

Early Community Foundation grants supported education like this science education grant to Naples High School.

Community Treasure

Launching a community foundation in Naples required patience and hard work, and the fruits of those labors continue to blossom.

November 1985 marked a milestone in Collier County history: the birth of the Collier Community Foundation.

Since then, the Foundation has granted \$255.6 million to local charities, causes, and collaborations, and it seems like this community partner that works with donors and

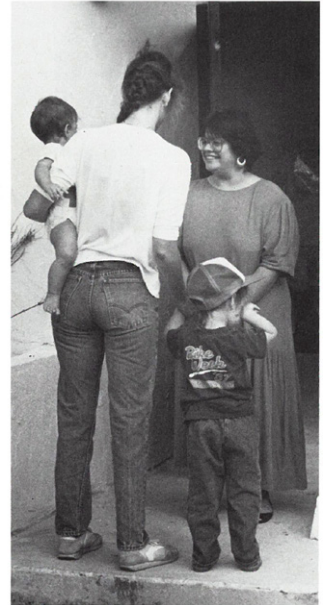
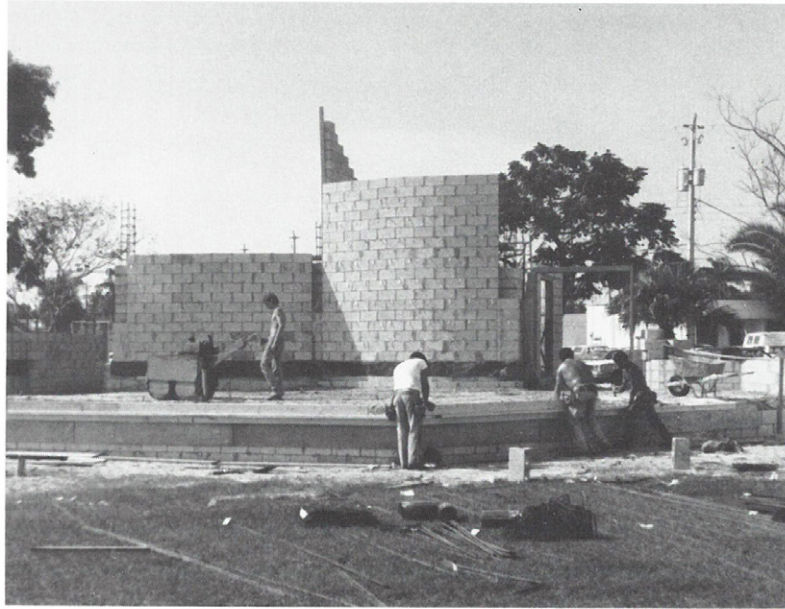
provides local leadership is a natural treasure that's been here all along.

In 1985, the concept of a community foundation was brought to town and promoted by retired Cincinnati businessman William Oberhelman and local attorney Donald T. Franke. Together they raised \$300,000 to



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The first Community Foundation grants supported the construction of the Cambier Park Bandshell and The Shelter for Abused Women & Children.

fund an endowment to create the Community Foundation. The first two awards were granted in 1986: seed money to create The Shelter for Abused Women & Children and construction funds for the Cambier Park Bandshell. Remarkably, 21 local nonprofits were awarded \$67,100 the following year.

Kevin Hale—a lawyer with a background in taxation law who became a bank executive—worked with Oberhelman, Franke, and a handful of others for two years to organize and promote the benefits of a foundation—for both the community and for personal financial planning. “I understood the benefits of the foundation,” Hale said. “We spent a lot of time working with estate-planning attorneys in town to make sure they understood it. We had so many people moving here who loved living here and wanted to support the community but didn’t know how because they didn’t know the local charities.”

Hale said the Foundation team discussed with newcomers how supporting the local community could be part of establishing Florida residency. “The attorneys doing estate-planning work consistently made recommendations on what charities to support in town. We went to them and said, ‘Use the Community Foundation for your clients to park their donations, get charitable tax deductions, and help make decisions where they want their money to go with the help of a grantmaking committee pointing out where there are needs.’”

Hale’s bank, Naples Federal Savings and Loan, provided free office space for five years at the bank’s mortgage office annex behind the iconic restaurant St. George and the Dragon, located then at 936 Fifth Ave. S. At the same time, Naples Federal, First National Bank of Naples, Barnett Bank, and Citizens National all chipped in to fund the Foundation’s first five years of operations.

In 1988, Beverly (Gifford) Smith was appointed as volunteer executive following co-founder Oberhelman’s two-year volunteer reign at the helm. “I had no business experience whatsoever,” she recently recalled.

In 1989, the Foundation formed an advisory board to undertake a significant project the Collier Community Foundation continues today: assessing short- and long-term needs in the community. The first paid executive director, Barbara J. Kent, was appointed in 1999, and the Foundation moved to a second-floor office near Marissa Collections. Smith recalls that, as the space was being remodeled, “there was something like 50 phone outlets. We figured it was a bookie joint.”

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Smith is self-effacing about her involvement, but she had arrived in Naples with experience with the Rochester Female Charitable Society in New York, founded in 1822. She began volunteering at the Conservancy of Southwest Florida, where she met the Oberhelms. “I had a little bit of experience with foundations but not much,” she said. Given the tight budget, she remembers “running by the seat of my pants” because “the thought was you spend as little as possible for administration, which is wrong, but we didn’t know better. The thought was to hold on to the money to give more grants.”

Hale served as the board treasurer for several years and as the third chair of the board of trustees. “It was humble beginnings. We really operated on a shoestring,” he said. “We were fortunate in Naples that we had people moving into the area that had the ability to understand and financial means to support a community foundation. We had a big celebration when we got to \$1 million in assets.”

Smith said the next goal was \$5 million, the going rate to establish more credibility. “We were relying on friends and people in Port Royal to get to \$5 million,” she said. And the needs were significant. “We had a grantmaking committee, and what little money we had to give away...we had to have a box of Kleenex when we met to choose the charities. The stories were heart-wrenching.”

To leave the world a bit better, whether by a healthy child, a garden patch or a redeemed social condition; to know even one life has breathed easier because you have lived; this is to have succeeded.

—Ralph Waldo Emerson

Even today, Hale said, “it’s still a difficult concept for people to understand how a community foundation works,” and he’s happy to explain when the issue arises. He’s also impressed with how far the Collier Community Foundation has come: “It’s amazing what everyone’s accomplished.”

An Evolving Foundation

In March 2022, the Community Foundation of Collier County announced its new name—Collier Community Foundation—following the approach many other foundations follow. The shorter title “will be easier for our priority audiences to remember,” the Community Foundation noted in announcing the name’s evolution. It also works with donors and grantee partners far beyond the county line. This new name emphasizes the Foundation’s knowledge of the community. A new tagline conveys its role as the trusted leader in identifying and responding to critical needs. The grant oversight, personalized service, and the diverse populations and needs of the communities the Foundation serves are wrapped up in four words: Informed giving. Powerful results.™

Today the Foundation manages about \$275 million in assets, manages more than 850 funds, and works with hundreds of nonprofits. The Collier Community Foundation can optimize your charitable giving and estate planning in Collier County and beyond.

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In the Beginning

The Community Foundation of Collier County has just celebrated its 1st birthday and we are pleased to report it is thriving. We had not envisioned being able to make grants to other agencies in this, our first year of operation, but we have! Due to substantial contributions to the Endowment Fund, enough income was generated to financially aid 7 non-profit agencies in our area from unrestricted funds and 12 others from donor advised funds. This grant making activity is described later in this report.

45 families have made donations totaling \$770,000 to establish "Named Funds" which become permanent foundation assets and will be reported, in their names, every year forever. Two of these are of a custodial nature and will be in our records as long as some of the money is in our possession. These 45 funds compose the "backbone" of the Endowment Fund and will always reflect the commitment of the donors to their community.

We are indeed grateful to the many other contributors who have added over \$10,000 to the General Fund. We encourage and welcome gifts of any size — they do add up! Participation in this program is of vital importance to the Foundation.

Non-profit organizations, approved by the Foundation, can establish an Endowment Fund in their name, to be financially administered by the Foundation. The principal and/or income may be withdrawn whenever the need arises by the donor agency. In 1986 two agencies initiated this type of account:

- Career and College Counseling Center — a professional not-for-profit community resource, providing full-time career, college and financial aid services for secondary school and college students.
- SeEsfree Training and Learning Center — provides continuing education and training for persons who have suffered head injury and related disorders. Their goal is to help each individual reach their full potential toward independent living.

Interested donors may contribute to the above tax-exempt organizations through the Foundation.

Six Naples banks have pledged their support of the operational costs of the Foundation for the first 5 years. Their dedication has made possible grant-making in 1986. Looking ahead to the years when their support ends, a drive for an Operating Reserve Fund has just gotten under way in the business community. It is hoped that an operating fund will make possible giving back to the community all of the income from the Endowment Fund. The following have pledged \$5,000 each toward this goal:

Brown Brothers Harriman & Co.
Donald T. Franke, Attorney
Frost & Jacobs, Attorneys

We thank all of our generous contributors and encourage all of you to join them in support of all fields of philanthropy: civic, education, social services, the arts, conservation and medical.

Sincerely,



Donald T. Franke
Chairman



William L. Oberhelman
Executive Director