
NANCY WHITE DIRECTOR	5.00	X						0.	0.	0.
TED CORBIN DIRECTOR	5.00	X						0.	0.	0.
PAUL CORDDRY DIRECTOR	5.00	X						0.	0.	0.
JOHN D. FUMAGALLI DIRECTOR	5.00	X						0.	0.	0.
GEORGE GIBSON DIRECTOR	5.00	X						0.	0.	0.
JOHN HALL DIRECTOR	5.00	X						0.	0.	0.
KEN KRIER DIRECTOR	5.00	X						0.	0.	0.
LOIS KELLEY DIRECTOR	5.00	X						0.	0.	0.
ANNE DRACKETT THOMAS DIRECTOR	5.00	X						0.	0.	0.
JAY TOMPKINS DIRECTOR	5.00	X						0.	0.	0.
LISA MERRITT DIRECTOR	5.00	X						0.	0.	0.



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

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
TUCKER TYLER DIRECTOR	5.00	X						0.	0.	0.
JANE PEARSALL DIRECTOR	5.00	X						0.	0.	0.
LYNN SLABAUGH DIRECTOR	5.00	X						0.	0.	0.
PATSY SCHROEDER DIRECTOR	5.00	X						0.	0.	0.
LYNNE SHOTWELL DIRECTOR	5.00	X						0.	0.	0.
JEANNIE SMITH DIRECTOR	5.00	X						0.	0.	0.
GENE WINDFELDT DIRECTOR	5.00	X						0.	0.	0.
IAN WRIGHT DIRECTOR	5.00	X						0.	0.	0.
ANDREW MCELWAIN CEO	60.00			X				171,600.	0.	0.
<b>1b Sub-total</b>								171,600.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b>								224,978.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								396,578.	0.	0.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **10**

**3** Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

	Yes	No
<b>3</b>		X
<b>4</b>	X	
<b>5</b>		X

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

**5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation
HEATHERWOOD CONSTRUCTION COMPANY, 8880 TERRENE COURT, BONITA SPRINGS, FL 34135	GENERAL CONTRACTOR	2,708,704.
KUBIK MALTBIE INC, 7000 COMMERCE PARKWAY SUITE, MOUNT LAUREL, NJ 08054	DISPLAY FABRICATION	825,670.
BLUE CROSS BLUE SHIELD P O BOX 660299, DALLAX, TX 75266	HEALTH INS	316,495.
L=ARCHITECHTURE LLC 1020 8TH AVE S SUITE 5, NAPLES, FL 34102	ARCHITECTS	186,490.
HOLE MONTES, 950 ENCOE WAY P O BOX 111629, NAPLES, FL 34110	ENGINEERING	158,808.

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **5**

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2010)





**Part VIII** Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
<b>Contributions, gifts, grants and other similar amounts</b>	<b>1 a</b> Federated campaigns	<b>1a</b>					
	<b>b</b> Membership dues	<b>1b</b>	262,230.				
	<b>c</b> Fundraising events	<b>1c</b>	656,703.				
	<b>d</b> Related organizations	<b>1d</b>					
	<b>e</b> Government grants (contributions)	<b>1e</b>	362,317.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1f</b>	15,557,814.				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$		74,516.				
	<b>h Total.</b> Add lines 1a-1f			16,839,064.			
<b>Program Service Revenue</b>	<b>2 a</b> PROGRAMS	Business Code	611710	100,467.	100,467.		
	<b>b</b> ADMISSIONS		713990	30,871.	30,871.		
	<b>c</b>						
	<b>d</b>						
	<b>e</b>						
	<b>f</b> All other program service revenue						
	<b>g Total.</b> Add lines 2a-2f			131,338.			
	<b>3</b> Investment income (including dividends, interest, and other similar amounts)			193,143.	193,143.		
<b>4</b> Income from investment of tax-exempt bond proceeds							
<b>5</b> Royalties							
<b>Other Revenue</b>	<b>6 a</b> Gross Rents	(i) Real	12,600.				
	<b>b</b> Less: rental expenses	(ii) Personal					
	<b>c</b> Rental income or (loss)		12,600.				
	<b>d</b> Net rental income or (loss)			12,600.		12,600.	
	<b>7 a</b> Gross amount from sales of assets other than inventory	(i) Securities	4,656,194.	(ii) Other	1,500.		
	<b>b</b> Less: cost or other basis and sales expenses		4,329,529.		24,756.		
	<b>c</b> Gain or (loss)		326665.		-23256.		
	<b>d</b> Net gain or (loss)			303,409.	303,409.		
	<b>8 a</b> Gross income from fundraising events (not including \$ 656,703. of contributions reported on line 1c). See Part IV, line 18	<b>a</b>	504669.				
	<b>b</b> Less: direct expenses	<b>b</b>	504669.				
	<b>c</b> Net income or (loss) from fundraising events			0.			
	<b>9 a</b> Gross income from gaming activities. See Part IV, line 19	<b>a</b>					
	<b>b</b> Less: direct expenses	<b>b</b>					
	<b>c</b> Net income or (loss) from gaming activities						
	<b>10 a</b> Gross sales of inventory, less returns and allowances	<b>a</b>	958485.				
	<b>b</b> Less: cost of goods sold	<b>b</b>	582324.				
	<b>c</b> Net income or (loss) from sales of inventory			376,161.	376,161.		
	<b>Miscellaneous Revenue</b>			Business Code			
<b>11 a</b> OTHER INCOME		900099	45,284.			45,284.	
<b>b</b>							
<b>c</b>							
<b>d</b> All other revenue							
<b>e Total.</b> Add lines 11a-11d			45,284.				
<b>12 Total revenue.</b> See instructions.			17,900,999.	627,890.	376,161.	57,884.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16	822,132.	822,132.		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	396,578.	113,636.	143,911.	139,031.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	1,802,519.	1,425,728.	97,995.	278,796.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits	242,701.	169,895.	26,692.	46,114.
10 Payroll taxes	291,046.	203,732.	32,015.	55,299.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	47,161.		47,161.	
g Other				
12 Advertising and promotion	43,635.	37,917.	1,870.	3,848.
13 Office expenses	203,697.	137,731.	4,065.	61,901.
14 Information technology				
15 Royalties				
16 Occupancy	46,717.	12,007.	8,542.	26,168.
17 Travel	60,450.	55,770.	1,288.	3,392.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	2,776.	2,776.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	187,413.	170,860.	6,897.	9,656.
23 Insurance	194,392.	173,779.	13,053.	7,560.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24f. If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O.)				
a <b>CONTRACTED SERVICES</b>	603,332.	473,136.	34,674.	95,522.
b <b>MAINTENANCE</b>	160,695.	135,163.	11,749.	13,783.
c <b>MATERIALS &amp; SMALL EQUIP</b>	155,425.	131,383.	11,314.	12,728.
d <b>TELEPHONE &amp; UTILITIES</b>	136,519.	122,867.	6,826.	6,826.
e <b>INTERNS</b>	98,094.	98,094.		
f All other expenses	80,085.	80,085.		
25 <b>Total functional expenses.</b> Add lines 1 through 24f	5,575,367.	4,366,691.	448,052.	760,624.
26 <b>Joint costs.</b> Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

**Part X Balance Sheet**

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash - non-interest-bearing	301,306.	1	25,261.
	2 Savings and temporary cash investments	3,081,399.	2	580,876.
	3 Pledges and grants receivable, net	6,620,898.	3	8,294,443.
	4 Accounts receivable, net	17,400.	4	20,095.
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use	125,477.	8	124,828.
	9 Prepaid expenses and deferred charges	140,366.	9	131,496.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 18,216,170.		
	b Less: accumulated depreciation	10b 5,509,689.	10c	12,706,481.
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11	6,738,131.	12	7,482,138.
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	5,067,236.	15	13,561,317.
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	30,423,010.	16	42,926,935.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses	690,712.	17	647,973.
	18 Grants payable		18	
	19 Deferred revenue	151,438.	19	170,725.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties	50,000.	23	893,193.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities. Complete Part X of Schedule D	3,580.	25	2,580.
	26 <b>Total liabilities.</b> Add lines 17 through 25	895,730.	26	1,714,471.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	27 Unrestricted net assets	3,089,348.	27	3,949,246.
	28 Temporarily restricted net assets	16,521,056.	28	26,749,733.
	29 Permanently restricted net assets	9,916,876.	29	10,513,485.
	<b>Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	29,527,280.	33	41,212,464.
34 <b>Total liabilities and net assets/fund balances</b>	30,423,010.	34	42,926,935.	

Form 990 (2010)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response to any question in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	17,900,999.
2	Total expenses (must equal Part IX, column (A), line 25)	2	5,575,367.
3	Revenue less expenses. Subtract line 2 from line 1	3	12,325,632.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	29,527,280.
5	Other changes in net assets or fund balances (explain in Schedule O)	5	-640,448.
6	Net assets or fund balances at end of year. Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	41,212,464.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response to any question in this Part XII ☒

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

Form 990 (2010)

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

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

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

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

OMB No. 1545-0047

**2010**

Open to Public  
Inspection

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number  
59-1157084

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

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

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

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

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2010

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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	6,100,035.	14,244,772.	5,070,821.	7,134,592.	16,839,064.	49,389,284.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
3 The value of services or facilities furnished by a governmental unit to the organization without charge .....						
4 <b>Total.</b> Add lines 1 through 3 .....	6,100,035.	14,244,772.	5,070,821.	7,134,592.	16,839,064.	49,389,284.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						10,142,178.
6 <b>Public support.</b> Subtract line 5 from line 4. ....						39,247,106.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
7 Amounts from line 4 .....	6,100,035.	14,244,772.	5,070,821.	7,134,592.	16,839,064.	49,389,284.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....	138,654.	178,764.	152,527.	145,675.	205,743.	821,363.
9 Net income from unrelated business activities, whether or not the business is regularly carried on .....						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) .....						
11 <b>Total support.</b> Add lines 7 through 10 .....						50,210,647.
12 Gross receipts from related activities, etc. (see instructions) .....					12	6,183,841.

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

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

14 Public support percentage for 2010 (line 6, column (f) divided by line 11, column (f)) .....	14	78.16	%
15 Public support percentage from 2009 Schedule A, Part II, line 14 .....	15	65.80	%
16a <b>33 1/3% support test - 2010.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			<input checked="" type="checkbox"/>
b <b>33 1/3% support test - 2009.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
17a <b>10% -facts-and-circumstances test - 2010.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
b <b>10% -facts-and-circumstances test - 2009.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....			<input type="checkbox"/>

Schedule A (Form 990 or 990-EZ) 2010



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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support</b> (Subtract line 7c from line 6.) .....						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) .....						
<b>13 Total support</b> (Add lines 9, 10c, 11, and 12.) .....						
<b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

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

<b>15</b> Public support percentage for 2010 (line 8, column (f) divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2009 Schedule A, Part III, line 15 .....	<b>16</b>	%

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

<b>17</b> Investment income percentage for 2010 (line 10c, column (f) divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2009 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2010.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization .....

**b 33 1/3% support tests - 2009.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization .....

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



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

Department of the Treasury  
Internal Revenue Service

**Political Campaign and Lobbying Activities**

For Organizations Exempt From Income Tax Under section 501(c) and section 527

OMB No. 1545-0047

**2010**

Open to Public  
Inspection

- ▶ **Complete if the organization is described below.** ▶ **Attach to Form 990 or Form 990-EZ.**  
▶ **See separate instructions.**

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax), or Form 990-EZ, Part V, line 35a (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization <b>THE CONSERVANCY OF SOUTHWEST FLORIDA</b>	Employer identification number <b>59-1157084</b>
---	---

**Part I-A** Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.

2 Political expenditures ..... ▶ \$

3 Volunteer hours .....

**Part I-B** Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 ..... ▶ \$

2 Enter the amount of any excise tax incurred by organization managers under section 4955 ..... ▶ \$

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ..... ☐ Yes ☐ No

4a Was a correction made? ..... ☐ Yes ☐ No

b If "Yes," describe in Part IV.

**Part I-C** Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... ▶ \$

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... ▶ \$

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ..... ▶ \$

4 Did the filing organization file Form 1120-POL for this year? ..... ☐ Yes ☐ No

5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990 or 990-EZ) 2010

LHA

**Part II-A** Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A** Check ☐ if the filing organization belongs to an affiliated group.  
**B** Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b> Total lobbying expenditures to influence public opinion (grass roots lobbying) .....		10,000.													
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying) .....		28,273.													
<b>c</b> Total lobbying expenditures (add lines 1a and 1b) .....		38,273.													
<b>d</b> Other exempt purpose expenditures .....		5,446,673.													
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d) .....		5,484,946.													
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.		424,247.													
<table border="1"> <thead> <tr> <th>If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f) .....		106,062.													
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0- .....		0.													
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0- .....		0.													
<b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? .....			<input type="checkbox"/> Yes <input type="checkbox"/> No												

**4-Year Averaging Period Under Section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) Total
<b>2a</b> Lobbying nontaxable amount	405,103.	388,863.	361,684.	424,247.	1,579,897.
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					2,369,846.
<b>c</b> Total lobbying expenditures	34,511.	29,939.	69,298.	38,273.	172,021.
<b>d</b> Grassroots nontaxable amount	101,276.	97,216.	90,421.	106,062.	394,975.
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					592,463.
<b>f</b> Grassroots lobbying expenditures	23,500.	4,588.	27,298.	10,000.	65,386.

Schedule C (Form 990 or 990-EZ) 2010



**SCHEDULE D**  
(Form 990)Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**▶ Complete if the organization answered "Yes," to Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11, or 12.

▶ Attach to Form 990. ▶ See separate instructions.

OMB No. 1545-0047

**2010**Open to Public  
Inspection

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number

59-1157084

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate contributions to (during year) .....		
3 Aggregate grants from (during year) .....		
4 Aggregate value at end of year .....		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

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

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

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of an historically important land area
<input checked="" type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input checked="" type="checkbox"/> Preservation of open space	

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

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a 1
b Total acreage restricted by conservation easements .....	2b 10.00
c Number of conservation easements on a certified historic structure included in (a) .....	2c 0
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register .....	2d

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

4 Number of states where property subject to conservation easement is located ▶ 1

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☒ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶ 1350

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ 20,355.

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

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

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

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

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 .....	▶ \$
(ii) Assets included in Form 990, Part X .....	▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenues included in Form 990, Part VIII, line 1 .....	▶ \$
b Assets included in Form 990, Part X .....	▶ \$

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

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition  
 b ☐ Scholarly research  
 c ☐ Preservation for future generations  
 d ☐ Loan or exchange programs  
 e ☐ Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV.

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	9,916,876.	9,042,432.	8,084,077.		
b Contributions	596,609.	874,444.	958,355.		
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	10,513,485.	9,916,876.	9,042,432.		

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ☐ %  
 b Permanent endowment ☒ 100.00 %  
 c Term endowment ☐ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations		X
(ii) related organizations		X
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?		

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

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

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		579,046.		579,046.
b Buildings		5,732,915.	4,001,325.	1,731,590.
c Leasehold improvements				
d Equipment		1,481,179.	1,198,136.	283,043.
e Other		10,423,030.	310,228.	10,112,802.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				12,706,481.

Schedule D (Form 990) 2010



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

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely-held equity interests .....		
(3) Other .....		
(A) INVESTMENTS	7,482,138.	END-OF-YEAR MARKET VALUE
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
(I)		
<b>Total.</b> (Col (b) must equal Form 990, Part X, col (B) line 12.) ▶	7,482,138.	

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

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

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

(a) Description	(b) Book value
(1) LAND HELD FOR CONSERVATION	5,061,722.
(2) OTHER RECEIVABLES	69,254.
(3) TRUST RECEIVABLES	8,430,341.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 15.) ▶	13,561,317.

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

1. (a) Description of liability	(b) Amount
(1) Federal income taxes	
(2) SECURITY DEPOSITS	2,580.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 25.) ▶	2,580.

FIN 48 (ASC 740) Footnote. In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740).

**Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	17,900,999.
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	5,575,367.
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	12,325,632.
4	Net unrealized gains (losses) on investments	4	-515,448.
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV.)	8	-125,000.
9	Total adjustments (net). Add lines 4 through 8	9	-640,448.
10	Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9	10	11,685,184.

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

1	Total revenue, gains, and other support per audited financial statements	1	17,213,390.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	-515,448.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV.)	2d	-172,161.
e	Add lines 2a through 2d	2e	-687,609.
3	Subtract line 2e from line 1	3	17,900,999.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	17,900,999.

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

1	Total expenses and losses per audited financial statements	1	5,528,206.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV.)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	5,528,206.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	47,161.
c	Add lines 4a and 4b	4c	47,161.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	5,575,367.

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART II, LINE 9: LAND HELD FOR CONSERVATION: LAND HELD FOR CONSERVATION**

IS RECORDED AT COST WHEN PURCHASED OR AT FAIR MARKET VALUE AT THE DATE OF ACQUISITION, IF DONATED. MANAGEMENT REVIEWS EACH PARCEL PERIODICALLY TO DETERMINE IF THERE HAS BEEN IMPAIRMENT TO THE VALUE THAT IS RECORDED IN THE STATEMENT OF FINANCIAL POSITION.

**PART V, LINE 4: A FUND HELD IN PERPETUITY, THE INCOME FROM WHICH CAN BE SET ASIDE FOR FUTURE PROJECTS AND USES OR USED FOR THE ORGANIZATION'S**

**Part XIV** Supplemental Information (continued)

OVERALL NEEDS.

PART X, LINE 2: THE INTERNAL REVENUE SERVICE HAS DETERMINED THE ORGANIZATION TO BE EXEMPT FROM INCOME TAXES UNDER THE PROVISIONS OF INTERNAL REVENUE CODE SECTION 501(C)(3). IN ADDITION, THE ORGANIZATION HAS BEEN DETERMINED BY THE INTERNAL REVENUE SERVICE TO BE OTHER THAN A PRIVATE FOUNDATION WITHIN THE MEANING OF SECTION 509(A) OF THE CODE. THE INTERNAL REVENUE CODE PROVIDES FOR TAXATION OF UNRELATED BUSINESS INCOME UNDER CERTAIN CIRCUMSTANCES. THE CONSIGNMENT SHOPS THAT THE ORGANIZATION OPERATES ARE SUBJECT TO SUCH UNRELATED BUSINESS INCOME TAXES.

THE ORGANIZATION HAS NOT BEEN EXAMINED BY THE IRS. THE ORGANIZATION'S TAX RETURNS FROM THE TAX YEARS ENDED SEPTEMBER 30, 2009 THROUGH SEPTEMBER 30, 2011 ARE OPEN TO EXAMINATION BY THE IRS.

PART XI, LINE 8 - OTHER ADJUSTMENTS:

IMPAIRMENT LOSS	-125,000.
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PART XII, LINE 2D - OTHER ADJUSTMENTS:

MANAGEMENT FEES INCLUDED IN INVESTMENT RETURN ON F/S	-47,161.
LOSS ON IMPAIRMENT	-125,000.
TOTAL TO SCHEDULE D, PART XII, LINE 2D	-172,161.

PART XIII, LINE 4B - OTHER ADJUSTMENTS:

MANAGEMENT FEES INCLUDED IN FUNCTIONAL EXPENSES ON FORM 990	47,161.
---	---------

LAND HELD FOR CONSERVATION: LAND HELD FOR CONSERVATION IS RECORDED AT COST WHEN PURCHASED OR AT FAIR MARKET VALUE AT THE DATE OF ACQUISITION, IF

**Part XIV** Supplemental Information (continued)

DONATED. MANAGEMENT REVIEWS EACH PARCEL PERIODICALLY TO DETERMINE IF THERE  
HAS BEEN IMPAIRMENT TO THE VALUE THAT IS RECORDED IN THE STATEMENT OF  
FINANCIAL POSITION.

Department of the Treasury  
Internal Revenue Service

**Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.**  
**▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.**

OMB No. 1545-0047

2010

**Open To Public Inspection**

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number  
59-1157084

## Part I

**Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- 1** Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a ☒ Mail solicitations  
b ☐ Internet and email solicitations  
c ☒ Phone solicitations  
d ☒ In-person solicitations  
e ☒ Solicitation of non-government grants  
f ☒ Solicitation of government grants  
g ☒ Special fundraising events

- 2 a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☒ Yes ☐ No

- b. If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
MARTZ & LUNDY - 1200 WALL STREET WEST, LYNDHURST, NJ	CONSULTANT ON CAPITAL CAMPAIGN		X	5,077,043.	26,885.	5,050,158.
<b>Total</b> .....				5,077,043.	26,885.	5,050,158.

- 3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

FL, PA

**Part II Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

	(a) Event #1 MAGIC UNDER THE MANGROVE	(b) Event #2 RED SNOOK FISHING TOUR	(c) Other events NONE	(d) Total events (add col. (a) through col. (c))
	(event type)	(event type)	(total number)	
<b>Revenue</b>				
1 Gross receipts .....	1,063,157.	98,215.		1,161,372.
2 Less: Charitable contributions .....	606,945.	49,758.		656,703.
3 Gross income (line 1 minus line 2) .....	456,212.	48,457.		504,669.
<b>Direct Expenses</b>				
4 Cash prizes .....				
5 Noncash prizes .....				
6 Rent/facility costs .....	151,951.			151,951.
7 Food and beverages .....				
8 Entertainment .....				
9 Other direct expenses .....	304,261.	48,457.		352,718.
10 Direct expense summary. Add lines 4 through 9 in column (d) .....				( 504,669 )
11 Net income summary. Combine line 3, column (d), and line 10 .....				0.

**Part III Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

	(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
<b>Revenue</b>				
1 Gross revenue .....				
<b>Direct Expenses</b>				
2 Cash prizes .....				
3 Noncash prizes .....				
4 Rent/facility costs .....				
5 Other direct expenses .....				
6 Volunteer labor .....	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7 Direct expense summary. Add lines 2 through 5 in column (d) .....				( )
8 Net gaming income summary. Combine line 1, column d, and line 7 .....				

9 Enter the state(s) in which the organization operates gaming activities: \_\_\_\_\_

a Is the organization licensed to operate gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: \_\_\_\_\_

- 11 Does the organization operate gaming activities with nonmembers? ☐ Yes ☐ No
- 12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13 Indicate the percentage of gaming activity operated in:
- |                               |     |   |
|-------------------------------|-----|---|
| a The organization's facility | 13a | % |
| b An outside facility         | 13b | % |
- 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue?
- ☐
- Yes
- ☐
- No

b If "Yes," enter the amount of gaming revenue received by the organization ► \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ► \$ \_\_\_\_\_.

c If "Yes," enter name and address of the third party:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

## 16 Gaming manager information:

Name ► \_\_\_\_\_

Gaming manager compensation ► \$ \_\_\_\_\_

Description of services provided ► \_\_\_\_\_

☐ Director/officer☐ Employee☐ Independent contractor

## 17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ \_\_\_\_\_

**Part IV** **Supplemental Information.** Complete this part to provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).

## SCHEDULE G, PART I, LINE 2B, LIST OF TEN HIGHEST PAID FUNDRAISERS:

(I) NAME OF FUNDRAISER: MARTZ &amp; LUNDY

(I) ADDRESS OF FUNDRAISER: 1200 WALL STREET WEST, LYNTHURST, NJ 07071



Department of the Treasury  
Internal Revenue Service

▶ **Attach to Form 990.** ▶ **See separate instructions.**

OMB No. 1545-0047

2010

## Open to Public Inspection

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number  
59-1157084

## Part I Questions Regarding Compensation

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

**3** Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply.

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Compensation committee   | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

**a Receive a severance payment or change-of-control payment from the organization or a related organization?**

**b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?

**c** Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3) and 501(c)(4) organizations must complete lines 5-9.**

**5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

**a** The organization?

**b Any related organization?**

If "Yes" to line 5a or 5b, describe in Part III.

**6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

**a** The organization?

**b Any related organization?**

If "Yes" to line 6a or 6b, describe in Part III.

**7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III

**8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

9 If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

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

Schedule J (Form 990) 2010

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 ANDREW MCELWAIN	(i)	171,600.	0.	0.	0.	0.	171,600.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
2	(i)							
	(ii)							
3	(i)							
	(ii)							
4	(i)							
	(ii)							
5	(i)							
	(ii)							
6	(i)							
	(ii)							
7	(i)							
	(ii)							
8	(i)							
	(ii)							
9	(i)							
	(ii)							
10	(i)							
	(ii)							
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.**

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

OMB No. 1545-0047

2010

## Open To Public Inspection

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number  
59-1157084

<b>Part I</b>	<b>Excess Benefit Transactions</b> (section 501(c)(3) and section 501(c)(4) organizations only).
---------------	--

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

[illegible]

**2** Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958

**3** Enter the amount of tax, if any, on line 2, above, reimbursed by the organization

<b>Part II</b>	<b>Loans to and/or From Interested Persons.</b>
----------------	---

Complete if the organization answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a.

[illegible]

**Total** .....

**Part III Grants or Assistance Benefiting Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

[illegible]

**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
JOHN FUMAGALI	BOARD MEMBER	0.	JOHN IS PRE		X

**Part V Supplemental Information**

Complete this part to provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: JOHN FUMAGALI

(D) DESCRIPTION OF TRANSACTION: JOHN IS PRESIDENT OF THE BANK THE  
 ORGANIZATION HAS LOANS AND LINE OF CREDIT WITH.

**SCHEDULE M  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

► **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**  
► **Attach to Form 990.**

OMB No. 1545-0047

**2010**

Open to Public  
Inspection

Name of the organization

**THE CONSERVANCY OF SOUTHWEST FLORIDA**

Employer identification number

**59-1157084**

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art .....				
2 Art - Historical treasures .....				
3 Art - Fractional interests .....				
4 Books and publications .....				
5 Clothing and household goods .....				
6 Cars and other vehicles .....				
7 Boats and planes .....	X	1	15,000.	DEALER
8 Intellectual property .....				
9 Securities - Publicly traded .....				
10 Securities - Closely held stock .....	X	1,910	33,000.	FMV
11 Securities - Partnership, LLC, or trust interests .....				
12 Securities - Miscellaneous .....				
13 Qualified conservation contribution - Historic structures .....				
14 Qualified conservation contribution - Other .....				
15 Real estate - Residential .....				
16 Real estate - Commercial .....				
17 Real estate - Other .....				
18 Collectibles .....				
19 Food inventory .....				
20 Drugs and medical supplies .....				
21 Taxidermy .....				
22 Historical artifacts .....				
23 Scientific specimens .....				
24 Archeological artifacts .....				
25 Other ► ( <b>ADVERTISING</b> ) .....	X	1	13,520.	FMV
26 Other ► ( <b>SERVICES</b> ) .....	X	5	10,677.	FMV
27 Other ► ( <b>SUPPLIES</b> ) .....	X	6	2,319.	THRIFT SHOP VALUE
28 Other ► ( ) .....				

**29** Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement .....

**29**

**30a** During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period? .....

b If "Yes," describe the arrangement in Part II.

**31** Does the organization have a gift acceptance policy that requires the review of any non-standard contributions? .....

**32a** Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? .....

b If "Yes," describe in Part II.

**33** If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.

	Yes	No
<b>30a</b>		X
<b>31</b>	X	
<b>32a</b>		X

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

Schedule M (Form 990) (2010)

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

Department of the Treasury  
Internal Revenue Service

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

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

OMB No. 1545-0047

**2010**

Open to Public  
Inspection

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number  
59-1157084

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

NATURAL ENVIRONMENT AND QUALITY OF LIFE NOW AND FOREVER. THE  
CONSERVANCY IS A GRASSROOTS ORGANIZATION FOCUSED ON THE CRITICAL  
ENVIRONMENTAL ISSUES OF THE SOUTHWEST FLORIDA REGION. WE WORK TO  
PROTECT LAND, WATER AND WILDLIFE, CONTROL UNPLANNED GROWTH AND EDUCATE  
THE PUBLIC ABOUT SOUTH FLORIDA'S WILDLIFE. WE USE SCIENCE-BASED  
RESEARCH TO INFORM GOVERNMENT LEADERS AND PROMOTE SOUND ENVIRONMENTAL  
POLICIES AND PRACTICES. WE FORGE CONSERVATION PARTNERSHIPS ON THE  
LOCAL, REGIONAL AND NATIONAL LEVEL TO HAVE MAXIMUM IMPACT. RESEARCH  
FROM OUR SCIENCE DEPARTMENT PROVIDES THE BASIS FOR THE WORK THAT WE DO.

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

WORK TO PROTECT LAND, WATER AND WILDLIFE, CONTROL UNPLANNED GROWTH AND  
EDUCATE THE PUBLIC ABOUT SOUTH FLORIDA'S WILDLIFE. WE USE SCIENCE-BASED  
RESEARCH TO INFORM GOVERNMENT LEADERS AND PROMOTE SOUND ENVIRONMENTAL  
POLICIES AND PRACTICES. WE FORGE CONSERVATION PARTNERSHIPS ON THE  
LOCAL, REGIONAL AND NATIONAL LEVEL TO HAVE MAXIMUM IMPACT. RESEARCH  
FROM OUR SCIENCE DEPARTMENT PROVIDES THE BASIS FOR THE WORK THAT WE DO.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

DEVELOPING MORE STRINGENT STORMWATER RULES.

- ENSURING THAT SUSTAINABLE AND SMART GROWTH PLANS ARE DEVELOPED AND  
EXECUTED IN RURAL AREAS AND COUNTIES IN THE REGION.

- WORKING WITH VARIOUS ENVIRONMENTAL ORGANIZATIONS TO PROTECT THE  
ENDANGERED FLORIDA PANTHER AND ITS HABITAT.

- SUPPORTING THE PURCHASE OF LANDS THAT OFFER ENVIRONMENTAL BENEFIT AND

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number

59-1157084

PUBLIC BENEFIT, INCLUDING EVERGLADES RESTORATION.

- MANAGING CONSERVATION EASEMENTS ACROSS THE REGION TO ENSURE THEIR  
LONG-TERM ENVIRONMENTAL INTEGRITY.

- PLAYING AN ACTIVE ROLE TO ENSURE THAT ADEQUATE AMOUNTS AND QUALITY OF  
WATER ARE DELIVERED INTO THE UNIQUE ESTUARINE SYSTEMS IN SOUTHWEST  
FLORIDA.

- RECOMMENDING AND SUPPORTING ENVIRONMENTALLY RESPONSIBLE SITES FOR  
FUTURE DEVELOPMENT.

- WORKING TO LIMIT DEVELOPMENT IN WETLANDS TO PROTECT THE AREA FROM  
FLOODS AND HELP IMPROVE WATER QUALITY FOR PEOPLE AND FOR WILDLIFE.

WHILE THE PRIMARY OBJECTIVE OF THE POLICY AND ADVOCACY TEAM IS TO  
COLLABORATE TO REACH ENVIRONMENTALLY-RESPONSIBLE DECISIONS, LEGAL  
ACTION IS TAKEN WHEN MERITED TO PRESERVE THE QUALITY OF LIFE IN  
SOUTHWEST FLORIDA. THE TEAM ALSO UTILIZES A TRAINED AND PASSIONATE  
GROUP OF VOLUNTEERS TO CONDUCT ENVIRONMENTAL OUTREACH PROGRAMS, AND  
ENVIRONMENTAL ACTION COMMITTEES TO INFLUENCE DECISION-MAKERS.

A COMPREHENSIVE E-ADVOCACY SYSTEM AND SEASONAL INTERNS ALSO SUPPORT  
THEIR WORK.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:

- LEADING FIELD TRIPS FOR SCHOOL GROUPS, ADULT GROUPS, AND FAMILY  
GROUPS AT THE CONSERVANCY NATURE CENTER REACHED AN ESTIMATED 1908  
PEOPLE IN 2009-10.

- WORKING WITH LOCAL COUNTY EDUCATION DEPARTMENT REPRESENTATIVE TO  
PIONEER OFF-SITE VIDEO LEARNING AND PROVIDING TOOLS TO TEACHERS FOR  
ENVIRONMENTAL PROGRAMS.

- OFFERING AWARD WINNING ECO-CAMPS TO OVER 1,000 CHILDREN IN THE PAST 5  
YEARS, INCLUDING BOYS AND GIRLS CLUB STUDENTS THAT PROVIDED NATURE



Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number

59-1157084

EXCURSIONS, FIELD TRIPS, ANIMAL ENCOUNTERS, AND MORE.

- CREATING AND DELIVERING NATURE CENTER EDUCATIONAL PROGRAMMING AND TRAINING THE VOLUNTEER CREW TO ASSIST IN THE EDUCATION PROCESS TO OVER 15,000 VISITORS EACH YEAR:

- HOURLY NATURE CENTER ECO-EDUCATION PROGRAMS

- NARRATED ELECTRIC BOAT ECO-CRUISES

- TRAIL WALKS

- MANAGEMENT OF THE INDOOR PROGRAMS AND LIVE-ANIMAL EXHIBITS IN THE DISCOVERY CENTER

- DEVELOPING ON-SITE SPECIAL PROGRAMS SUCH AS EARTH DAY FESTIVALS TO MAKE ENVIRONMENTAL LEARNING FUN AND INTERACTIVE.

- ADDING OFF-SITE ADULT ENVIRONMENTAL EDUCATION NATURE EXCURSIONS AND FIELD TRIPS TO OVER 1102 ADULTS IN 2009-2010.

- DEVELOPING CONTENT AND TRAINING VOLUNTEERS TO HOST FREE NATURE WALKS AT THREE SITES IN THE AREA AND NARRATED CRUISES THROUGH ROOKERY BAY THAT REACHED AN ESTIMATED 500 PEOPLE IN 2009-10.

OPERATING COSTS INCLUDE PROGRAM SUPPLIES, FOOD FOR DISCOVERY CENTER ANIMALS AND STAFF TIME. EXPENSES ARE KEPT IN CHECK BY THE USE OF SEASONAL INTERNS, VOLUNTEERS AND COMMUNITY PARTNERS WHO OCCASIONALLY SPONSOR OR UNDERWRITE EVENTS AND PROGRAMS.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

MAJOR INITIATIVES INCLUDE:

- BASELINE MONITORING SURVEYS FOR WESTERN EVERGLADES RESTORATION.

- MONITORING AND ASSESSING MANGROVE POPULATIONS AND RESTORATION.

- RADIO AND SONIC TELEMETRY RESEARCH WITH LISTED SPECIES.

- CONTINUING ONE OF THE LONGEST SEA TURTLE MONITORING PROGRAMS IN THE COUNTRY, INCLUDING APPLYING SATELLITE TRACKING TO BETTER MONITOR SEA

Name of the organization

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## TURTLE HABITS.

- LONG-TERM MONITORING OF WATER QUALITY PARAMETERS IN COASTAL AND FRESHWATER SYSTEMS.

- RESEARCH AND ASSESSMENT OF STORMWATER RUNOFF, WATER RESOURCES, WATERSHEDS AND LOCAL AQUIFERS.

THE DIVISION DEDICATES ITSELF TO PROVIDING UNBIASED STUDIES AND WITH OVER 100 YEARS OF COLLECTIVE EXPERIENCE, THEY PROVIDE THE DEPTH OF EXPERIENCE AND KNOWLEDGE RANGING FROM CONDUCTING ENVIRONMENTAL SITE AUDITS TO DETAILED LAB STUDIES.

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

CONSERVANCY OF SOUTHWEST FLORIDA WILDLIFE REHABILITATION CLINIC:

ORIGINALLY BUILT IN 1979 TO TREAT 400-600 ANIMALS PER YEAR, THE CONSERVANCY OF SOUTHWEST FLORIDA WILDLIFE REHABILITATION CLINIC NOW TREATS UPWARDS OF 2,200 ANIMALS A YEAR IN AN ANTIQUATED 1,500 SQUARE FOOT FACILITY. IT IS THE ONLY FACILITY OF ITS KIND WITHIN COLLIER COUNTY AND RECEIVES NO GOVERNMENT FUNDING.

THE INJURED, SICK AND ORPHANED NATIVE WILDLIFE ARE TREATED BY A CARING STAFF OF THREE FULL-TIME EMPLOYEES AND SEASONAL INTERNS SUPPORTED BY A CADRE OF VOLUNTEERS WHO CLEAN CAGES, COURIER INJURED ANIMALS AND OFFER SUPPORTIVE CARE. THE CONSERVANCY WILDLIFE CLINIC ALSO RELIES ON A DEDICATED GROUP OF VETERINARIANS IN THE COMMUNITY TO PROVIDE ADVANCED CARE WHEN IT IS NEEDED.

THE COST TO TREAT EACH ANIMAL EXCEEDS \$100 ANNUAL OPERATING EXPENSES FOR FOOD, MEDICAL SUPPLIES AND STAFF AVERAGE \$250,000. INCREMENTAL OPERATING COSTS ARE SUBSIDIZED BY COMMUNITY PARTNERS WHO SOMETIMES DONATE BASIC FOOD NEEDS FOR THE ANIMALS.

THE WILDLIFE CLINIC RELEASES ABOUT HALF OF THE ANIMALS TREATED BACK

032212  
01-24-11

Schedule O (Form 990 or 990-EZ) (2010)

Name of the organization

THE CONSERVANCY OF SOUTHWEST FLORIDA

Employer identification number

59-1157084

INTO THEIR NATURAL HABITATS.

EXPENSES \$ 705,099. INCLUDING GRANTS OF \$ 0. REVENUE \$ 40,781.

FORM 990, PART VI, SECTION A, LINE 3: ALL OFFICERS, AND ALL COMMITTEE CHAIRS. IN THE ABSENCE OF THE BOARD, THEY MAY ACT ON IT'S BEHALF

FORM 990, PART VI, SECTION A, LINE 6: THE ORGANIZATION IS MADE UP OF MEMBERS WHO PAY DUES. ALL MEMBERS HAVE THE SAME RIGHTS.

FORM 990, PART VI, SECTION A, LINE 7A: THE MEMBERS ELECT THE BOARD OF DIRECTORS DURING THE ANNUAL MEETING.

FORM 990, PART VI, SECTION B, LINE 11: BUDGET AND FINANCE COMMITTEE WILL REVIEW THE 990; THE 990 WILL BE MADE AVAILABLE TO ALL BOARD MEMBERS PRIOR TO FILING, ALL QUESTIONS AND CONCERNS WILL BE BROUGHT TO BUDGET & FINANCE FOR FINAL REVIEW. SUBSEQUENT TO FILING THE AUDIT COMMITTEE WILL REVIEW.

FORM 990, PART VI, SECTION B, LINE 12C: WE DISTRIBUTE CONFLICT OF INTEREST STATEMENTS FOR BOARDMEMBERS TO SIGN AT BEGINNING OF YEAR. AT EACH MEETING, COMMITTEE OR OTHERWISE, WE ANNOUNCE THE AGENDA AND THEN ASK IF ANYONE HAS A CONFLICT WITH ANY ITEMS. IF YES, THEY EXCUSE THEMSELVES FROM DISCUSSION AND VOTE ON SAID ITEM.

FORM 990, PART VI, SECTION B, LINE 15: THERE IS A COMPENSATION COMMITTEE THAT MEETS AND RECOMENDS SALARIES TO THE BOARD.

FORM 990, PART VI, SECTION C, LINE 19: THE ORGANIZATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE MADE

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AVAILABLE UPON REQUEST.

FORM 990, PART XI, LINE 5, CHANGES IN NET ASSETS:

NET UNREALIZED LOSSES ON INVESTMENTS: -515,448.

IMPAIRMENT LOSS -125,000.

TOTAL TO FORM 990, PART XI, LINE 5 -640,448.

FORM 990, PART XI, LINE 2C:

THE PROCESS OF ASSUMING RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT OF  
THE ORGANIZATION'S FINANCIAL STATEMENTS AND SELECTION OF AN INDEPENDENT  
ACCOUNTANT HAS NOT CHANGED FROM THE PRIOR YEAR.