

COMMUNITY FOUNDATION OF COLLIER COUNTY

2017-2018

COMMUNITY REPORT



COMMUNITY FOUNDATION
OF COLLIER COUNTY
FOR GOOD. FOREVER.

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COMMUNITY FOUNDATION
OF COLLIER COUNTY
FOR GOOD. FOREVER.

What is a Community Foundation?

From environment and education to health and economic development, the Community Foundation has the knowledge and expertise to ensure our donors can maximize the impact of their giving. And our proven track record of sound investments ensures those generous gifts can continue creating meaningful change into the future.

- We are a collection of charitable funds established by individuals, families, businesses, and organizations to help address critical needs and improve the quality of life in Collier County.
- We receive charitable gifts, work with families, individuals, attorneys and estate and financial planners to devise plans that fit every economic situation, ensuring that donors' charitable contributions are used to the fullest extent and for maximum benefit.
- We place those gifts into funds, manage the assets of those funds for growth and make grants from those funds.
- We offer several types of funds to help donors achieve their charitable goals while also meeting community needs.
- In addition to making donations to nonprofits and special projects in our community, we identify needs, stimulate resources to address those needs and help Collier County prepare for the future.
- Our volunteer board and experienced staff are committed to understanding donor needs, representing their charitable interests, expertly handling complex gifts, wisely managing charitable funds and leveraging a wealth of community knowledge to increase charitable impact.
- We serve as a hub for collaboration between philanthropists, nonprofits and other funding organizations across the community.

TURTLE TIME

The Community Foundation of Collier County is a leader in community collaboration through grant distributions to nonprofit organizations and local programs which address community needs—from complex issues to simple solutions. In April 2018, the Community Foundation provided a small grant of \$2,000 donation to the Collier County Parks and Recreation Division, Sea Turtle Protection Program, to construct sea turtle cages to keep predators such as raccoons out of incubating sea turtle nests on Vanderbilt Beach. Previously since 1995, the nests had been protected with flat screens secured into the sand with metal tent stakes. However, raccoons had since figured out how to dig below the screens and remove the eggs and hatchlings. By the end of June 2018, the new cages substantially reduced the number of stolen eggs from over 2,000 in the 2017 nesting season to only 15 this year. Simple solutions with remarkable results.



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MAKING A DIFFERENCE

Dear Friends,

“Alone we can do so little; together we can do so much.” Never before has this quote by Helen Keller resounded so deeply here in Collier County as in this past year. Since September 2017, we have witnessed the determination, passion, and kindness of those who came together to help neighbors and complete strangers in need after we were hit by the largest storm ever to make landfall in Florida—Hurricane Irma.

“Collier Comes Together” is not only the name of our Hurricane Irma disaster relief fund but also describes how, thanks to the help of our Board of Trustees, staff, community, philanthropic partners, nonprofits and the generosity of many others spanning the country, we were able to provide thousands with aid—from immediate needs such as food and water, to rental assistance and lost wages, and to long-term needs of roof replacement and home repair.

While helping to get our community back on its feet absorbed a significant portion of our time and resources, we were also able to focus on initiatives to generate awareness and change such as the Community Needs Assessment Study conducted with the Richard M. Schulze Family Foundation. This eye-opening study identified gaps in local health and mental health care access, education, and housing affordability and has already inspired action, not only by the Community Foundation but also by local officials and organizations as well.

We are proud to present to you the Community Foundation of Collier County 2017-18 Community Report. This publication represents more than just our facts and figures. It offers you an up close and personal look into the game changers over the past year, what inspired people to give, and what we were able to accomplish due to the generosity of those who care so deeply. It celebrates visionary thinking, innovative solutions, an entrepreneurial spirit and the desire to make a difference in the community we all love.

We are pleased to share our success stories and are so grateful to the many that made them possible. With your generous support, our opportunities are endless. We can continue to be proactive and forward thinking in how we can best serve our community. Not every gift is monumental, but each one inspires positive change.

Coming together is just the beginning. By working together, we will make a lasting difference.

With great appreciation,

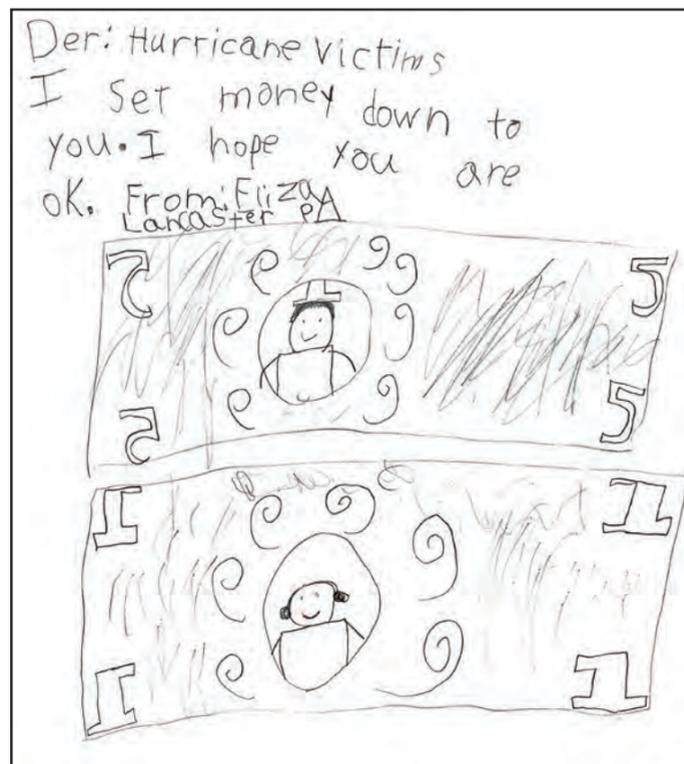


Mary Lynn Myers, CFCC Board Chair



Eileen Connolly-Keesler, CFCC President/CEO

Donations large and small poured in from across the county including this donation from Eliza from Lancaster, PA.



Front Row: George Abounader, Erika Aron, Patricia Aiken-O'Neill, Mary Lynn Myers, Jennifer B. Walker, Myra Williams, John K. Paul
Back Row: Brian V. McAvoy, Jerry Tostrud, Kathleen Kapnick, Bradley Havemeier, Todd Bradley, Marsha Murphy, David Watson, Lynn Martin, Eileen Connolly-Keesler
Not Pictured: T. Robert Bulloch, Mary Beth Johns, James F. Morey, Mario Valle.

OUR MISSION:

To improve the quality of life in Collier County by connecting donors to community needs and providing leadership on critical community issues. For good. Forever.

THE COMMUNITY FOUNDATION OF COLLIER COUNTY is governed by a Board of Trustees and committees comprised of local community leaders and philanthropists. The Community Foundation is administered by a full-time professional staff. Operating expenses are paid from management fees, through grants and partnerships with local and national foundations and organizations, and from gifts designated by donors to cover Foundation operating costs.

For a complete listing of funds and grants, please visit cfcollier.org.



Thomas and Celine are all smiles while learning

Giving is All in the Family

With passion and devotion, the Howard and Troth Family Fund lights the way for children and families in need with a state-of-the-art approach to education

Robert S. “Rusty” Troth has taken a generational approach to lift up Collier County by identifying and meeting crucial needs. The Howard and Troth Family Fund was established 17 years ago with his wife, Betty Howard Troth, their three adult children, and their grandmother, Betty R. Howard—lighting the way for future philanthropists in the family.

As a six-year board member of Fun Time Early Childhood Academy, Troth has been a generous supporter through the Fund and through his hands-on leadership—preparing hundreds of low-income children aged 2 to 5 for academic success in kindergarten and beyond. The Fund has also been a generous donor to the Community Foundation of Collier County, providing it with much-needed funding to purchase its own building and with operating support—ensuring it will continue having a significant impact. And when disaster strikes, the Howard and Troth Family Fund has the flexibility to donate to national organizations, and local relief agencies and efforts, including the Collier Comes Together Fund following Hur-

ricane Irma. “Decisions are made on a case-by-case basis,” Rusty Troth explained.

A family fund reflects the passions of each family member, and it is clear that Troth has a soft spot in his heart for giving young students at Fun Time a hand-up that will last their lifetime. His Family Fund is a significant benefactor for the Fun Time annual appeal, a yearly fundraiser and the Community Foundation of Collier County Give Where You Live Collier campaign. More than that, he immerses himself in leading research on brain development and preparing youngsters for academia before they reach kindergarten, and tracks changing grant-making trends and demographics in Collier County. He is what Fun Time Executive Director Barbara Tyrell calls “a working board member who’s a strong leader and who has a very balanced perspective about where we should put our energies.”

His children, Jeanne Troth Dowd and Christopher and Andrew Troth, are successor donor advisors. Their mother died in 2006, and every year, each sibling is allocated about 10 percent of the fund’s



Learning activities abound in Fun Time Classrooms

“CHARITABLE GIVING HAS ALWAYS BEEN AN IMPORTANT OBJECTIVE AND RESPONSIBILITY WITHIN THE HOWARD AND TROTH FAMILIES.”
— ROBERT S. “RUSTY” TROTH

anticipated total distributions for the year. They provide their recommendations to their father, who adds them to his list of grantees for the Community Foundation, where the Fund is held.

Troth is buoyed by Fun Time’s success in preparing its 96 children for success and aware of its board’s challenge in raising more than 50 percent of the school’s budget each year. “Charitable giving has always been an important objective and responsibility within the Howard and Troth families. The establishment of the Howard and Troth Family Fund has proven to be a convenient and fruitful way to help the family meet those responsibilities,” he says. “Beyond that, the family has been pleased to partner with the Community Foundation of Collier County in accomplishing its mission of addressing important needs in this community and beyond.”



Andrew S. Troth, Jeanne Troth Dowd, Robert S. (Rusty) Troth, Christopher H. Troth

ENDOWMENTS + SCHOLARSHIPS = GRADUATION SUCCESS

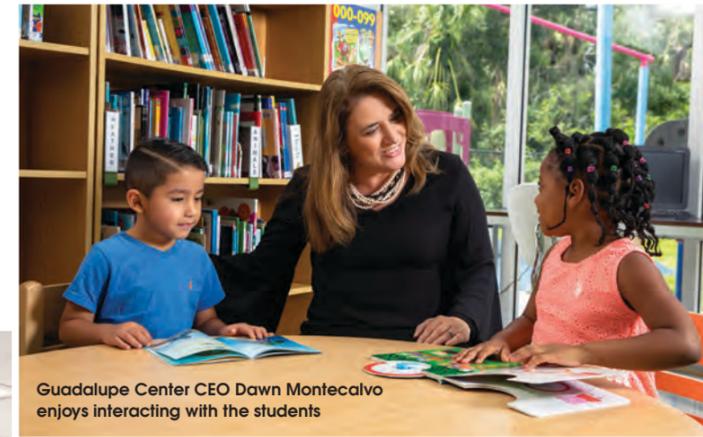
Students tutoring students. What better way for the future leaders of tomorrow to feel empowered and connected while making a difference in the lives of so many

When the Guadalupe Center in Immokalee launched a \$2 million endowment campaign, it partnered with the Community Foundation of Collier County to set up and manage the fund. Donors Rosemary and Walter Blankley, who is a long-time Guadalupe Center board trustee, created the Blankley Tutor Corps Scholarship Endowment in 2017, offering to donate \$1 million if the nonprofit could raise \$1 million. The \$2 million of principal remains untouched, but the interest it generates annually can fund \$100,000 in scholarships for college students who have participated in the center's Tutor Corps program. Guadalupe's goal is to have a \$10 million scholarship endowment that would fund the annual scholarships for 100 students each year.

Tutor Corps pays Immokalee High School students to tutor kindergartners through second-graders, giving the tutors a source of income and work experience. It is also an intensive college-preparatory program with a remarkable success rate: 100 percent of the participants graduate from high school, and more than 90 percent receive college degrees. There are currently 136 Tutor Corps scholarship recipients, who can earn up to \$4,000 in assistance each year, in college.

"We didn't have a traditional endowment before this. We thought the Community Foundation was the best way to manage these funds and maximize our return," said Guadalupe Center Executive Director Dawn Montecalvo. "We're excited to build the endowment for sustainability for students for years to come." Her organization also moved several other funds—worth more than \$3 million—over to the Community Foundation for their professional investment management expertise.

The Community Foundation staff "are great partners in providing guidance and education for the community, as well as introducing organizations like ours and causes like ours to donors in the community," said Montecalvo. She points to community-wide collaborations among nonprofits as an example of leadership, too. "We're all working together—approaching our challenges as a community, not as individual organizations. The Community Foundation has been very helpful with that."



Guadalupe Center CEO Dawn Montecalvo enjoys interacting with the students

"WE'RE EXCITED TO BUILD THE ENDOWMENT FOR SUSTAINABILITY FOR STUDENTS FOR YEARS TO COME."
— EXECUTIVE DIRECTOR DAWN MONTECALVO



Immokalee High School Tutor Corps participants and Guadalupe Center CEO Dawn Montecalvo join in on a tutoring session

A Couple's Love for Their Community Lives On



Judy Rudolf assists Joshua Wolfson while riding Maggie Mae

"WE'RE GRATEFUL TO DONERS LIKE THIS WHO HAVE SPECIFIC GOALS"
— MELISSA SARACINO LAMONT

A couple's dedication to helping children will live on through a legacy fund, bringing solace to the community they love

Alfred and Vera Goodman left the United Kingdom to make Naples their home decades ago. With few heirs, they wanted their estate to go to local nonprofits that serve needs they were passionate towards. Local estate attorney Brian McAvoy and a bank were tasked with executing the Goodmans' trust and established a field of interest fund at the Community Foundation of Collier County so their legacy would have a lasting impact.

"We decided the best thing to do would be to go to the Community Foundation and establish a fund in their name so the gift would live on in perpetuity and benefit the community they loved," recalls McAvoy. And that's exactly what's happened. Since it was founded in 2000, the Alfred and Vera Goodman Fund has distributed \$809,366 in grants to local healthcare and human services agencies. This year, the Naples Therapeutic Riding Center and NAMI of Collier County were each granted \$15,000.

Naples Therapeutic Riding Center was able to provide free therapeutic riding experiences to clients from three local nonprofits: The Shelter for Abused Women & Children, Avow, and Youth Haven. It was also able to trim its waiting list for this remarkable equestrian program that not only provides therapy but brings joy to so many. "We're so grateful for donors like this who have specific goals, and we are very grateful to receive the support that enables us to help more people," said Naples Therapeutic Riding Center Executive Director Melissa Saracino Lamont.

NAMI is using its grant to expand its free Health Under Guided Systems (HUGS). The only program of its kind helps families identify and treat developmental, social, emotional, behavioral and mental health challenges in their school-age children. "It can be anything that's preventing a child from maximizing their potential in school and in life," said Darla Pasteur, NAMI chief development officer. The caseload is expected to rise from 2,200 students to 3,000 or more this year. In 2017, the Goodman fund provided a \$9,000 grant to cover half the cost of a passenger van to transport clients recovering from mental illness to the Sarah Ann Center, where 500 participants gather each month for social and cultural activities to avoid isolation.



Nicholas Cosentino enjoys riding Clyde with encouragement from Lyn Keith and Stacy Sokol



Viva Jean proudly displays a picture of her young daughter, the inspiration for her hard work, on her desk at Moorings Park



Jasmine Lopez-Ramirez is in control of her future with the help of a Women's Foundation scholarship

The Sky's the Limit

with Women of Initiative Scholarships

Jasmine Lopez-Ramirez, 18, is flying off to Embry-Riddle Aeronautical University to study aerospace engineering with dreams of developing or piloting experimental aircraft for NASA or SpaceX. The National Honor Society student has been focused on her goals all along. She already earned her private pilot's license during four years of aviation instruction at Lely High School with the encouragement of her teacher, who is also her flight instructor. "Financial aid to achieve my short- and long-term goals is something I've known I would need since the beginning of my high school career," she said.

She's also considering becoming a commercial pilot, a predominantly male career choice. "I'm excited as to what's to come. Knowing that this field is mostly male only encourages me to try my very best

and excel. I'm very thankful for the Women of Initiative Scholarship and the chance to follow my dreams," said the Collier County native.

The Women's Foundation of Collier County, a fund at the Community Foundation of Collier County, understands that education is key to breaking the cycle of poverty and awarded 12 scholarships totaling \$60,000 for local women at the 2018 Women of Initiative Honorees Luncheon in March. The scholarship fund was founded by Women of Initiative alumnae in honor of the 20th anniversary of the awards.

Thanks to a Women's Foundation scholarship, another motivated and deserving young woman, Viva Jean, is finally able to become a nurse—a career she's held in her heart since watching her mother struggle with tuberculosis in Haiti.

Jean's mother had inadequate medical care in the impoverished

With the help of the Women of Initiative Scholarships, these two impressive young women have reached their goals through hard work and persistence

island nation and succumbed to the intractable disease when Jean was 10 years old. Now 28, Jean relocated to Southwest Florida after her mother's death and graduated from Immokalee High School. She earned a bachelor's in business with a concentration in healthcare administration—the first in her family to attend college.

A Moorings Park employee for eight years, Jean is attending Florida Southwestern College to become a registered nurse, thanks to a \$5,000 Women of Initiative Scholarship. "I enjoy helping people, and the best way to help people is saving someone's life. What better way to do that than in the medical field?" said the single mother of a young daughter. "I'm super grateful and honored. This award means I don't have to worry about adding on to student loans I already have. When I found out about the scholarship, I cried."



2017-2018 Women's Foundation of Collier County Board of Directors

- | | |
|---------------------------|--|
| Bev Cherry, Chair | Jinny Johnson |
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HIGH-TECH

Solutions for Unconventional Learning



Hannah "attends" school with her classmates thanks to the VGo robot funded by a Community Foundation grant

This VGo robot puts a positive spin on being plugged-in by bringing the classroom to students anywhere; supporting engagement and collaboration while having a fun time learning

Hannah didn't miss out on her classwork or Calusa Park Elementary School friends while she was hospital-bound in Philadelphia for a week. A VGo "telepresence" robot provided to the school district by a donor-advised fund at the Community Foundation of Collier County connected her in real time through a laptop and joystick from afar.

Hannah, a kindergartner who requires treatments at the Shriners Hospitals for Children, participated in morning meetings and guided reading assignments. "Hannah was able to participate in her academic responsibilities, contribute and be a valued member of her class," said her mother. "What Hannah enjoyed the most was being able to stay connected to her friends and her fabulous teacher."

The VGo was also used in a pilot program at Sabal Palm Elementary in an intensive behavior intervention classroom for students in the first and second grade. The teacher taught a dreaded phonics lesson by sitting at a laptop in a separate room, while the students trained their attention on the robot. No one was disruptive, and the students actually enjoyed it. "They were so engaged and participated in the lesson much more than they normally would have," says Collier County Public Schools Assistive Technology Specialist Sheri Wiseman. "We all know that when you can increase engagement, poor behaviors decrease."

The audio-enabled robot with webcam was donated last year through the donor-advised fund of Alex and Pat Vance. Another VGo is being ordered courtesy of a grant by Naples estate attorney Bill Myers through the Community Foundation. Enabling remote classroom attendance was one of the robot's original intentions. This academic year, Wiseman's team was in an "exploratory mode" to assess alternatives applications.

"I think it's great they're finding creative ways to use it. It's a case where technology has benefits in ways that may not be originally intended but are instructive nonetheless," said Alex Vance. "We all have to learn to use technology in our daily lives, and we all want to find ways to make it meet our needs."



"WHAT HANNAH ENJOYED THE MOST WAS BEING ABLE TO STAY CONNECTED TO HER FRIENDS AND HER FABULOUS TEACHER."
— HANNAH'S MOTHER

BEFORE AND AFTER THE STORM:

UNITY

Collier County united to rebuild lives and homes after the most massive storm to hit Southwest Florida landed on the front porch

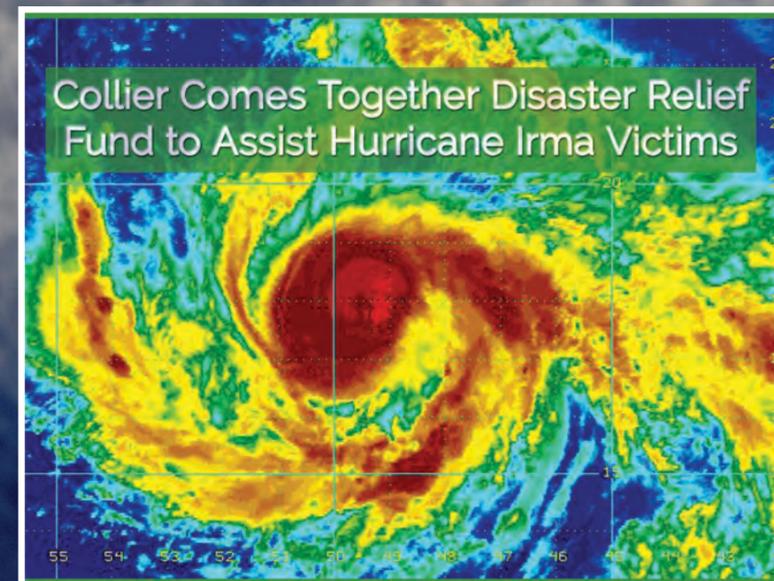
Everyone watched with trepidation as Hurricane Irma grew into a 400-mile-wide behemoth and tracked her trajectory toward Southwest Florida last September, bracing for the worst. After the most massive hurricane to hit Florida made landfall on Marco Island, we all came together to embrace the road to recovery.

Unity was the common goal for Collier County residents, nonprofits, and agencies. The Community Foundation of Collier County, in partnership with the United Way of Collier County, quickly established the Collier Comes Together Disaster Relief Fund to pool tax-deductible contributions to meet the deluge of immediate needs—both immediate and long-term.

Before the storm, the Community Foundation had already forecast the possibility of a community crisis. Community Foundation President and CEO Eileen Connolly-Keesler had brought several partners together over two days in August to discuss how the Foundation should prepare philanthropically for addressing a natural or man-made disaster. “Two weeks later, we have Irma. It was intuitive, serendipity, whatever you want to call it,” she said. The Community Foundation’s generous board members and donors, partners such as the Richard M. Schulze Family Foundation, and organizations such as the Collier Building Industry Association, unified to build a nearly \$2.2 million relief fund. One hundred percent of donations were distributed to 27 nonprofits aiding 4,146 hurricane victims, with no administrative fee.

“Together, both our organizations hosted a FEMA roundtable discussion where we invited nonprofit agencies and 12 FEMA representatives from all departments after Irma’s landfall,” said United Way of Collier County President and CEO Steve Sanderson. The United Way received a \$50,000 Collier Comes Together grant for its 211 hotline and Volunteer Col-

IN THE WAKE OF IRMA





Left: A worker installs new shingles on a Habitat for Humanity home. Below: Mark, a homeowner in Copeland, is relieved and grateful to see the progress on his home made possible by Collier Comes Together funds.



lier programs. “We coordinated information and referral needs with the county and all first responders, managing over 7,000 calls in the first week alone. Resources from Collier Comes Together were vital to help us keep up with the demand.”

As field kitchens sprung up and chainsaws whirred, the Community Foundation’s Changing Needs Fund, along with a few other donors, provided the Harry Chapin Food Bank with \$75,000 within two days of the storm. Collier Comes Together provided more than \$400,000 in gift cards valued from \$150 to \$250 that were distributed through the Salvation Army Naples, Catholic Charities, and others with boots on the ground. Rooms To Go donated 80 rooms of furniture and \$25,000 through the Fund.

The Salvation Army gave out 650 gift cards from the Collier Comes Together Fund to 183 households totaling \$125,500 in hard-hit communities, including East Naples and Golden Gate. “It could have been the difference between whether someone could eat or not eat,” said Salvation Army Naples Regional Coordinator of Social Services and Disaster Recovery, Ashley Jones. “The gift cards allowed the Salvation Army to immediately respond to the needs of survivors and allow them the flexibility to purchase the items they needed. The Community Foundation was forward-thinking, and asked, ‘What’s next? What can we do to fill the immediate void?’”

Irma’s wrath brought floodwaters to Everglades City and outlying towns such as Jerome, Copeland and Ochopee, Chokoloskee, Plantation Island, and Immokalee, hitting these low-income Collier County communities the hardest. At one point, a third of the 190 students at Everglades City School were displaced “and a lot of them are still waiting to get back in their homes,” Principal Jim Ragusa reported in May 2018. A \$35,000 grant to Collier County Public Schools assisted stu-

dents throughout the county who were left homeless for nearly three months after the storm.

Before Irma, 68 percent of the Everglades student body was on free or reduced lunches; that number rose to 88 percent after the storm. The Communities of Everglades Disaster Recovery Task Force continues to meet twice a month to pour over needs and solutions. It’s been estimated that as many as three-quarters of the area’s buildings — many uninsured — were flooded up to four feet. “It was a traumatic blow to this community,” Ragusa said.

No matter where you live, preparing for the storm—evacuating or putting up storm shutters and stocking up on supplies—cost residents unbudgeted, out-of-pocket expenses. The aftermath brought costs, too. Loss of power meant loss of refrigerators worth of food, and the need to purchase ice, water, generator fuel, medicine, tarps, cleaning supplies and other vital staples. Some uninsured residents incurred unforeseen medical costs due to lacerations, back injuries, broken bones and infections sustained while clearing fallen trees and moldered drywall. Lost paychecks before and after the storm was another financial affront.

Collier Comes Together distributed more than \$1.2 million in housing grants to several organizations to fill the insurance gap



Clockwise from top: Remnants of families’ lives piled up in the streets were a common sight; First Florida Integrity Bank provided fee-free gift cards that were distributed by Habitat for Humanity for immediate needs; piles of debris piled up in the gym of the Everglades City School; homes in Everglades City were left with nothing but mud on the floor.

for marginalized homeowners facing unmanageable deductibles and for home repairs in hard-hit communities.

One recipient, Rural Neighborhoods, Inc., was granted \$295,000 to assist residents, seniors, the disabled, and low-income households in Immokalee, Naples, and River Park affected by Hurricane Irma. Rural Neighborhoods is a housing and community development charity that has been working in Immokalee since 2002. President Steve Kirk said a typical roof replacement is \$10,000 but can run up to \$17,000. Some homes only needed a repair. Others were flooded, requiring floors, drywall, counters, and cabinets to be replaced. Homes were not insured, or insurance did not cover total repair costs.

Kirk’s organization worked side-by-side with volunteers to defray labor costs wherever possible. His team members also acted as project liaisons, helping homeowners find general contractors and subcontractors, negotiating, scheduling and closing out project contracts. By this summer, Rural Neighborhoods had completed 16 household repairs, was working on ten more, and had another 11 in the pipeline.

“THE GIFT CARDS ALLOWED THE SALVATION ARMY TO IMMEDIATELY RESPOND TO THE NEEDS OF SURVIVORS.” — ASHLEY JONES

Habitat for Humanity of Collier County was granted more than \$730,000 to repair and rebuild homes, as well as elevate homes in Everglades City that are in danger of flooding from future storms.

Habitat Chief Executive Officer Reverend Lisa Lefkow said an estimated 1,000 Habitat homes are in need of roof repairs ranging from new shingles to a complete replacement. However, this summer, some homeowners were still waiting to hear back from their insurance companies before moving forward. And in Everglades City, where the cost to elevate a home runs up to \$90,000, structural and soil boring assessments were still underway. According to some estimates, recovery will take up to five years.

Kirk remains amazed at the flexibility the Collier Comes Together Fund provided in tackling a diverse array of needs, as well as donors’ generosity. The swiftness and flexibility of the Fund “were important to us in trying to respond quickly to a mixed set of repairs,” he said. “Before we started, the Community Foundation asked us what we felt our community needs were. The Foundation was open to all ideas.”

A COMMUNITY'S CHANGING NEEDS

Focusing on the demand for increased mental health therapy, housing affordability, and increased access to technical education

The Community Foundation of Collier County partnered with the Richard M. Schulze Family Foundation on the 2017 Collier County Community Needs and Assets Assessment to identify and quantify the community's assets and most pressing issues.

The Community Needs and Assets Assessment was a comprehensive effort that brought together almost 4,000 experts, residents, stakeholders and nonprofit leaders—combined with the analysis of existing data and studies—to prioritize strategic grant-making and spur innovative tactics for addressing those needs. Mental health, housing affordability and more access to technical education rank high on the list of priorities.

"The Community Foundation is very innovative concerning their outreach to the community, and that makes us excited and happy to partner with them," said Schulze Foundation Florida Director Mary Beth Geier.



Clinicians at David Lawrence Center discuss treatment with a patient that was made possible by a Community Foundation grant.

“OUR BIG PICTURE IS TO IMPROVE THE COMMUNITY BY WORKING WITH EACH OTHER HAND-IN-HAND.”
— MARY BETH GEIER



dent/CEO Michael Dalby. The results of the study are expected to be presented to the Community Foundation by the end of this year.

Another grant was enlisting the nonprofit Ability Housing, Inc., to analyze and propose potential locations for the development of affordable and essential service personnel housing on sites owned by Collier County.

Third primary emphasis is on mental health services. Collier County woefully lacks in its ability to provide treatment: The ratio of mental health providers to the population is 977:1 compared to the state's proportion of 689:1. This translates into a 30 percent shortage across the board, though services are even more limited for the uninsured and Medicare and Medicaid recipients.

David Lawrence Center was granted \$20,000 to expand professional training to provide enhanced therapy to children admitted to its crisis unit. Juvenile committals rose 170 percent in the past five years in Collier County—the highest in the state—and transfers through law enforcement have skyrocketed. Nonetheless, 40 percent of Baker Act patients were transferred out of the county due to lack of bed space. "We have a major need for treatment beds and staff that go along with that," said David Lawrence Center CEO Scott Burgess. "We are at peak capacity virtually every day."

Geier is pleased that participants surveyed for the assessment are unified on priorities. "We're all on the same page on what the needs are in the community, which gives us a solid place to start and a strong foundation to build on," she said. "Our big picture is to improve the community by working with each other hand-in-hand on some of these initiatives moving toward a brighter future."

The Community Foundation's Changing Needs Fund—established in 1985 as a visionary way to address emerging gaps or issues—made grants that aim at these three significant issues impacting the community today and well into the future.

One Changing Needs grant is funding research for a potential new "tech education

center of the future" that provides highly specialized workforce training. The study is being conducted by Hodges University and the Greater Naples Chamber of Commerce. "It's a means of approaching the next economy—to get out in front of the new economy, develop a strong workforce, and attract those businesses to our area," said Chamber Presi-

THE IMPORTANCE OF TRANSPARENCY

The Community Foundation of Collier County adheres to the highest standards to operate in the public view and public interest. Our most current financial information is updated quarterly and always available for review. On our website, we make available for public inspection the last three years of financial statements, Internal Revenue Service form 990 and Form 990-T (if applicable), and our Letter of Determination. You may also visit GuideStar at guidestar.org for more information about the Community Foundation.



Excellence. Accountability. Impact.™



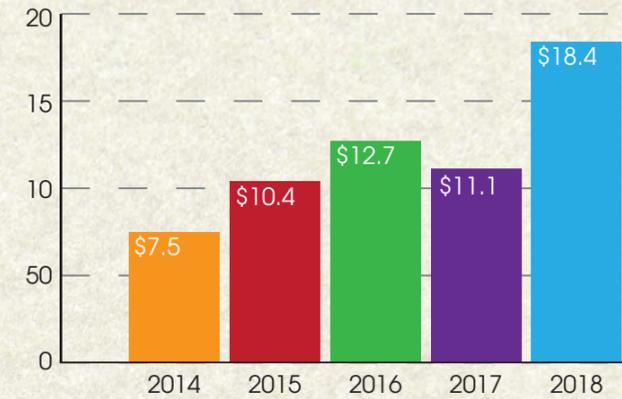
ASSETS	2018	2017
Cash and Cash Equivalents	\$7,754,381	\$21,529,581
Investments	\$159,018,544	\$128,835,641
Split/Beneficial Interest Receivable	\$2,243,283	\$2,200,113
CGA Investment Account	\$549,541	\$605,839
Pledges Receivable	\$11,796	\$228,661
Other Receivables, Prepaids and Debentures	\$140,621	\$140,702
Property and Equipment, Net	\$2,101,192	\$2,187,675
LLC Property and Equipment, Net	\$1,689,664	\$1,724,142
Total Assets	\$173,509,022	\$157,452,354
LIABILITIES AND NET ASSETS		
LIABILITIES		
Loan Payable	-	\$90,543
Payables & Accrued Expenses	\$357,401	\$230,001
Funds Held for Agencies	\$55,697,656	\$51,490,032
Annuity Obligations	\$351,333	\$446,657
Total Liabilities	\$56,406,309	\$52,257,233
NET ASSETS		
Unrestricted		
Board Designated Endowment Funds:		
• Designated for Specific Nonprofits	\$19,580,907	\$18,640,282
• Designated Grantmaking	\$13,981,594	\$11,995,008
• Administrative and Program Endowment	\$1,533,428	\$1,483,021
• Scholarship	\$6,224,178	\$5,039,418
• Field of Interest	\$5,166,311	\$5,220,291
Total Board Designated per Donor Request	\$46,486,418	\$42,378,020
Donor Advised	\$57,75,003	\$50,318,507
Supporting Orgs and LLCs	\$5,119,320	\$5,077,556
Operating and Unrestricted Reserve	\$1,217,215	\$794,595
Designated for Property and Equipment	\$3,818,828	\$3,937,790
Reserve for CGA Obligations	\$198,208	\$159,182
Total Net Assets	\$114,595,992	\$102,665,650
Temporarily Restricted		
Campaigns and Projects	\$263,356	\$329,358
Split Interest Agreements	\$2,205,088	\$2,165,388
Beneficial Interest Agreements	\$38,196	\$34,725
Total Net Assets	\$117,102,632	\$105,195,121
Total Liabilities and Net Assets	\$173,509,022	\$157,452,354

**All funds are subject to Variance power*

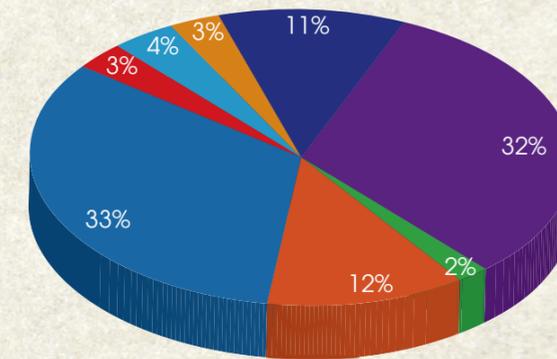
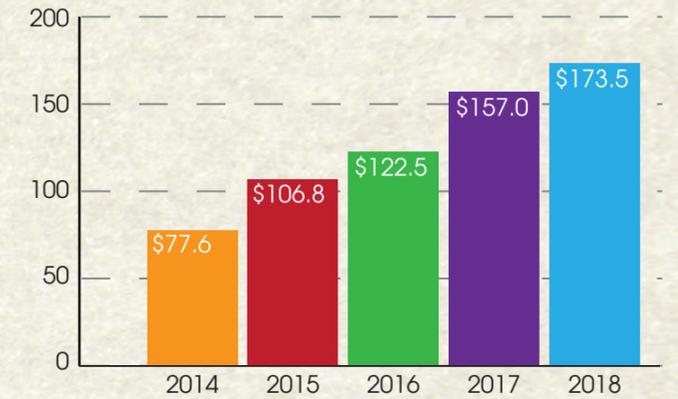
FISCAL YEAR 2017-2018

(JULY 1, 2017 - JUNE 30, 2018)

5 YEAR DISTRIBUTION HISTORY (MILLIONS)



5 YEAR FY GROWTH IN ASSETS (MILLIONS)



2018 ASSETS BY FUND SUB-TYPE

FUND SUBTYPE	ASSETS
Agency	\$55,707,656
Deferred	\$2,792,824
Designated	\$21,146,354
Donor Advised	\$57,781,303
Field of Interest	\$5,336,181
Scholarship	\$6,309,242
Supporting Organization	\$5,052,921
Unrestricted	\$19,382,541
TOTAL	\$173,509,022

TOTAL 2017-18 GRANTS & DISTRIBUTIONS



2017-2018 CFCC COMMITTEES

2017-18 TRUSTEE EMERITI

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ROETZEL & ANDRESS, LPA

Mary Lynn Myers
EX OFFICIO/CFCC BOARD CHAIR

Jerry Tostrud
EX OFFICIO/CFCC BOARD CHAIR-ELECT



COMMUNITY FOUNDATION FUNDS

Community Impact Fund (Changing Needs Fund)
Program & Operations Fund (CFCC)
Arts Fund
Environment Fund
Basic Needs Fund
Disaster Relief Fund
Education Fund
Healthcare & Mental Health Fund

AGENCY ENDOWMENT FUNDS HELD BY CFCC

ANIMALS

Humane Society of Collier County

ARTS/CULTURE

Big Cypress Chapter Daughters of the American Revolution
Classic Chamber Concerts
Golisano Children's Museum of Naples
Gulfshore Opera
Marco Island Center for the Arts
Naples Concert Band
Naples Historical Society
Naples Music Club
Naples Orchestra and Chorus
Naples Players KidzAct
Opera Naples
SWFL Symphony Orchestra and Chorus
United Arts Council

EDUCATION

Able Academy
Bentley Village Foundation
Books For Collier Kids
Champions For Learning
Collier Childcare Resources
Collier County School District Entrepreneurship Program
Community School of Naples
Culinary & Hospitality Education Foundation
Founders Fund
Friends of the Library of Collier County Foundation
Fun Time Early Childhood Academy
Gargiulo Education Center

Grace Place for Children & Families
Guadalupe Center
Junior Achievement of Southwest Florida
Literacy Volunteers of Collier County
New Horizons of Southwest Florida
RCMA
St. Ann School Foundation
The Immokalee Foundation

ENVIRONMENT

Conservancy of Southwest Florida
Everglades Foundation
Friends of Rookery Bay
Naples Botanical Garden

HEALTH

Alzheimer's Support Network
Avow
Cancer Alliance of Naples
David Lawrence Foundation Mental Health
Florida Lions Eye Clinic
Foundation of Collier County Medical Society
Golisano Children's Hospital of SWFL
Hazelden Betty Ford-Naples
Mental Health Association of Southwest Florida
NAMI of Collier County
Parkinson Association of SWFL
Planned Parenthood of Southwest and Central Florida
Protected Harbor
Senior Friendship Centers Foundation

HUMAN SERVICES/BASIC NEEDS

Baby Basics of Collier County
Catholic Charities of Collier County
Collier County Florida Special Olympics
Collier Harvest Foundation
Dr. Piper Center for Social Services
Goodwill Industries of Southwest Florida
Greater Marco Family YMCA
Greater Naples YMCA
Habitat for Humanity of Collier County
Harry Chapin Food Bank
Laces of Love
Lighthouse of Collier, Inc.

AGENCY FUND LIST

Meals of Hope
Naples Senior Center at JFCS
Pregnancy Resource Center of SWFL
Project Help
Shelter For Abused Women & Children
St. Matthew's House
STARability Foundation

PHILANTHROPY & VOLUNTEERISM

Collier County 100 Club
The League Club
Marco Island Rotary Club Foundation, Inc.
Naples Junior Woman's Club
Naples Lions Club
The Rotary Club of Naples
Zonta Club

RELIGION

Celebration Community Beach Church
Moorings Presbyterian Church
Naples Jewish Congregation
Temple Shalom

WOMEN & GIRLS

Women's Foundation of Collier County
Women's Fund of SWFL

YOUTH & CHILDREN

Children's Advocacy Center of Collier County
Collier County Junior Deputies League, Inc.
Friends of Foster Children Forever
Girl Scouts of Gulfcoast Florida, Inc.
Girls on the Run of SWFL
Naples Children & Education Foundation

The funds listed are managed by the Community Foundation of Collier County (CFCC). Gifts made will be invested in an endowment fund to support the agency. CFCC retains the explicit authority to redirect the funds to another beneficiary without prior approval if the agency ceases to exist or if distribution to the organization becomes unnecessary, impossible or inconsistent with the needs of the community.

Funds received by the Community Foundation of Collier County as of **July 9, 2018**.
For more information, please call **239.649.5000** or visit **cfcollier.org**



Leaving a Legacy

The Legacy Society recognizes and honors individuals who are planning for gifts today that will provide significant benefits to our community in the future. Thank you to the many donors who have planned a gift to the Community Foundation of Collier County in their will or estate plans. We celebrate your generosity, and thank you for sharing in the mission to improve the quality of life in Collier County.

2017-18 LEGACY SOCIETY

Ms. Patricia Aiken-O'Neill
 Mr. Marcelo Alvarez and Mrs. Betty Alvarez
 Ms. Bridget Bannon
 Mrs. Jane Billings
 Ms. Huguette L. Castaneda
 Mr. Ansel M. Chandler
 Mrs. Patricia A. Daniel
 Mr. and Mrs. James F. Derham
 Mr. and Mrs. Louis H. Dingerdisen
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 Mr. and Mrs. Samuel L. Finkelstein
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 Mrs. Betty Lee Gates
 Mr. and Mrs. James R. Gibson, Jr.

Mrs. Christine Ginos
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 Mr. Dietrich E. Zimmerman

If the Community Foundation of Collier County is in your will or other estate plans, please let us know. Even if you wish for your gift to remain anonymous, it is important for us to know your intentions and ensure your bequest is worded correctly.

For more information about planned giving, please contact the Community Foundation at 239.649.5000 or visit cfcollier.org/plannedgiving.

BMO PRIVATE BANK



“BMO Private Bank is proud to support the Community Foundation of Collier County. Giving back to our community is an important part of what we do and the fabric of our corporate culture.”

— AMY L. HALE, MANAGING DIRECTOR, SOUTH FLORIDA

BMO Private Bank’s commitment to the communities it serves extends far beyond serving its client’s financial needs. BMO is dedicated to making a difference in the lives of women. BMO has created a specialized banking division to serve women customers who manage their own money and a task force to help eliminate barriers in the workplace for women. The organization has also conducted research and developed programs to educate women on relevant issues.

Whether you’re looking for a particular financial service or comprehensive wealth management, we can help you make informed decisions about your wealth or the wealth of your family. We can help simplify complexities and create personalized strategies to help you meet all of your financial goals. In 2018, BMO Harris Bank ranked No. 2 among 40 leading U.S. banks in an Annual Bank Reputation survey by American Banker and the Reputation Institute.

Established in 1817, BMO Financial Group is a highly diversified global financial services organization based in North America. The bank offers a broad range of retail banking, wealth management, and investment banking products and services to more than 12 million customers.



801 Laurel Oak Drive, Suite 600, Naples FL 34108
 239-592-2470
bmowealthmanagement.com

BOND, SCHOENECK & KING, PLLC



“Bond has called Naples home for more than 40 years and we gladly put resources, people and financial, toward the betterment of the community. Being a corporate partner of the Foundation is a capstone commitment for us.”

— JIM MOREY, OFFICE MANAGING MEMBER

In keeping with Bond’s core values, we are proud of our relationship with the Foundation. Our lawyers and staff are dedicated to serving the communities in which we live and work. Supporting the Foundation is a perfect match.

Our commitment to community and professional service attracts a diverse client base of individuals, businesses, government agencies, and community organizations in matters of real estate development; residential purchase and sales; high net worth trust and estate planning; tax compliance and financial planning; commercial litigation; probate and trust litigation; employment and general trial advocacy; and corporate transactional work.

The professionals at Bond look forward to continuing our sponsorship of the Foundation and to ensuring dedicated service to our clients and the community.



801 Laurel Oak Drive, Suite 600, Naples FL 34108
 239-592-2470
bmowealthmanagement.com

CORPORATE PARTNERS

CICCARELLI ADVISORY SERVICES



“Our partnership with the Community Foundation of Collier County provides us with vital resources that enrich our client’s experiences and empower our team to bring their philanthropic visions to fruition.”

— KIM CICCARELLI KANTOR, PRESIDENT & CO-FOUNDER

Community defines us. These three powerful words are prominently displayed in our office. At Ciccarelli Advisory Services, “community defines us” is more than a feel-good phrase. Its meaning encapsulates our firm’s deep roots within the community and characterizes our continuous dedication to serving families.

For 35 years, CAS has fostered a culture of charitable engagement that promotes the long-term wellness of our Naples community. Our team of advisors strives to fulfill the altruistic vision of our client-families by transforming their generosity into meaningful philanthropy.

We cherish the ongoing relationship between CAS, our clients, and the Community Foundation of Collier County, which provides hope and support to members of our community who need a helping hand. Together we shall persevere in our pursuit of the greater good.



9601 Tamiami Trail N., Naples FL 34108
239-262-6577
www.CASMoneyMatters.com

FINEMARK NATIONAL BANK & TRUST



“At FineMark National Bank & Trust, we understand the importance of developing charitable partnerships to enhance the communities we serve. We are fortunate to be in the position to give our time and resources, and we believe it is our responsibility to do so generously. We have witnessed firsthand the powerful and beneficial effects philanthropy has on charitable organizations and the people they assist.”

— ADRIA D. STARKEY

EXECUTIVE VICE PRESIDENT & PRESIDENT, COLLIER COUNTY

At FineMark National Bank & Trust we are committed to making a positive impact in the communities we serve. We believe it is our responsibility to help where help is needed. As a company, and as individuals, we give our time and money, not because it is the expectation, because it is the right thing to do. FineMark is honored to collaborate with the Community Foundation as its mission of connecting donors to community needs and providing leadership on critical community issues. Last Fall, after Hurricane Irma struck the area, FineMark was eager to assist the Foundation by supplying more than 600 gift cards to those in need. At FineMark, we understand the importance of giving back to the community and have the ability to act quickly and provide resources to those in need.



800 Laurel Oak Drive, Suite 101, Naples FL 34108
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www.finemarkbank.com

GULFSHORE INSURANCE



“Giving back to the community is an everyday part of what we do at Gulfshore Insurance. Our corporate commitment is complemented by the individual and group efforts of our employees, who are known for their generosity towards causes they believe in.”

— BRAD HAVEMEIER, PRESIDENT

Gulfshore Insurance recognizes that healthy, thriving communities depend on involved citizens, organizations, and corporate partners for momentum. As a community-based agency, we are committed to creating meaningful change in Collier County through community leadership, employee volunteerism, and fundraising support. The Gulfshore Insurance “Helping Hearts, Helping Hands” Humanitarian Foundation places emphasis on not-for-profit programs that serve the needs of our local community. Every community has its own challenges, and we always strive to be part of the solution!

Gulfshore Insurance has been building relationships and trust in Southwest Florida for nearly 50 years. Today, we have more than 130 professionals working to assist our clients to manage their business and personal risk.



4100 Goodlette Road, Naples, FL 34103
239-261-3646
Gulfshoreinsurance.com

NORTHWESTERN MUTUAL



“As a philanthropist, I have focused my efforts and financial support toward those organizations that have an impact on children’s lives through education, access to healthcare, and a safe environment to grow and develop into their full potential.”

— JERRY F. NICHOLS, CPA, CLU, CHFC

WEALTH MANAGEMENT ADVISOR, NORTHWESTERN MUTUAL

As professional advisors at Northwestern Mutual, we provide planning and guidance for our personal and business clients through insurance services and wealth management. We encourage our clients to think about gifting during their lifetime to enjoy the impact it will have on the lives of those individuals who received a lift up. Whatever your passion, you can get more accomplished and have an immediate impact on those in need today, rather than waiting for tomorrow.

Through the Community Foundation of Collier County and other charities, our clients can fund a legacy of their own in the community where they live.



9130 Galleria Court Suite 200, Naples, FL 34109
239-403-4311
jerry-nichols.com

NAPLES ILLUSTRATED



VICKI BAKER, CHARLIE McDONALD PHOTOGRAPHY

“We are privileged to live in one of the most philanthropic communities in the country. For nearly 30 years we have watched the Community Foundation of Collier County expertly manage the funding for nonprofits to best enhance the needs of so many in our community. We are honored to partner with such a distinguished organization.”

— KALEIGH GROVER, PUBLISHER

At *Naples Illustrated*, we believe community involvement is at the core of being a good corporate citizen. NI is honored to support the Community Foundation of Collier County and its efforts in making Naples a great place to live, learn, and thrive.

For more than 20 years, Naples Illustrated has captured the imagination and attention of an extraordinary audience with a magazine that exemplifies a life well lived. Residents and visitors alike recognize NI as Southwest Florida’s leading authority on the arts, entertainment, fashion, dining, and home trends.

NAPLES ILLUSTRATED

3066 Tamiami Trail N., Suite 102, Naples, FL 34103
239-434-6966
naplesillustrated.com

NORTHERN TRUST



“We are dedicated not only to meeting the needs of our clients and shareholders but giving back to the communities we serve.”

— CHARLIE MUELLER, WEST FLORIDA PRESIDENT

At Northern Trust, philanthropy is a critical component of corporate social responsibility, which includes a focus on community affairs, diversity and inclusion, environmental awareness and socially responsible investing. Northern Trust is honored to be a Corporate Partner with the Community Foundation of Collier County. We are pleased to support an organization so beneficial to a broad spectrum of organizations.

In addition to Northern Trust’s local corporate contributions, Northern Trust employees have personally given of their time, talent and funds to help support the substantial range of worthy organizations which benefit our southwest Florida community.

Northern Trust remains entirely focused on providing our clients, respected local professionals and community organizations with integrated wealth management solutions of financial planning, investment management, private banking and trust and estate services.



4001 Tamiami Trail N., Naples FL 34103
405 Eighth Street S., Naples, FL 34102
239-262-8800
northerntrust.com

WATERSIDE SHOPS

Set in the ultra-exclusive city of Naples, Waterside Shops is a collection of the finest luxury brand retailers and offers elegant dining options in a tranquil, outdoor environment. Anchored by Saks Fifth Avenue and Nordstrom, the center is home to more than 60 stores including Gucci, Louis Vuitton, Tiffany & Co., Van Cleef & Arpels, St. John, MaxMara, Tesla, and True Food Kitchen. A truly sublime experience, visitors can wander past cascading waterfalls, lush flowering plants, and dramatic architecture all under the canopy of towering royal palm trees.

25

WATERSIDESHOPS

years

4100 Goodlette Road, Naples, FL 34103
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“Waterside Shops has been partnering with the Community Foundation of Collier County for over a decade. We’re delighted to continue our support of this organization that does so much for our community, especially through their Women’s Foundation. Our visions align in our efforts to improve the quality of life for everyone in Collier County.”

— ANNE FLEMING, GENERAL MANAGER

WE INVITE YOUR SUPPORT

The staff of the Community Foundation of Collier County is ready to work with your company on corporate philanthropy and programs. The Community Foundation convenes, collaborates and connects to help your company make a meaningful impact in this community and around the world.

Creating a **Corporate Advised Fund** with the Community Foundation of Collier County (CFCC) is an easy and efficient way for your company to give back. Your corporate committee makes recommendations on all grants to charities. We manage the fund administration, investments and vetting of the nonprofit organizations for you. Our staff may also partner with you to design a program that is uniquely tailored to your objectives and culture.

Positive growth in any community begins with its young people. CFCC can help

you start a **Corporate Scholarship Program** to defray the cost of higher education for employees and their family. Funds can help students from a particular school or area, provide financial assistance to those pursuing a specific field of study or assist those most in need.

Although it is impossible to predict Collier County’s future challenges, you can help the Community Foundation ensure our community has the resources to meet the unimagined needs of generations to come. The Community Foundation has many ways your clients can donate to our **Changing Needs Fund** to make a lasting impact on our community.

We can help you establish a donor-advised fund, corporate scholarship, or contribute to the Changing Needs Fund. Call the Community Foundation at 239-649-5000 to start the conversation.

COMMUNITY FOUNDATION STAFF

The Community Foundation of Collier County has a dedicated, professional staff that can help you make the most of your giving.

Eileen Connolly-Keesler
President/CEO

Sharon Bayata
Education/Scholarship Director

Mary George
Vice President of Community Grantmaking

Dawn Grundeman
Administrative Assistant

Lisette Holmes
Chief Financial Officer

Ann Hughes
Director of Donor Services

Louna Jacques
Scholarship Assistant

Eric Kingsley
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