

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

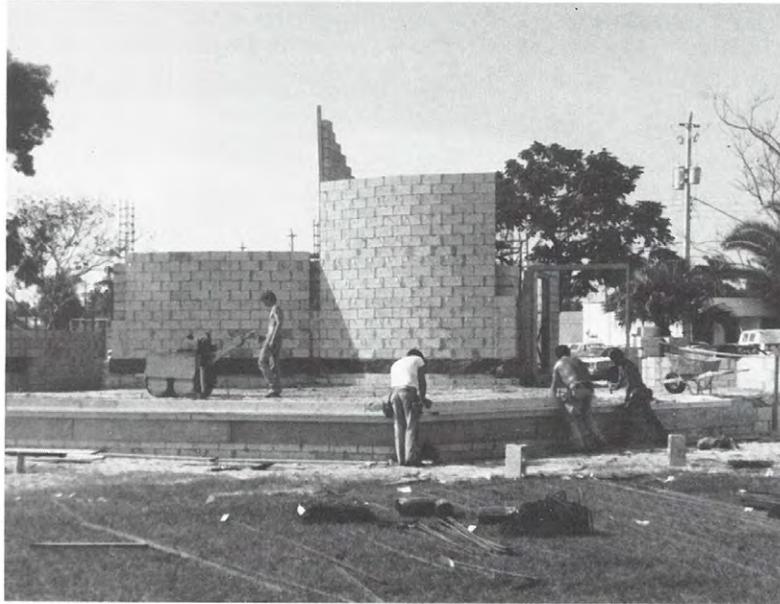
provides local leadership is a natural treasure that's been here all along.

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.”

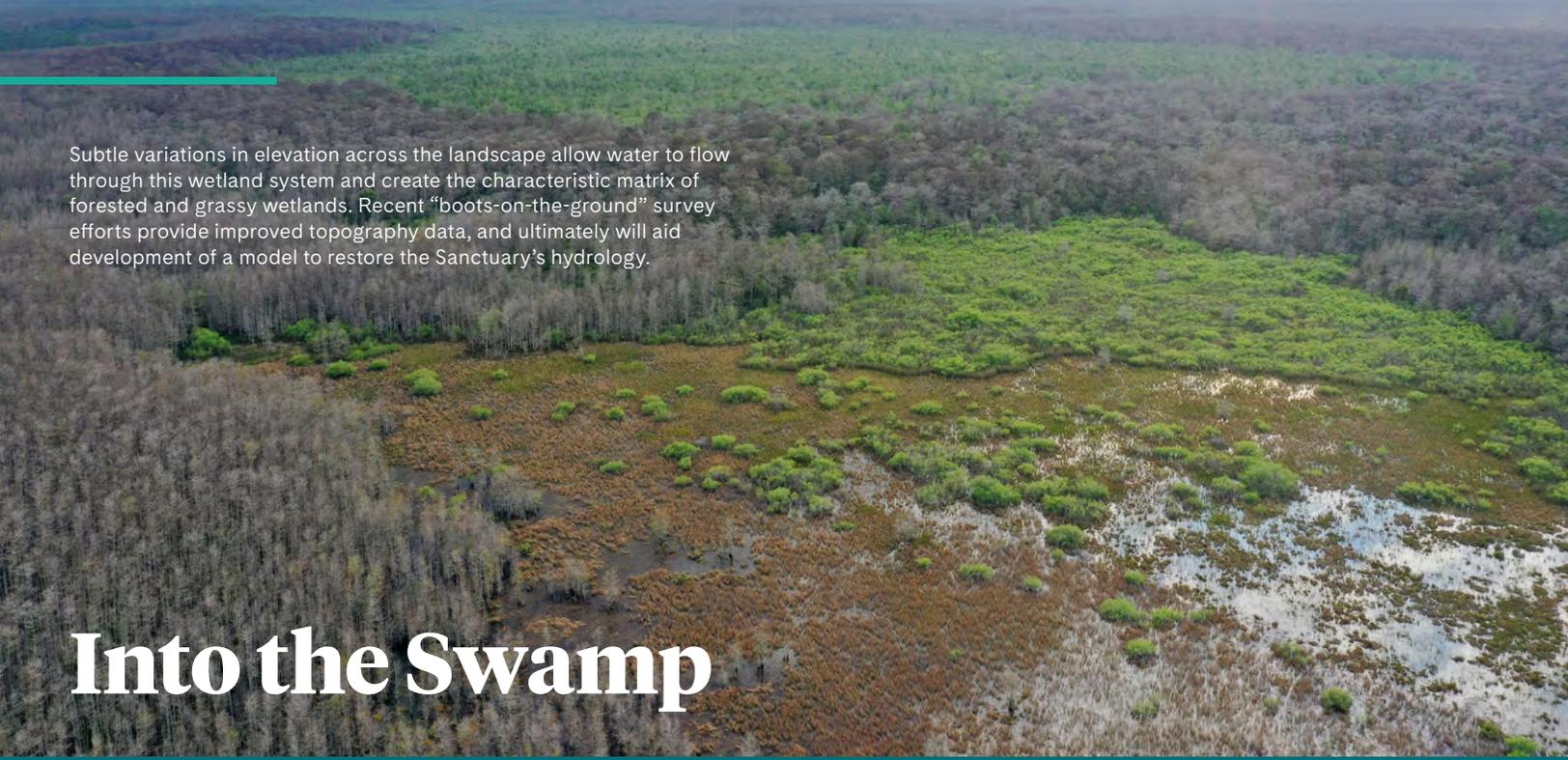
Hale said the Foundation team discussed with newcomers how supporting the local community could be part of establishing Florida residency. “The attorneys doing estate-planning work consistently made recommendations on what charities to support in town. We went to them and said, ‘Use the Community Foundation 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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Subtle variations in elevation across the landscape allow water to flow through this wetland system and create the characteristic matrix of forested and grassy wetlands. Recent “boots-on-the-ground” survey efforts provide improved topography data, and ultimately will aid development of a model to restore the Sanctuary’s hydrology.

Into the Swamp

The Collier Community Foundation is supporting hydrological studies at Audubon Corkscrew Swamp Sanctuary that will guide restoration projects.

The 13,000-acre Audubon Corkscrew Swamp Sanctuary is an invaluable water resource for Southwest Florida. The health of the swamp impacts Collier County’s drinking water supply stored in underground aquifers and the health of the Gulf of Mexico estuary and its tributaries.

But there’s a mysterious problem afoot that scientists are trying to understand and correct: Why have the water levels in the Sanctuary’s wetlands been dropping during the dry season? Shawn Clem, Ph.D., Research Director of Audubon’s Western Everglades Research Center at Corkscrew Swamp, is part of a years-long investigative team trying to find out. In order to develop accurate models to guide its restoration, the goal is to obtain complete data about this complex hydrological system, such as its depth.

The problem is over drainage. Clem said an abrupt dry-down in the swamp was documented in 2005 after canals to the south were enhanced, although “we can’t say it’s cause and effect,” she said. Nonetheless, “we live in an area where everything is very connected. We cannot move water in one place and think it’s not going to affect conservation lands. Those affects can extend a long way.”

The plan is to hold back more water to maintain healthy water levels, but current models are showing that proposed approaches might not work. And that’s for a good reason: These models rely on data from remote sensing satellites, which provide images similar to aerial photographs, to document this vast and remote habitat. Clem’s team, however, has discovered discrepancies in the swamp’s depth by as much as three feet through boots-on-the-ground research that the Collier Community Foundation previously supported.

The Community Foundation has provided past support for topographical and hydrogeological research. More recently, the Community Foundation provided a \$15,000 grant so the team can continue collecting critical data to share with the South Florida Water Management District to guide management.

The drying of Corkscrew Swamp wetlands has significant implications for ecosystems throughout Collier County, from its drinking water supplied by underground aquifers to the delivery of clean freshwater to coastal habitats, which helps combat algal blooms and red tide events. Wetlands and uplands also have tremendous water storage capacity, reduce the risk of catastrophic wildfires, and sustain wildlife and flora, including the Sanctuary’s iconic bald cypress trees.

“Collier Community Foundation funding allows our research team at Corkscrew Swamp Sanctuary to collect valuable data for restoring water levels in the swamp. However, it depends on good information to make the best decisions possible,” said Sanctuary Director Lisa Korte, Ph.D. “Every dollar counts at Corkscrew Swamp Sanctuary. Funding from the Collier Community Foundation is critical to our role of being a good neighbor in the Corkscrew Regional Ecosystem Watershed.”

Legal Life Preserver

Through Community Foundation support, Legal Aid Service of Collier County prevented 151 evictions during the pandemic and worked to establish a community-wide Eviction Diversion Program.

The lack of affordable housing in Collier County has been a long-simmering problem—one that has steadily boiled as rents in the Naples area rose almost 47 percent between March 2020 and March 2022.

“Affordable housing went from being a problem to being a disaster” during the pandemic, said Cathy Lucrezi, the supervising attorney of Legal Aid’s Housing and Consumer Law Unit.

To help residents keep their roofs over their heads, the Collier Community Foundation’s Disaster Assistance Fund provided Legal Aid Service of Collier County with a \$96,851 grant. The funds provided support for the nonprofit’s Housing, Consumer Law, Veterans, Elder Law, and Disaster Relief Unit so it could provide free legal services to desperate residents who hit hard times during the pandemic.

The grant money helped maintain the positions of two attorneys and two paralegals for a year. During this time, Legal Aid assisted 473 low-income clients facing eviction or foreclosure and those in need of legal services to address other basic needs such as food, medical care, and transportation. The 473 cases impacted the lives of

1,196 individuals and resulted in securing \$580,882.14 in benefits for these clients. Legal Aid helped clients tackle issues around collections, garnishments, bankruptcies, unemployment, food assistance, and veterans benefits and prevented 151 evictions.

Lucrezi said many of the clients protected from homelessness were the most vulnerable: single parents with minor children, disabled or infirm clients, expectant mothers, and the elderly. Lucrezi said she worked with many senior citizens on fixed incomes who were typically isolated and facing the physical demand of packing up their belongings. For example, one woman had lived in her rental for 13 years on a month-to-month basis without a written lease. She was given a 15-day notice to move out so the landlord could raise the rent and bring in a new tenant. “I have several people who fit that description,” said Lucrezi. “The demand on the eviction side grows and grows.”

In March, Legal Aid banded together with Collier County officials, the Collier County Bar Association, landlord attorneys, and other nonprofit agencies to create an Eviction Diversion Program to help renters avoid eviction and the entry of a legal judgment, which adversely affects future attempts to rent. “It’s working, and we’re proud of it,” said Legal Aid Deputy Executive Director Carol O’Callaghan. “It raises the bar for everybody, even people we don’t represent in landlord-tenant relationships. There’s no way we could have been doing that and at same time defending individuals without our supporters, and that certainly includes the Community Foundation. We want this community to know that if you are vulnerable, you have us. We at Legal Aid are often the last life preserver, and I’m glad the Community Foundation is there to support us.”



College Bound

Saruthna Fleury is the recipient of two college scholarships she discovered through the Collier Community Foundation’s Scholarship Connector.

Saruthna Fleury is eager to take the next meaningful step in her path to becoming a dental hygienist, made possible by two scholarships administered through the Collier Community Foundation.

Fleury, 20, is the recipient of the Bentley Wings Scholarship, provided to employees of Vi at Bentley Village or their family members, and the Christ Child Habitat Scholarship, given to children of local families who live in a Collier Habitat home. Fleury found these scholarships through the Community Foundation’s Scholarship Connector, a one-stop database of all locally available scholarships based on the student’s criteria.

When she was three years old, Fleury emigrated from Haiti to Collier County with her mother—pregnant with Fleury’s younger brother. Her parents moved into Habitat Collier’s Trail Ridge neighborhood while Fleury was in elementary school. She graduated in 2018 from Lely High School, where she participated in Students Working Against Tobacco and the National Honor Society and earned a 4.2 weighted grade point average.

A volunteer physical therapy program at Lely High invited students to work with football players to allow them to sample a medical career, and “I’ve always been interested in the dental field ever since I was a kid,” she said. Recently working as a receptionist at a dental office sparked Fleury’s interest in becoming a hygienist. She will begin her coursework in the fall at Florida SouthWestern State College, where she obtained her associate degree.

Her mother is a licensed practical nurse at Vi at Bentley Village, a senior living community, and she is amazed that scholarships are available for Habitat families. She is thankful for both scholarships, which will enable her to focus on her studies without holding down a full-time job to pay for college. “It would be harder to do,” Fleury said. “It would make it harder to go if I didn’t have a scholarship. I could try, but I would be working a lot more and taking less of a course load so it would take longer and be harder to do. For the next two years, it’s extremely helpful that I don’t have to stress about school because of the scholarships.”

Fleury said she’s “always been a pretty good student growing up and put in the work that needs to be done” with her mother as an inspiration. “I definitely got my work ethic from her. Watching her was very inspiring—what she could do for us.”



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.

Visit colliercf.org or call **239.649.5000** to learn more.

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.

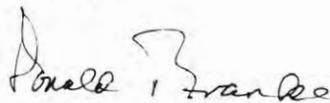
Interested donors may contribute to the above tax-exempt organizations through the Foundation.

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:

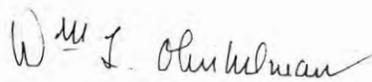
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Donald T. Franke, Attorney
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We thank all of our generous contributors and encourage all of you to join them in support of all fields of philanthropy: civic, education, social services, the arts, conservation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

Sincerely,



Donald T. Franke
Chairman



William L. Oberhelman
Executive Director

Doggone Pet Overpopulation

SNIP Collier Low-Cost Veterinary Clinic spays and neuters dogs and cats and provides other care and services.

A decade ago, Tom Kepp saw an unmet need in Collier County, and he stepped up to fill it: Spaying and neutering dogs to relieve the pressure on dog rescue and shelter operations. “We can’t adopt our way out of pet overpopulation. That’s our motto. And that’s a fact,” he said. “I started doing it because no one was approaching the problem. At the time, it was about adoption, adoption, adoption—but there were not enough homes for the ones out there.”

Kepp, a native Neapolitan, began spaying and neutering stray and rescued dogs that he put up for adoption, and he worked with low-income families to take care of and return their reproductive-age dogs. Today, the project he started in the Bayshore area has evolved into SNIP Collier Low-Cost Veterinary Clinic, which became a 501(c)3 in 2019. The clinic offers spaying, neutering, vaccinations, and exams for both dogs and cats. It is open five days a week to the public.

The SNIP team works with families to foster pregnant canines and put their puppies up for adoption through the Gulf Coast Humane Society in Fort Myers and Cape Coral Animal Shelter & Veterinary Clinic. The canine mother is then returned to her family. The organization also traps, neuters, and returns feral cats to their neighborhood and facilitates animal rescues.

SNIP was the recipient of a \$6,000 Collier Community Foundation grant for its Helping Paws Medical Fund and spay and neutering program. The financial support is vital for the grassroots nonprofit, and so is the organization’s guidance from the Community Foundation during the past five years. “They have been very supportive of us. They guided me through building this organization and supported us with finances and getting our name out to donors who support what we do,” Kepp said. “They’ve been good mentors.”

SNIP plans to open a pet surgery, rescue, and education center on a three-acre site in Immokalee. When Kepp began this work in 2013, he counted 35 canine clients. After opening the clinic in 2021, 2,015 dogs and cats were spayed and neutered. Last year, SNIP assisted 130 pregnant dogs, which Kepp affectionately calls moms, and puppies. “I still like to crawl under trailers and go out in the field,” Kepp noted.



Dogs (and cats) that have recently been rescued by SNIP and saved with the Helping Paws Medical Fund.



The Joy of Reading

Books for Collier Kids is expanding its impact with the help of the Community Foundation.

Books for Collier Kids provides free books to pre-kindergarten through second-grade students at Title 1 Collier County elementary schools, where 75 percent or more of the students' families are financially disadvantaged.

A Collier Community Foundation grant is helping Books for Collier Kids expand its program to Big Cypress Elementary School. According to Collier County Public Schools, 62 percent of the children at Big Cypress are economically needy based on free and reduced-cost meals provided.

Since receiving the \$10,000 grant, Books for Collier Kids has been able to give 420 Big Cypress students a book each month during the 2021-2022 school year—for ten months—to build their own at-home libraries.

Sallie Williams, chair of the nonprofit's board of directors, said that even if the school falls slightly below the Title 1 threshold, the majority is low-income. "This is such a dichotomy of what people think of when they think of Naples," she said.

Literacy is one of the best predictors of a child's future academic success, perpetuating the cycle of poverty. "A lack of basic literacy skills is linked with academic failure, delinquency, teenage pregnancy, substance abuse, and unemployment," according to Books for Collier Kids.

Having books at home in the summer also inspires reading and language learning when children aren't in school. According to Books for Collier Kids, low-income students who don't have access to books suffer from "summer slide"—they return to fall classes with reading scores 30 percent lower than those with continued access to books.

Books for Collier Kids gives a new book each month—120,000 each year—to 10,000 children at

26 elementary schools in Collier County and others in two dozen organizations, including Head Start pre-K and VPK programs, Collier Habitat, Christ Child Society of Naples, Fun Time Early Childhood Academy, Youth Haven, and Grace Place for Children & Families.

In addition to Big Cypress, Williams said the organization is also trying to expand to two other elementary schools on the cusp of Title 1: Corkscrew and Lake Park Elementary. Books for Collier Kids began as a chapter of Washington, D.C.-based First Book in 2005 as a fund at Collier Community Foundation before becoming incorporated and changing its name a decade later.

Because the nonprofit doesn't hold an annual gala or major fundraiser, "we would not be able to purchase the books and get them in the hands of children who need them so desperately" without donations and grants, Williams said. She added that the Collier Community Foundation "has been supportive every step of the way."



A Family Mission Statement for Philanthropy

by Kim Ciccarelli Kantor, CFP®, CAP®

Cofounder, President and CEO of Ciccarelli Advisory Services, Inc.

We all hold a special place in our hearts for the charities and other non-profit organizations that are dedicated to serving our community. In gratitude for their admirable initiatives, many of us feel compelled to support these organizations by donating our time, talents or financial support. Whichever way you choose to pledge your support, charitable action is a truly rewarding means of expressing our altruism and impacting meaningful, positive change.

As someone who has had the privilege of working alongside many successful families in the Naples community, I have always been impressed by our clients' selfless philanthropic efforts. Above all, I have been inspired by their eagerness to engage the entire family in the charitable giving process. By unifying their family members behind a common goal, these clients have not only instilled the virtue of philanthropy within their children and grandchildren; they have established a powerful legacy that extends beyond their lifetime.

You can give your family a shared clarity of purpose that transcends generations and ensures your family members are in sync with one another with the creation of a philanthropic family mission statement. This statement can clarify what you and your family hope to accomplish through philanthropic efforts and enables you to see where you are deviating from expectations and goals so you can make course corrections. And most importantly, it strengthens the role of your family in your philanthropic activities.

Of course, the elements of a mission statement are entirely up to you and your family and may combine some or all of the following elements:

- **History of the family:** its origins, values, patriarchs, matriarchs, business interests, public service, traditions of philanthropy.
- **History of the fund:** its founders, when founded, funding source, etc.
- **The field of interest of the fund:** education, environment, etc. and what the fund intends to accomplish.
- **Program focus and specific targets of grants,** if any are to be specified and key goals and desired outcomes.

Once your family has stated their charitable goals, what is your best approach to achieve them? Though there are many ways to carry out your family's vision, partnering with a community foundation, such as Collier Community Foundation, offers some unique benefits. Community foundations bring together the financial resources of families, individuals and organizations who care about a specific geographic area and then invest those resources back into the community. Combining the pulse of the community with a deep understanding of your family's goals and desired education process can enrich your long-term legacy. With your mission statement as your guide, this culture of philanthropy has wings for multiple great deeds.

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Would you like to learn more about charitable giving but are unsure where to start? **The Nonprofit Directory** is a robust, searchable online database of local nonprofit organizations that serve Collier County, Florida. This resource helps donors and residents better understand Collier County's nonprofit community and discover how to engage in the causes they care most about. Check out the Nonprofits' Wish List tabs for funding opportunities!

[CollierCF-NonProfitDirectory.org](https://www.colliercf-nonprofitdirectory.org)

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