

**COLLIER
COMMUNITY
FOUNDATION™**

2023 COMMUNITY REPORT

Though our iconic and beloved Naples Pier was battered during Hurricane Ian, it will be reconstructed and revitalized, symbolizing the resilience and determination of Collier coming together to rebuild and restore our community and prepare for the future.

INSIDE

Learn about CCF's new
Collier Housing Impact
Investment Fund



Welcome to the latest edition of the *Community Report* from the Collier Community Foundation (CCF). This past year, we have emphasized forward thinking and how our plans today can provide long-term solutions for our community tomorrow.

Since Hurricane Ian, the now-retired name for the third costliest storm recorded, we continue to rebuild, but we also recognize the need to plan for the future. CCF raised more than \$10 million for Hurricane Ian—five times as much raised for Hurricane Irma—through our Collier Comes Together Fund. While we have made great strides in relief, rebuild, and repair efforts, we are also working on mitigation. We are thinking ahead to prepare for the next storm or disaster by raising homes and replacing storm-ravaged structures with those made to hurricane codes.

In this edition, you can read about our rebuilding progress since Hurricane Ian and other projects to lessen the effects of disasters to come, including working with the Naples Botanical Garden on a resilient dune planting project that will provide frontline protection for our coastline against future storms.

We apply this framework to every aspect of our work here at CCF. When we look at local needs, we consider where our community will be, not only five or 10 years from now but for generations to come, and how what we are doing now will make a meaningful difference in the future.

In a time when national news regularly includes coverage of airline shortages, canceled, and significantly delayed flights, we looked at the only training program offered locally for aviation mechanics. We were amazed to learn that the equipment provided for students does not meet Federal Aviation Administration (FAA) guidelines. Please read about how we support the future of flight by providing Lorenzo Walker Technical College with a helicopter, King Air twin-turboprop, and modern turbine engines, allowing students to graduate with hands-on experience to service the planes we count on for our travel.

We have also launched a multi-faceted public awareness program on the significance of the transfer of wealth, the intergenerational phenomenon in communities nationwide, including Collier County, where \$34.8 billion is expected to change hands over the next 10 years. We are spreading the word to seasonal and full-time residents and professional advisors through presentations, commercials, print ads, and various other vehicles that allocating only three percent of their estate to CCF could generate over \$50 million in grantmaking each year, supporting the programs that benefit our local youth, families, seniors and veterans, our environment, and other community needs—forever!

We continue to address local needs in these and many other ways, thanks to our generous donors, our community's support, and our board's stellar leadership. We invite you to read more and learn how you can help us continue to be the positive force in the future of Collier County.

With our sincere gratitude,



Jim Morey, CCF Board Chair



Eileen Connolly-Keesler, CCF President and CEO



Standing: Lynn Martin, Vladimir J. Mathieu, Thomas Oliveri, John M. Costigan, William Barker, James F. Morey, Jeffrey Diermeier, R. Robert Funderburg, Elizabeth T. Frank
Seated: Judy Jorgensen, Allyson Richards, Dolly Bodick Korest, Kathleen Ludwig, Myra Williams
Not pictured: Brad A. Galbraith, Jerry Tostrud, Todd Bradley, Giselle Wagner

Our Board of Trustees:

The Collier Community Foundation is governed by a Board of Trustees and committees comprised of local community leaders and philanthropy enthusiasts. A full-time professional staff administers the Community Foundation. Operating expenses are paid from management fees, through grants and partnerships with local and national foundations and organizations, and gifts designated by donors to cover CCF operating costs.

2022-2023 Board of Trustees

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 Thomas Oliveri
 Giselle Wagner
 Myra Williams

OUR MISSION:

Working with donors, we inspire ideas, ignite action, and mobilize resources to address community needs in Collier County. Informed giving. Powerful results.®

For a listing of our Trustees Emeriti, Professional Advisors Council, Sustaining Society, and Legacy Society members, please visit collierccf.org.

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In the Wake of Disaster: Building a Better Future

The Collier Community Foundation took a visionary approach to address the impacts of Hurricane Ian by helping communities rebuild—for storm resilience today and in the future

Photos by Cindi Withorn



Rooms to Go donated three semi-trucks full of furniture for the residents of River Park East who lost all of their belongings in Hurricane Ian.

When Hurricane Ian's waters receded, a new reality dawned for thousands of Collier County residents, from the shores of affluent Port Royal to the low-income River Park and into the vulnerable corners of mobile home parks and outlying island communities. With homes destroyed by mud inundation and leaking roofs, they began picking up the pieces one by one.

As dawn broke following the historic Sept. 28 hurricane—the third costliest in the United States—the Collier Community Foundation (CCF) was ready to provide direly needed emergency assistance, help the vulnerable dig out for the long-term, and strategize ways the community as a whole can rebuild sustainably to make it more resilient to intensifying storms. The Collier Comes Together Hurricane Relief Fund raised more than \$10 million, and CCF took a leadership role in assessing immediate and long-term needs. “We can react far quicker than any government agency can act,” said CCF President/CEO Eileen Connolly-Keesler. “When there’s an emergency like this, we stop and focus on those needs and gaps and move with what the community needs.”

Here are four community-based initiatives that CCF and generous donors have made possible.



A drywall installer replaces storm-soaked panels in a River Park East home.



Jaclynn Faffer, Marie Powell, Eileen Connolly-Keesler, and Christopher Lee celebrate with Marie in her beautiful new LeeCorp home.



RIVER PARK EAST: 'A RAY OF HOPE'

For the first time in a century, the historically African American neighborhood along the Gordon River with 75 single-family homes—where about 40 percent of the residents are seniors—was flooded. Traumatized residents reached out to NAACP Collier County President Vincent Keeys for help mobilizing organizations that could provide temporary homes, cleaning supplies, hot food, and water. Keeys found a strong ally in CCF, which provided emergency gift cards to 72 households to obtain basic needs.

“Thanks to the Community Foundation, we were able to hit the ground running and begin the cleanup and mitigation for many of the families,” said Keeys. The new reality’s array of issues “was overwhelming for many because it is a marginalized community. We opened Pandora’s box—they needed help from the roof on down to the ground.”

CCF paid for drywall, plaster, and labor, and coordinated the delivery of replacement furniture, which was donated from Rooms To Go, and appliances funded by generous donors. Keeys estimated that CCF helped cut a five- to 10-year recovery timeline in half. “People are moving back home, and kids are beginning to play in the community—and that’s a ray of hope,” he said. “If it weren’t for the Community Foundation, I don’t know where that community would have been.”

MOORHEAD MANOR: FIVE BRAND-NEW HOMES

CCF and the Baker Senior Center Naples partnered to create a case management position to evaluate owner-occupied senior mobile home parks and provide new manufactured homes, starting with Moorhead Manor.

An estimated 140 of the East Naples community’s 154 mobile homes were severely damaged by sewage-contaminated water. Thanks to \$1 million in CCF funding for the senior center, five 2-bedroom, 2-bath units have been replaced for full-time residents, fully furnished, in a complex process that included removing the damaged home, surveys, grading and prepping for utilities, and elevating the properties to minimize future damage.

Recipients included octogenarians Julie Fox and Charles Jacob, Baker Senior Center members who were displaced from their unlivable 49-year-old home. Marie Powell, 83, who’s lived in Moorhead Manor for 24 years, also received a new home. “There is such relief in knowing that I will be able to live here again,” she said.

Baker Senior Center Naples President/CEO Jaclynn Faffer, PhD, credits CCF for investigating the needs “of the entire community. They look for projects based on research and facts, and they fund agencies that know how to deliver. I am honored to be among that group as the place to turn when we need help for our seniors.”



Hurricane Ian devastated areas in Collier County from Everglades City to Vanderbilt Beach. Vincent Keeys headed recovery efforts in River Park East and distributed emergency gift cards to residents including Mertice Linton.



EVERGLADES CITY: MOVING ABOVE THE FLOOD LINE

Up to nine feet of surge washed over Everglades City in the hurricane. “People with elevated homes had less damage and anyone at ground level had water in their living area,” Everglades City Councilman Tony Pernas said of the community with 352 year-round residents.

Though Everglades City and its neighbors—Plantation, Chokoloskee, and Copeland—are on the remote southern edges of Collier County, they aren’t forgotten. CCF will provide \$1.6 million from the up to \$4.9 million that it has been granted in state funding reimbursements for the Collier Housing Resilience Project to raise several homes. The funding is thanks to the advocacy of State Senator Kathleen Passidomo (R-FL).

Fourteen homeowners in these vulnerable coastal communities have applied to have their homes raised through the nonprofit Communities of Everglades Disaster Recovery task force, which is working to help residents and businesses mitigate, prepare, respond, and recover from hurricanes. Pernas is the executive committee chair of the organization formed after 2017’s Hurricane Irma. “The long-term solution is to elevate your home,” Pernas said. “We’re trying to help people out, so they don’t have to go through that again.”

The elevation costs could range from \$50,000 to \$250,000, depending on the complexity of each home. Utilities are unhooked and reconnected; the homes are raised with a hydraulic jack and placed on stilts; and new foundations, stairs, and landings are constructed. Other costs include permits and an engineering inspection. In fact, a construction manager is being hired to oversee the project. Applications were prioritized for the meticulous, four-month-long process. There are 50 ground-level

homes. “Once we start and there’s a buzz, there will be lot more people interested,” he predicted.

Pernas is grateful for CCF’s insight and dedication to outlying communities. Based on past experiences, he said, disaster relief rolls in and out. “After 30, 60, 90 days, you’re on your own. But they need more than a tarp. They need long-term help to get their lives back in order.”

Now, they can.

When Connolly-Keesler reached out to Pernas, she asked about the community’s “pie-in-the-sky” solutions. It boiled down to lifting homes. “They were on board right away,” he recalled. “We’re incredibly grateful for what they have done.”

BEACH DUNES: PLANTING FOR RESILIENCY

After Hurricane Irma, Naples Botanical Garden began beach dune restoration projects in partnership with the City of Naples at three beach access points on 10th Avenue S., 11th Avenue S., and Broad Avenue S. CCF granted \$50,000 from a donor for the garden to expand this pilot program and bring in a Florida Gulf Coast University graduate student to document successes and failures. The result: areas where diverse plantings were installed fared better in the Category 5 hurricane than in areas with a monoculture (one type of plant).



The impact of the dune restoration project is already evident. Beach dune plants captured sand from Hurricane Idalia's whipping winds to build dunes that will create ecosystems for plants and wildlife.

The mixed plantings proved they were effective in reducing erosion by “acting as a refuge for other species that are now re-colonizing, stabilizing shifting sands, and naturally building dunes by catching and trapping windblown sand,” the garden reported, calling beach dunes “our frontline protection against storms and hurricanes. Beach dunes are dynamic systems that face constant forces of change but rely on a diversity of resilient plant species for quick recovery.”

CCF has granted the garden an additional \$250,000 to scale up these efforts by harvesting diverse regional native species from the wild and propagating tens of thousands of seedlings. The funding will pay for collection trips, growing materials, new staff positions to manage the process, and the establishment of experimental plots.

Naples Botanical Garden Vice President of Conservation Chad Washburn said two dozen different plants are needed for a thriving dune habitat because each performs a different function.

“Diversity really equals resiliency,” he said.

If natural restoration projects sound pricey, renourishing local shorelines—a tourism draw critical to the local economy—is much more costly. In 2021, Collier County spent \$7.6 million to renourish two eroded beaches with 318 tons of sand. The U.S. Army Corps of Engineers is analyzing \$3 billion in proposed storm-surge protection projects for Collier County and will make a final determination in February 2024.

Washburn said that CCF “has been a great collaborative partner” and this funding “provides a vital opportunity to work with community partners to ensure that our coast is resilient as we face storms in the future.”

CCF will continue to think ahead to prepare for the next storm or disaster and provide long-term solutions that will serve our community tomorrow. You can help by donating to our Crisis & Disaster Relief Fund or consider naming the Collier Community Foundation in your estate plan. Call us at 239-649-5000 to learn more.

Careers

Taking Off

CCF's half-million dollar investment in the only local aviation mechanics program will double the opportunity for students entering this well-paying, high-demand field

Airplane mechanics are in high demand in the region, and Lorenzo Walker Technical College offers the only training for this high-wage career in Lee and Collier counties.

When she toured the school, Collier Community Foundation (CCF) President/CEO Eileen Connolly-Keesler was amazed to learn there were more than 140 well-paying aviation mechanic positions open in Southwest Florida, but the program's equipment was so outdated that it didn't meet Federal Aviation Administration (FAA) guidelines. "I was shocked by what they were training on," said Connolly-Keesler, whose husband is a private pilot.

CCF has invested \$500,000 to train future Lorenzo Walker students who want to become FAA-certified as Airframe and Powerplant mechanics who repair and maintain aircraft engines, landing gear, brakes, and air-conditioning systems. CCF funding provided a new helicopter and two engines required to learn rotorcraft fundamentals and other subjects necessary to achieve training standards. In addition, private donors who give through CCF because they rely on its expertise and knowledge of the community, directed funds for the purchase of a King Air twin-turboprop, and turbine engines.

"This will be so beneficial for the mechanics being trained," said Connolly-Keesler. "We're making it a top-notch program at Lorenzo Walker, allowing students to graduate with hands-on experience servicing the planes we all count on for travel."

For a decade, identifying, developing, and providing workforce



The newly purchased King Air twin-turboprop will provide hands-on learning for aviation mechanics students, enabling them to enter the workforce with real-world skills upon graduation.



Lorenzo Walker students modify and raise the base housing the two turbine engines funded by the Collier Community Foundation to allow mobility for easy accessibility in learning rotorcraft fundamentals.

training for local students and career-changing adults has been a top priority in Collier County. Well-paying jobs and economic development—which are tied to a skilled workforce—ranked as a high priority during the recent "On the Table SWFL" community conversation that targeted trends and issues in the five-county Southwest Florida region. Training local residents for above-average-paying jobs is important to keep the economy vibrant and give them opportunities to stay in their hometown.

Collier County Public Schools Superintendent Leslie C. Ric-



Aviation mechanics students learn about the maintenance and engine repair of the newly purchased airworthy helicopter.

ciardelli, EdD, said the district is grateful for CCF's "generous and continuing support," adding that the donations will "provide a first-class educational experience for the students participating in our career and technical education programs at Lorenzo Walker Technical College."

CCF's donations give students "exactly the kind of hands-on learning opportunities that will set them up for success" to pass the three FAA exams, Ricciardelli said, "and start their careers as they enter the local aviation workforce right here in Collier County."

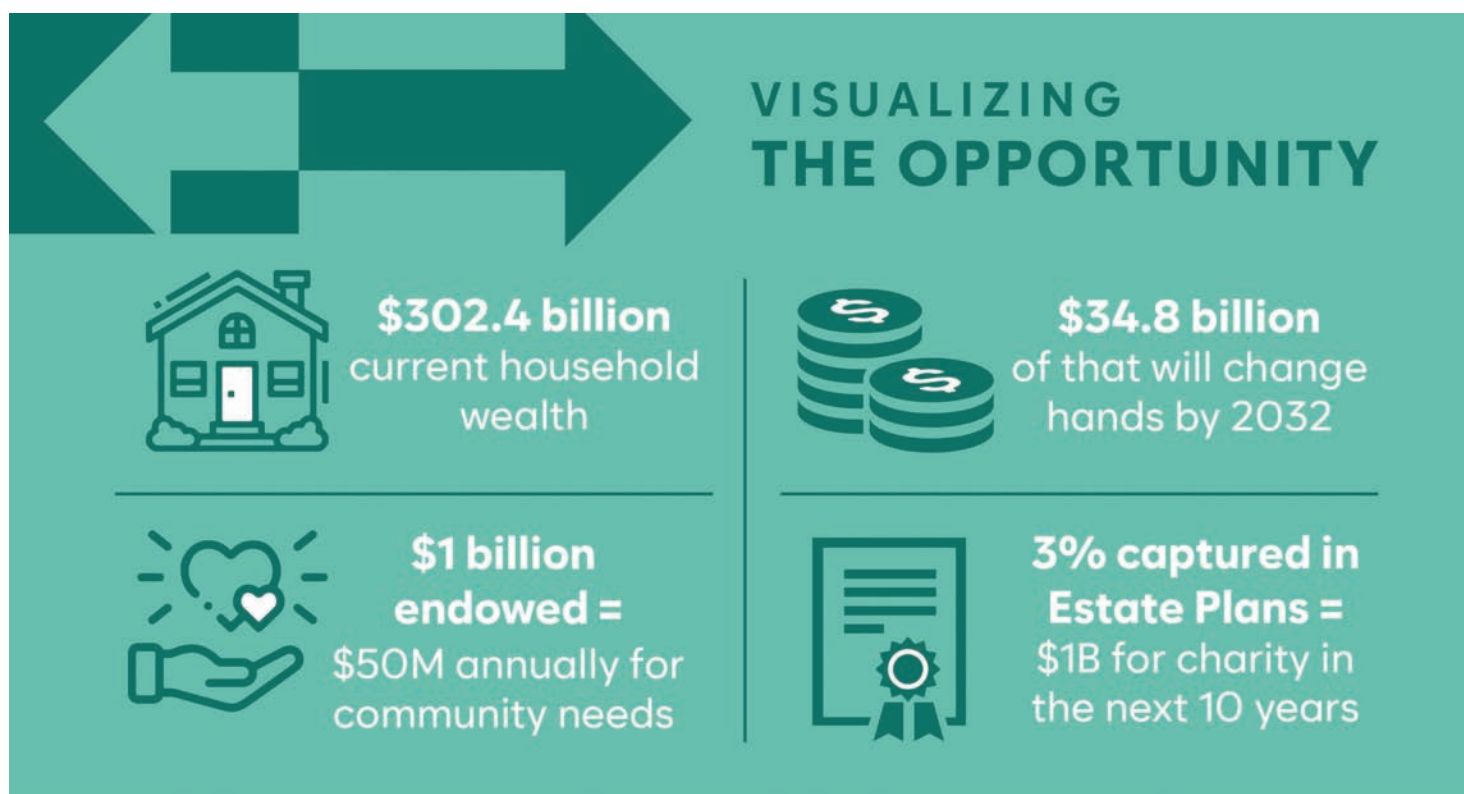
Following the 18-month aviation mechanics program, students take certification exams consisting of written, oral, and practical segments, Lorenzo Walker Technical College Director John Monda explained. Before receiving the new equipment, students were "having to learn in a theoretical manner until they demonstrated competency in a physical manner for the exam, which made it really challenging."

Monda is planning to double the program size from 25 to 50. "It's well over double what we've historically served—and that's

the result of having the equipment from the Foundation," he said.

The need to expand the program is driven by demand at regional, national, and international airports. Monda said that Southwest Florida International Airport, Airglades International Airport in Clewiston, and Punta Gorda Airport have ambitious growth plans. Miami International Airport is bustling, and there are typically jobs open at hangars throughout the region—from small, private to large commercial operations. Depending on the hangar operations size, these mechanics earn a starting annual salary of \$65,000 on average in Southwest Florida—higher than Collier County's annual per capita income of \$51,296, according to the U.S. Census Bureau.

Monda has led the college for many years and he's come to realize that "the viability of our local economy and growth depends on air travel more than I even understood. We thank CCF and our community in Collier County for supporting the instructional needs of our students and the local economy."



How Are You Planning for the **GREAT TRANSFER OF WEALTH?**

Become part of the transformative power of endowing Collier County's future and sustaining its dedicated charities

Baby boomers make up the wealthiest generation in American history, and they are passing down that wealth to their children and grandchildren during the next 25 years. How much? A staggering \$68 trillion in homes, businesses, and investments.

This remarkable intergenerational phenomenon is playing out in communities across the nation. In Collier County, \$34.8 billion is expected to change hands over the next ten years. These sums may be mind-boggling, but the Collier Community Foundation (CCF) is starting a conversation with the community to raise awareness about the transfer of wealth and the importance of including a philanthropic element in estate plans. CCF President/CEO Eileen Connolly-Keesler and her team are urging seasonal and full-time residents to allocate at least 3 percent of their estate to the Foundation to establish a \$1 billion endowment to sustain the community's social safety net in perpetuity.

Local nonprofits with the capacity to make the greatest difference in the quality of life in Collier County cumulatively must raise \$402 million annually to sustain their operations. However, interest earned on a \$1 billion endowment would only cover one-

eighth of that need, which illustrates the importance of strong funding mechanisms.

Many community foundations in the United States have \$1 billion in endowments. "One billion sounds scary, but 3 percent doesn't," said Rob Bulloch, a partner and fourth-generation estate planner at Bulloch Taylor PLLC in Naples. Collier County—where the current household net worth is \$302 billion—certainly has the same capacity to build this endowment to meet significant local needs. "There is literally unlimited charitable capacity here," he said.

Discussions about tapping a small percentage of this unprecedented wealth transfer for charity are taking place across the country and the state, said Ashley Heath Dietz, president/CEO of the Florida Philanthropic Network.

"A lot of folks who are very charitable and generous don't want their money to go to the government. That's part of the impetus of giving. You want it to go to good works and keep the money local," Dietz said. "With a community foundation, there's more donor choice. They can make a direct investment in the causes that are important to them, which is the opposite of the government."

WHY THE COLLIER COMMUNITY FOUNDATION?

CCF addresses issues as they arise without bureaucratic red tape. CCF often helps fill in local gaps where the government lacks funding by supporting projects such as partnering with other organizations on a local workforce housing development. CCF has repeatedly pivoted to disaster relief by activating the Collier Comes Together emergency fund for hurricanes Irma and Ian, wildfires, red tide, and the COVID-19 pandemic. Unrestricted funds allow CCF “to adjust in real-time for needs in the community,” Bulloch said. Today’s needs likely look far different than what they will look like 50 years from now.

In Collier County, the government sets aside only 5.6 percent of its annual budget for human services. “Even if the county budget were larger, we know how to serve the community better than anyone because we are in touch with local needs and can act quickly to distribute funds where they are needed most,” said Connolly-Keesler.

There are also several tax-advantaged strategies for donating to charity during one’s lifetime—including donating an asset such as stock, gift annuities, cash, and qualified charitable distributions from a retirement account—making charitable giving a win-win for the donor and the organization they support. “Increasingly, clients are eager to see the direct impact of their donations during their lifetime and do not want to wait until they are gone to do so,” said Bulloch.

No matter your walk in life, estate plans are essential in life and death for everyone. They ensure your assets are distributed according to your wishes and are protected from probate. They are crucial if you become incapacitated and can no longer handle your financial affairs. They are also a wealth-preservation strategy. Uncle Sam levies a 40 percent estate tax. “What goes to CCF escapes taxes during your lifetime and when you die,” Bulloch explained.

CCF is also encouraging wealth and estate advisors to have this conversation with their clients. A BOA/Merrill Lynch HNW Philanthropy study showed that 90 percent of high-net-worth households expect their advisor to bring up charitable giving. Yet, only 10 percent of advisors bring up the topic.

Donors want to support causes they care about. But sometimes, organizations close their doors or change their policies. With a CCF fund, the donor is in control of their philanthropic plan. If a nonprofit in this plan closes, the money is redirected to a similar program or nonprofit that aligns with the donor’s original intentions, so there are no surprises. “We provide the oversight to spend donors’ dollars



A Conservancy of Southwest Florida educational program.

the way they want them spent according to their estate plan,” said Connolly-Keesler. “We work with our donors to consider the what-ifs and develop a plan B and sometimes a C and a D.” In addition, CCF keeps its finger on the community’s pulse by studying local needs and demographics each year and tracking nonprofits’ effectiveness through grant and program impact fulfillment.

Whether you grew up here, started a business here, or retired here, you are invested in our community. Is it time to think about giving here? We can help you invest in the community you love and support the causes you care about most to benefit your children and grandchildren. Call us at Collier Community Foundation at 239-649-5000 to learn more.

Baby Boomers THE NEXT 10 YEARS

Over the next 10 years, the wealthiest generation in American history—Baby Boomers—will pass down this wealth to their children and grandchildren. In Collier County, it is estimated that \$34.8 billion will change hands over the next ten years. And if just 3 percent of that is transferred to the Collier Community Foundation, it could result in a \$1 billion endowment that generates \$50 million annually to address our community’s greatest needs supporting the programs that benefit our local youth, families, seniors and veterans, our environment, and other community needs— forever!

Call us to start
the conversation.



Building Sustainability for Nonprofits

For years, CCF has encouraged nonprofits to establish an endowment at the Foundation because they grow through investments and are essential to sustain operations after an unforeseen crisis, disaster, or recession. There are 93 nonprofit agency funds in place. Here is what some of them say about the importance of endowments and the great transfer of wealth.



Naples Botanical Garden Educator Joe Fagnano explains the importance of red mangroves during a Sensory-Friendly Saturday.

HOW HAS CCF BEEN INTEGRAL TO YOUR AGENCY'S ENDOWMENT FUND AND WHY IS IT IMPORTANT FOR YOUR ORGANIZATION?

Endowments are our promise to the future. The Marco Island Historical Society is currently building its endowment to clearly communicate to our donors and supporters that we will be here fulfilling our mission for generations to come—the new beneficiaries of the transfer of wealth.

The Marco Island Historical Society invests its endowment fund with

CCF as an expression of our belief in their mission of “Informed giving. Powerful results.”

—Pat Rutledge, President/CEO, Marco Island Historical Society

Having our endowment lends credibility to our organization because donors know we are here for the long term and are prepared for the unexpected. Knowing that our endowment is at a professional and reputable community foundation—with its sole mission to help nonprofits—speaks volumes. Our strategic plan has incorporated our goal to continue to grow our endowment at CCF every year.

—Ann Hughes, CEO, Fostering Success

CCF has advised on best practices and shared their fundraising and investing expertise with our board and finance committee. With the knowledge that our endowment funds are at CCF, our major donors are even more willing to continue contributing.

—Deborah R. Fidel, JD, Executive Director, Temple Shalom of Naples

Support from CCF and our agency fund is not only helping grow our endowment, but it is also providing the opportunity for philanthropists to learn about the Conservancy, its mission and the importance of receiving financial support. The Conservancy of Southwest Florida has had a long partnership with CCF. Partnerships with organizations such as CCF make us stronger. We are grateful for the support of CCF and our continued partnership.

—Paul Seifert, Vice President, Conservancy of Southwest Florida



Conservancy of Southwest Florida reef research.

WHAT'S THE IMPORTANCE OF CAPTURING SOME OF THE GREAT TRANSFER OF WEALTH TO YOUR ORGANIZATION?

As a forward-thinking organization, Guadalupe Center plans for today and the future. Our team is routinely looking decades down the road with a focus on financial sustainability. This includes recognizing the transfer of wealth to the next generation and building an endowment to meet future needs.

—Dawn Montecalvo, President/CEO, Guadalupe Center

Nonprofits like Baker Senior Center Naples need the philanthropic community's support to thrive, and perhaps even to survive. As wealth transfers to the next generation, it is our responsibility, and our opportunity, to make sure the messages about what we do resonate with a new cohort of philanthropists.

—Jaclynn Faffer, PhD, President/CEO, Baker Senior Center Naples

For nonprofit organizations, it's important to understand that this financial event is taking place and that we need to talk to our supporters about it. Over the past several years, we have guided our organization through extraordinary times: two major hurricanes and an international pandemic. We rely on Collier Community Foundation to educate nonprofits on issues such as the upcoming wealth transfer which may not be on our immediate radar.

— Donna McGinnis, President/CEO, Naples Botanical Garden



Students at Guadalupe Center are prepared for academic achievement beginning in kindergarten through high school and beyond.



Judy Barton, a Fostering Success mentor, provides guidance for a Thriving After Care program participant.



TO LEARN MORE call the
Collier Community Foundation at

239.649.5000

Impact Investment Fund



Housing Affordability in Collier County

Having a place to call home is essential for the well-being of individual families and community members and ensuring Collier County's continued economic growth and success. The effectiveness of our community's response to its housing needs will determine its future—and ensure a vibrant, diverse, and economically healthy Collier County.

As the need for affordable, stable, and quality housing options for all types of households and income levels continues to rise—so does the need for a collective response with public, private, and philanthropic alignment, action, and investment.

The Collier Community Foundation is uniquely qualified to play a leadership role in this effort. Through the newly created Collier Housing Impact Investment Fund, the Foundation will serve as the catalyst for investing in solutions to housing affordability.

With an investment of \$500,000 from our unrestricted assets, the Collier Community Foundation has launched the Collier Housing Impact Investment Fund.

We invite the community to join us as we strive for the phase one goal of \$10 million

that will set Collier County on the path to a solution to our affordable housing crisis.

- Rob Funderburg,
Foundation Board Chair

Investing in Solutions

The Collier Housing Impact Investment Fund is a revolving loan fund, for developers, designed to achieve a social and financial return by closing funding gaps that can inhibit housing affordability. Through impact investing, this innovative model provides short-term, low-interest loan capital to both nonprofit and for-profit developers. When the loans are repaid, the monies are reinvested to fund new initiatives, thus creating sustainability.

For example, a loan may be provided during pre-development (zoning, permitting, land acquisition) where projects are often delayed or derailed due to limited financing. Helping to eliminate this barrier will incentivize and increase inventory that is desperately needed today.



Call us to learn how you
can make an impact-
focused investment or scan
below and start investing



How does it work?

1

Individuals and businesses concerned about housing affordability make tax-deductible* contributions to the Collier Community Foundation to be pooled and invested in the Collier Housing Impact Investment Fund.

2

Potential projects are identified and assessed by trusted community partners and proposed to CCF for consideration.

3

Investment opportunities aligned with the community's needs are evaluated by CCF leadership and an external investment consultant ensures they meet affordability criteria and are viable solutions.

4

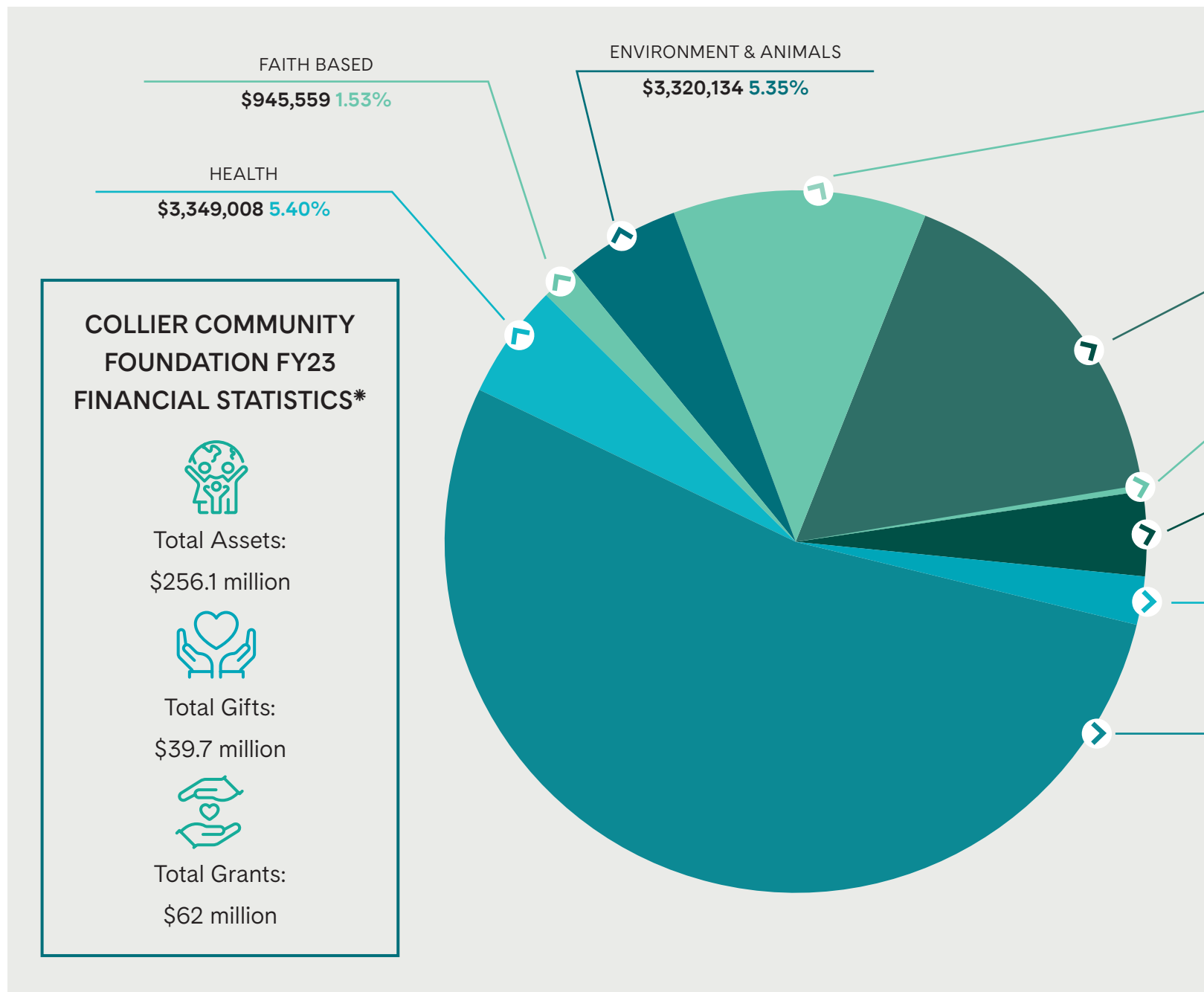
When approved, capital is invested in the form of flexible, cost-effective loans that are expected to be paid back, thus reinvesting the dollars to consistently fund new initiatives into the future.

5

Collier County thrives with new affordable, stable, and quality housing options.

** Please consult your tax advisor regarding tax-deductibility of contributions.*

The Collier Community Foundation granted **\$62 million** in its 2023 fiscal year by funding nonprofit programs, services, community initiatives, and scholarships.



THE IMPORTANCE OF TRANSPARENCY

The Collier Community Foundation adheres to the highest standards to operate in the public view and public interest. Our financials are updated quarterly and available for review upon request. You may also review the last five years of our Financial Statements, tax documents, including Internal Revenue Service Form 990 and Form 990-T (if applicable), our Articles of Incorporation and Amendments and our ByLaws at collierccf.org. You may also visit GuideStar at guidestar.org for more information about the Community Foundation.



HOUSING AFFORDABILITY

\$7,123,809 11.49%

HUMAN SERVICES

\$10,376,801 16.73%

OTHER

\$69,308 0.11%

PUBLIC, SOCIETAL BENEFIT

\$2,253,523 3.63%

ARTS, CULTURE, & HUMANITIES

\$1,495,229 2.41%

EDUCATION

\$33,086,000 53.35%**

* Unaudited totals

** The Education total includes an agency fund transfer of \$20.2 million

➤ TOTAL: \$62,019,371 100.00%



Naples Botanical Garden



Baker Senior Center Naples



Child's Path

CCF supports local nonprofits by granting to a broad spectrum of programs and services for children and young adults, seniors, veterans, the environment, and more.

AGENCY FUND LIST

Community Foundation Funds

Collier Forever Fund
Program & Operations Fund (CCF)
Arts Fund
Basic Needs Fund
Disaster Relief Fund
Education Fund
Environment Fund
Healthcare & Mental Health Fund

Agency Funds Held by the Community Foundation

Animals

Humane Society Naples
SNIP Collier, Inc.

Arts, Culture, & Humanities

Art League of Marco Island
Big Cypress Chapter NSDAR
Holocaust Museum & Cohen Education Center
Marco Island Historical Society
Music Foundation of Greater Naples
MusicScores Violin, Inc.
Naples Art Institute
Naples Concert Band, Inc.
Naples Historical Society, Inc.
Opera Naples, Inc.
The Naples Players
United Arts Collier

Education

Able Academy, Inc.
Bentley Village Foundation, Inc.
Books for Collier Kids, Inc.
Champions For Learning
Child's Path
Collier County Public Schools
Community School Foundation, Inc.
Culinary and Hospitality Education Foundation
of Southwest Florida
Friends of the Library of Collier County, Inc.
Fun Time Early Childhood Academy
Gargiulo Education Center, Inc.
Golisano Children's Museum of Naples
Grace Place for Children and Families, Inc.
Guadalupe Center, Inc.
Junior Achievement of SW Florida
Literacy Volunteers of Collier County
New Horizons of Southwest Florida, Inc.
Pathways Early Education Center of Immokalee, Inc.
RCMA
Saint Ann School Foundation, Inc.
The Immokalee Foundation

Environment

Conservancy of Southwest Florida
Everglades Society for Historic Preservation, Inc.
Friends of Rookery Bay
Naples Botanical Garden, Inc.
The Everglades Foundation

Health

Alzheimer's Support Network
Avow Hospice, Inc.
Cancer Alliance Network
David Lawrence Mental Health Center, Inc.
Florida Lions Eye Clinic
Foundation of Collier County Medical Society
Golisano Children's Hospital of SWFL
Hazelden Betty Ford Foundation
Help A Diabetic Child
Mental Health Association of Southwest Florida
NAMI Collier County
Parkinson Association of Southwest Florida, Inc.
Planned Parenthood of Southwest and Central Florida
Protected Harbor, Inc.

Human Services / Basic Needs

Baby Basics of Collier County
Baker Senior Center Naples, Inc.
Catholic Charities Diocese Of Venice, Inc.
Children's Advocacy Center of Collier County
Collier County Junior Deputies League, Inc.
Collier Senior Center – Golden Gate
Dr. Piper Center for Social Services, Inc.
Fostering Success
Girl Scouts of Gulfcoast Florida, Inc.
Girls on the Run of Southwest Florida, Inc.
Goodwill Industries of Southwest Florida, Inc.
Habitat for Humanity Collier County
Harry Chapin Food Bank of Southwest Florida, Inc.
Laces of Love Charitable Foundation, Inc.
Lighthouse of Collier, Inc.
Meals of Hope, Inc.
Our Daily Bread Food Pantry, Inc.

Pregnancy Resource Center of SWFL
Project HELP, Inc.
Shelter for Abused Women & Children
Special Olympics Florida – Collier County
STARability Foundation
St. Matthew's House
YMCA of Collier County

Philanthropy & Volunteerism

Collier County 100 Club
GFWC Naples Junior Woman's Club, Inc.
Marco Island Rotary Club Foundation, Inc.
Naples Children & Education Foundation (NCEF)
Naples Lions Club Foundation
Rotary Club of Naples Charitable Foundation, Inc.
Rural Neighborhoods, Inc.
The League Club, Inc.

Religion

Celebration Community Beach Church
East Naples United Methodist Church
Moorings Presbyterian Church
Naples Jewish Congregation, Inc.
Temple Shalom, Inc. of Naples, FL

Women & Girls

Women's Foundation of Collier County

Funds received by the Collier Community Foundation as of June 30, 2023.

For more information, please call **239.649.5000** or visit **collierccf.org**

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Our 2018-2019 cover featured the Naples Pier before it sustained Hurricane Ian damage on September 28, 2022.

The Collier Community Foundation's dedicated, experienced, and professional staff can help you make the most of your charitable giving through our community knowledge, grant oversight, and personalized service. Informed giving. Powerful results®.

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Informed giving. Powerful results.®

For the past 38 years, the Collier Community Foundation has been a catalyst for collaboration. We inspire ideas, ignite action, and mobilize resources to address our community's needs by:

- Funding innovative programs and organizations that improve the quality of life in Collier County and beyond
- Connecting people who care to causes that matter
- Growing charitable legacies for individuals, families, and businesses

We align the right players to make the biggest impact. From funding Future Ready Collier to responding in the aftermath of Hurricane Ian to developing the first workforce housing solution in Collier County—we play a unique, essential role that leads to real action.

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