

our community



GIVING MATTERS

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“We’re working with philanthropists to design different types of giving strategies ... always looking to the next chapter in philanthropy and giving.”

— Sarah Owen, CEO and president of the Southwest Florida Community Foundation



PHOTO BY BRIAN TIETZ

▲ The Southwest Florida Community Foundation has your back on all the causes you care about.

NO MATTER THE NEED, WE’VE GOT YOUR BACK

Has someone ever told you, “I’ve got your back?”

It’s a powerful statement of loyalty and support, knowing someone cares and is watching out for you. Think about a mother holding the arms of a toddler just taking his first step. It’s a beginning to bigger things.

If someone didn’t have our back, would we dare to try something new? Test an idea? Pursue our big dreams?

When someone has our back we become more courageous, more inspired and more inclined to step outside our comfort zone. We dare to face the unknown when we have support.

Support can also be a catalyst for change.

And it takes on many forms – financial, emotional, social and physical. The Southwest Florida Community Foundation’s mission is to cultivate regional change for the common good and on any given day, we’re involved in got-your-back moments made possible by donors, partners, neighbors, nonprofits and businesses.

For the longest time, the Community Foundation was primarily perceived as a granting and funding organization for nonprofit organizations and awarding scholarships to college-bound students. It’s all a very important part of what we do. Our donors’ generosity makes that possible. Last

SEE BACK, 4 ►



Sarah OWEN

President & CEO
Southwest Florida
Community Foundation

Building Trust to Create Change

“Go ahead fall back, we will catch you, Sarah!”

I remember these words from my earliest days of team building exercises and I imagine many of you have participated in something similar.

In order to build trust among a team, members are asked to stand with their back to their colleagues and perform a blindfolded free fall into their arms. You can’t see them back there but you have to trust that they will catch you.

You have to know they will have your back in both the exercise and the work that is to come for the team.

The theme of this year’s Southwest Florida Community Foundation’s Annual Report to the community is *We’ve Got Your Back, Southwest Florida* and I couldn’t help but think of that trust building exercise.

The Foundation wants to be a trusted resource and partner to our region and residents, someone you can count on when it comes to creating your vision for positive change, generosity and community involvement.

In this report, you will see the impact YOU have helped create through establishing funds to guide your giving, supporting others in times of disaster and joining us in community initiatives like workforce transformation and attainable housing.

You will also read about our record assets and strong investments, grants to empower nonprofits, and scholarships to assist students in completing college and certifications, as well as our community leadership work.

Go ahead, fall back. We’ve got you and we love working with you.

Here we go —OC

In Gratitude,

Sarah

Money at Work: Record Assets and Strong Investments

The Southwest Florida Community Foundation hit a major milestone during fiscal year 2017. We reached over \$112 million in total assets. We also had a strong return on investments of 12.8% for the one-year period ending June 30, 2017. Our total assets increased by 19.4% from the previous fiscal year while investments rose 12.2% percent from the previous fiscal year. The increases are a result of new funds, New Market Tax Credits, additional contributions and investment returns. Since its inception 41 years ago, your

Community Foundation has received \$120 million in contributions and distributed \$71 million in direct support to the community.

In addition to overseeing the Foundation's assets and investments, the Board of Trustees' Finance Committee also reviews quarterly results presented in our financial statements and annually recommends the budget to the Board of Trustees.

The Board of Trustees' Audit Committee oversees accounting and financial reporting policies and practices,

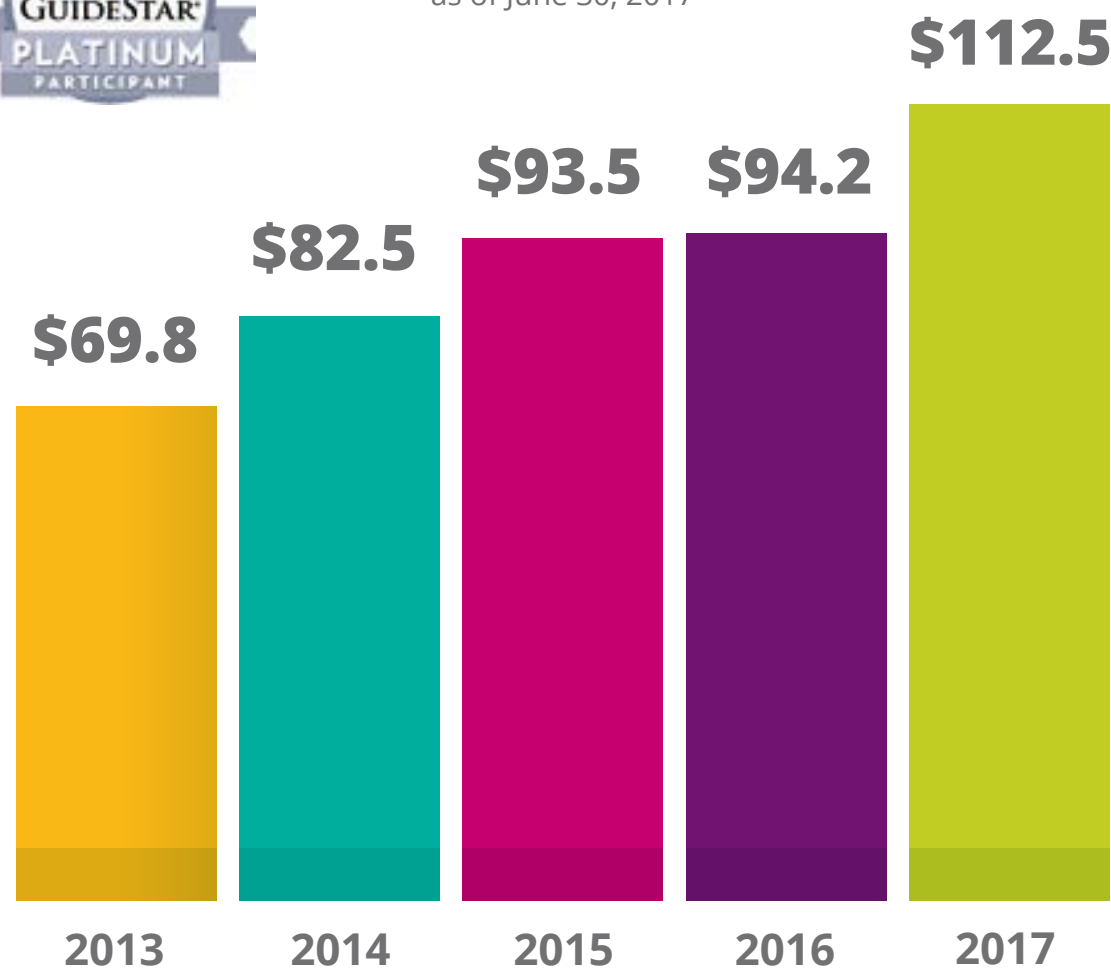
the Foundation's internal controls and the independent audit of financial statements. The Audit Committee is also responsible for reviewing IRS Form 990 prior to filing the foundation's tax return and reporting to the Board of Trustees.

The Community Foundation has earned the highest level of recognition offered by Guidestar, the world's largest source of nonprofit information, and is in compliance with National Standards for U.S. Community Foundations. —OC



TOTAL ASSETS

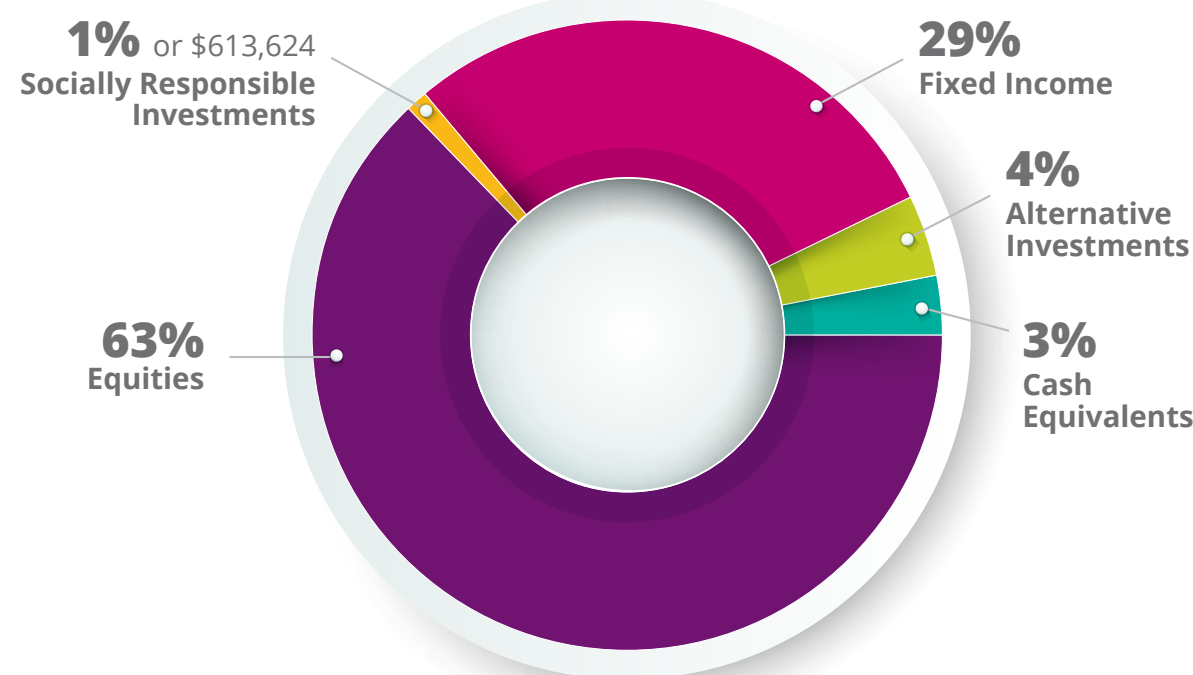
as of June 30, 2017



INVESTMENTS UNDER MANAGEMENT

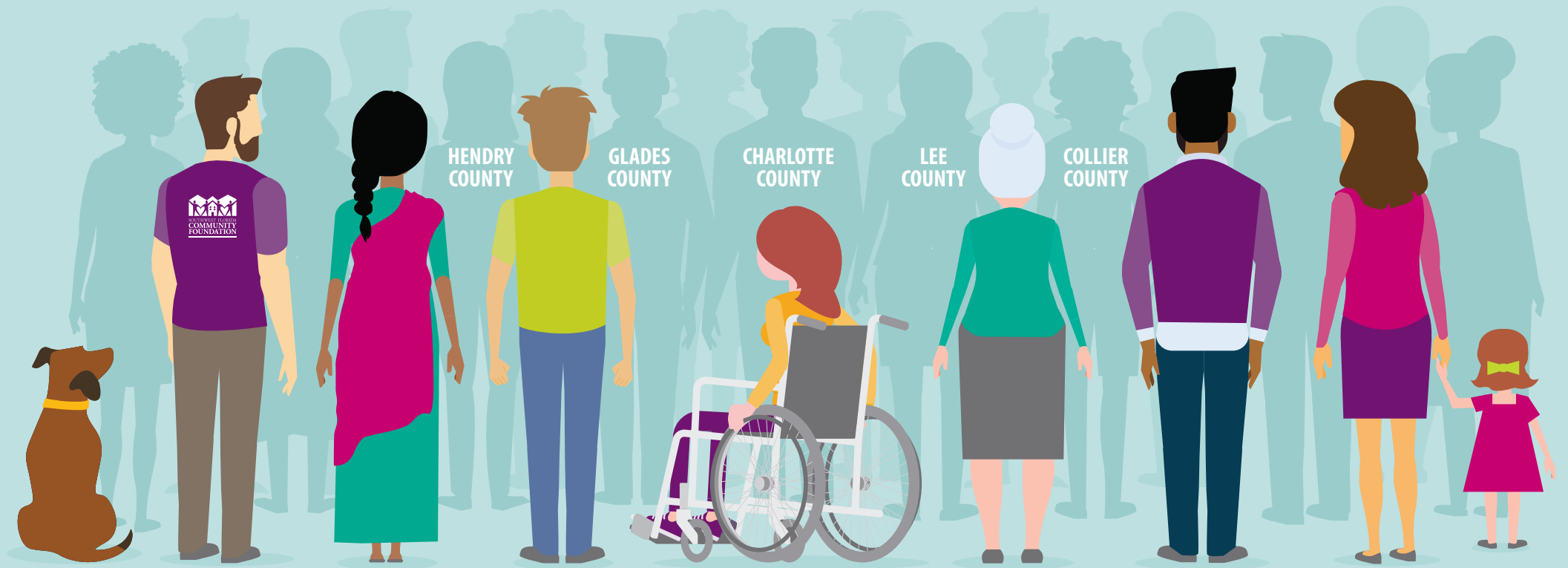
\$76,590,336

as of June 30, 2017



We've Got Your Back, SWFL

2017 ANNUAL REPORT



We've got your back on:

> All the CAUSES you care about

We have granted \$71 million in grants & scholarships since 1978 to support regional nonprofits addressing causes in our community. And, we also connected our donors to causes they care about.



> Scholarships

Provided more money to more students and increased multi-year grants so more students have money to complete a degree or certification.

- Awarded \$800,000 in scholarships to help 150 students achieve their dream.
- Increased number of scholarships by 22%.
- Increased number of multi-year scholarships by 18%, awarding 22.
- Increased our reach to students in the region increasing the number of applications by 55% for a total of 1800 applications.



> Giving & Investment Solutions

Surpassed \$100 million in assets providing more money for grants to nonprofits and funding for the Foundation's work.

- First endowed fund created by living donors for \$5 million to support the work of the Foundation in the new Collaboratory & Tech Hub to open in summer 2018.
- Our Socially Responsible Investment fund has grown by 5% to provide conscientious options for the Foundation fundholders.
- More people gave more money through the foundation last year with a total of \$6,641,501, a 30% increase over last year.

> Grantmaking to Nonprofits

Granted more money to nonprofits to help them create change in the region and partnered with nonprofit leaders to improve the health of their organizations in the areas of leadership, communications, board governance and finance.

- Nonprofit capacity (or organizational health) has improved steadily since 2014, based on our annual capacity survey.
- Received record number of ideas from regional nonprofits with plans to create change and improve the community.

Funded over \$4.3 million and a total of 745 of grants through:

- Donor Advised Funds
- Specialty Funds
 - Women's Legacy Fund of SWFL
 - LGBT Fund of SWFL
 - Bonita Springs Community Fund
 - Environment Fund of SWFL
- Field of Interest Funds
- Annual Nonprofit Agency Funds
- Donor Designated Agency Funds
- Designated Funds
- Field of Interest Funds
- Scholarship Funds

> Community Leadership

Invested in sustainable improvements to the community.

- \$10,000,000 New Market Tax Credit deal closed for the Collaboratory & Tech Hub and the Foundation's new home, a space where collaboration will be cultivated.
- Hertz Employee Relief Fund was established to provide grants made to corporate-wide employees for personal hardship and natural disasters.
- Responded to statewide and local disasters with funds for:
 - Pulse Nightclub
 - Together Fort Myers Fund – Club Blu shooting
 - Wildfire Relief Fund
 - Lee County/Bonita Springs Floods Fund
 - Hurricane Irma Relief Fund
- Started Land of Opportunity Fund focused on immigration legal services.
- Partnered on collective leadership projects for Affordable Housing and Children's Behavioral Health.
- Connected donors to help support the United Way 211 line for veterans.

Served as backbone organization for a collective impact initiative:

FutureMakers Coalition

- Exceeded the goal of # of students filling out the Free Application for Financial Student Aid (FAFSA).
- Increased # of nonprofits experimenting with new innovative programs, 29% more FutureMakers Coalition projects.
- Decreased # of Certified Nursing Assistant (CNA) openings in businesses in the region by 72% in persistent openings.
- More partners have stepped up to support the coalition with nearly \$250,000 in investments.

To view a list of our supporters, visit www.floridacommunity.com/annual-report or call 239-274-5900.

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The Board of Trustees of the Southwest Florida Community Foundation is made up of community leaders who are representative of the communities we serve. Trustees approve all grants made by the Community Foundation and ensure that the organization meets all laws and legal requirements.



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FROM PAGE 1

year we awarded \$4.3 million in grants and scholarships plus nearly another \$750,000 in programs and partner support, bringing our total investment in the region to \$5.4 million.

We've found an effective way of granting funds through a competitive process that develops interagency collaboration and provides data-driven accountability.

However, the Community Foundation's "back-watching" goes much deeper than grantor and funder.

"Over the past year, we've responded to immediate needs, establishing relief funds to help those impacted by Hurricane Irma, the Club Blu shooting and the flooding in Bonita Springs," said Sarah Owen, president and CEO. "We've helped some of the largest employers in the region define their corporate philanthropy and as a backbone organizer we continue to bring together diverse groups around the FutureMakers Coalition's goal of transforming Southwest Florida's workforce."

We have the willingness, resources, expertise and partnerships to drive change by convening and facilitating important conversations in the region, including access to affordable housing, workforce development and behavioral health care for children.

A Bold New Future

The next chapter is already taking shape in the historic neighborhood of downtown Fort Myers with the renovation of the Atlantic Coast Line Railroad depot and the creation of a Regional Collaboratory & Tech Hub where ideas for social, economic and sustainable change will be born and fostered.

"The Collaboratory is a game-changer," Mrs. Owen said. "What will be happening inside that building will lead to ideas, people and funding coming together to make social and economic change for our region."

The renovated train station and a 15,000-square-foot addition designed and built to earn LEED Gold certification will be home to the foundation's new regional offices and the Collaboratory, offering meeting and tenant spaces, social gathering and special events venues, and shared working and collaborations space all powered by state-of-the-art Florida Lambda-Rail broadband internet.

The project was funded through a \$10 million New Market Tax Credit deal which encourages economic development in distressed neighborhoods. Mrs. Owen hopes the Community Foundation's use of New Market Tax Credits, will encourage nonprofits to take advantage of the financial tool.

The Foundation has also signed a long-term lease with the city of Fort Myers for the Jackson Street depot. This is a true public-private partnership in which the city is not funding the entire infrastructure. It's a perfect example of impact investing by getting everyone at the table.

Long-time community benefactors David and Linda Lucas successfully challenged the community to match their generous \$2.5 million Collaboratory endowment, resulting in \$5 million, not for infrastructure, furniture or office supplies, but for the transformational collaboration, community convening and philanthropic work that will take place on the 3-acre campus.

"We believe people coming together is one of the most powerful ways to strengthen our region," said Dr. Larry Hobbs, chairman of the Southwest Florida Community Foundation board of trustees, in announcing the endowment and matching gifts from 83 individuals.

"Collaboration works best when it evolves organically

through conversation and working together. When people find themselves together there's an energy that just happens," said Mrs. Owen. "What happens in the Collaboratory depends on you, the community. And we have great expectations."

Beyond Granting and Funding

During the past year, the Southwest Florida Community Foundation responded to immediate needs in the community, state and nation by increasing our number of emergency relief funds following Hurricanes Irma, Harvey, Maria and flooding in Bonita Springs. Our donors helped establish the funds which were also supported by caring citizens and businesses throughout the country. We were the portal for this global community that wanted to help.

One hundred percent of the donations supported agencies working on the frontlines to assist the victims and to restore a degree of normalcy to individuals and families.

By connecting our donors to community needs, we have helped many nonprofit programs such as the United Way's expansion of its 211 hotline to veterans programs and services to overcome challenges.

The Community Foundation also worked with Hertz to provide disaster relief for its employees impacted by flooding in Louisiana and Hurricanes Harvey, Irma and Maria.

We responded to the heartbreaking Pulse Nightclub shooting in Orlando and created a relief fund for another that hit too close to home — the Club Blu shooting in Fort Myers.

WINK TV sports reporter Bill Halter, who knew one of the victims, Lehigh Senior High basketball player Stefan Strawder, felt he had to act after the random shooting which also killed Sean Archilles, 14.

"I had to do something about it," he said. Mr. Halter promoted the Foundation's Together Fort Myers Fund, urging the community to donate and conducted fundraising at local bars.

Supporting New Ideas, Challenges

During the last year, the Community Foundation helped philanthropists start 43 new funds, many identifying emerging challenges and earmarked for specific causes.

The Land of Opportunity Fund provided support for immigration legal services and the El Camino webpage helping to foster a path toward legal permanent residency for immigrants and a five-county collaboration of supporting nonprofit representation. We helped Foundation fund holder Bob Martin establish Bridge to a Cure upon learning his granddaughter was diagnosed with terminal brain cancer. By letting us handle the administrative tasks, serving as the nonprofit for his fundraising and granting, Mr. Martin can focus on his mission of providing children with life-sustaining treatments until a cure is found.

"What the community foundation has done in terms of effort and support has been outstanding," he said. "The convenience and benefit appear endless."

Support Jobs, Educational Initiatives

As the backbone organization for the FutureMakers Coalition, the Community Foundation has the region's back in developing a qualified workforce for well-paying jobs now and in the future. This past year, more partner organizations joined the conversation and one of the coalition's efforts to fill long-vacant positions for certified nursing assistants have been highly successful and is a replicable program for other in-demand jobs.

One of our grants — \$45,000 to pay the salary of an instructor at the Clewiston Industrial Mechanics model — has resulted in a 100-percent success rate for the inaugural class of nine.

"I'm really pleased with the results," said Mike Swindle, director of workforce development who fully expects the program to be funded by the Florida Depart-

ment of Education based on the success and reportable data.

"The mechanics program is a great example of educators talking to local businesses and identifying a need," Mrs. Owen said. "Mike discovered there were a lot of job openings for farm and industrial mechanics and developed a solution that is helping to address Hendry's high unemployment and poverty levels."

Residents of the Gulf Harbor community in Fort Myers and its yacht club have long supported AMKids Southwest Florida, a program designed to break the cycle of failure and poverty for high-risk kids often in trouble at school or with the law. Annual dinners and auction events raise money for scholarships, a donor-advised fund and endowment overseen by the Community Foundation.

"The Foundation gives us somewhere to put our money with someone to manage it," said long-time AMI supporter Craig Anderson. "We don't have to form a nonprofit and they oversee the fiduciary responsibilities."

The Community Foundation also assisted the Shadow Wood Country Club Foundation establish a multi-year scholarship program for employees and their children of the Bonita Springs club.

"We support eight charities and have talked about offering a scholarship program for a while," said resident Chet Hobert. "The Community Foundation was wonderful in helping us get it off the ground. We kicked off the scholarship program last year with the Foundation's great assistance."

By working with us, the scholarships were a tax deduction for the Shadow Wood foundation but not considered a taxable gift for recipients.

Leadership for Philanthropists

Fort Myers-based Chico's FAS enlisted the Community Foundation in spring 2017 for advice in relaunching its national and regional corporate giving strategy.

"We wanted a strategic approach that aligned with our customers and the company's goals," said Jessica Wells, principal, corporate giving. "Sarah and her team helped guide us through the process of how we think about local giving and ensure we are supporting the organizations and events that tie into our philanthropic mission as a company."

"It was a philosophical conversation, as well," said Ms. Wells. "They offered us an outside perspective of why companies need to have a sense of purpose and community and gave us the tools to look at executive involvement by aligning executives' passions with local organizations. It was a holistic approach to corporate giving and philanthropy."

Our Many Meaningful Purposes

Having Southwest Florida's back requires some multitasking. At times the Community Foundation is the traditional grantor and funder. Other times we're bringing together people for meaningful, status quo-changing conversations.

As stewards of the social, economic and environmental fabric of the region, we're dedicated to finding out what it's going to take to make meaningful change — and to keep going until we get there.

"I like to think of it this way: We can't be one single thing because one single thing has never been able to solve a problem," said Mrs. Owen. "We can't do it by ourselves but we can through collaboration." —OC



SWINDLE



WELLS



HOBBS