

\$497,470 in Scholarships Awarded to Area Students

Almost a half million dollars will be awarded this year to local scholarship recipients directly through the Community Foundations and through matching funds from the Florida Pre-paid program.

Nearly 1,000 applications were received this year. Scholarships range in size from \$500 to full tuition scholarships to a Florida college or university and are awarded based on parameters set by each donor.

"So many people help us make this program possible -- our gracious donors, scholarship readers, trustees of the scholarship committee, and staff," said Susan Fersner, chairman of the Scholarship Committee. "The effort is tremendous but so beneficial to the community. We all are encouraged when we hear of the successes of our scholarship recipients."

The Community Foundations scholarship process begins with staff processing and verifying each application. Then business and community leaders, serving as "readers," evaluate each application. The Scholarship Committee

(made up of nine trustees) makes recommendations which are reviewed and approved by the Community Foundations full Board of Trustees.

Scholarship recipients were honored by the Community Foundation during an awards reception June 9 at the Broadway Palm Dinner Theatre.

Danielle Dennis, a 1994 recipient of the Isabel Mayer Kirkpatrick Scholarship, was the guest speaker for the evening.

Dr. Dennis is currently a professor of Literacy Education at the University of South Florida in Tampa with a focus on struggling adolescent readers.

She has worked extensively with at-risk students and had the opportunity to work with teachers in Kenya as part of a UNESCO project to provide teacher training in developing countries.

A list of scholarship recipients can be found on page 6.



As a way of saying thank you, the Community Foundation recently held a reception for its leadership members. At the reception, left to right: Rich Butler, Shirley Gerstenberger and Robert Shrader.

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Carol McLaughlin Retires After Eight Years; New Program Director Arrives



Carol McLaughlin

Carol McLaughlin, Chief Program Officer, will retire as of June 30.

Since 2000, Carol has been responsible for developing and administering the many grants and scholarship programs at the Community Foundation. She is a strong advocate for the nonprofit community and has worked with foundation donors in matching their passions with community needs.

Carol has seen the assets of the Community Foundation more than double since she has been here and she was instrumental in the Foundation's awarding more than \$27.5 million in grants and scholarships during her tenure.

"Carol came at a pivotal point in the growth of the Community Foundation and led the creation and development of the programs in place at the foundation today," said Julia East, President and CEO.

Carol's passion for helping nonprofit organizations in Southwest Florida as well as her commitment to the scholarship program is well known in the community and will be remembered for many years to come.

Carol will be spending time with her family and traveling. In August, Carol will return part-time as a consultant working with Anne Douglas to create a smooth transition through the end of the year.

In honor of Carol's commitment to the Community Foundation and our community, the trustees of the Foundation have established a scholarship fund in her name.

We wish Carol the best on her new journey of retirement.

Welcome, Anne Douglas



Anne Douglas

Anne Douglas has been named Director of Programs, to succeed Carol McLaughlin.

Anne recently moved from Virginia where she was the Program Officer for The Cameron Foundation, a health legacy foundation. Like community foundations, The Cameron Foundation provides grants in many areas of funding such as healthcare, human services, education, conservation and historic preservation.

During her tenure with the Cameron Foundation, she has developed a capacity self-assessment tool for nonprofits, established the Foundation's grantmaking strategies, and partnered with a community foundation and other funders to create the Southside Virginia Nonprofit Resource Center, a Cooperating Collection of the Foundation Center (like the one we have). She has previous work experience in coordination, development, public relations, and grant writing with a variety of nonprofits.

She grew up in Texas, has a son and daughter (both grade school age), likes to garden, and is very excited about relocating to Southwest Florida. Anne's parents will be relocating to this area as well—a return home for her mother who grew up in Arcadia!

Giving... From A Woman's Perspective



The [Women's Legacy Fund](#) awarded \$15,000 to four agencies with programs in literacy as their first grant cycle. A luncheon was held May 17 at the Miromar Lakes Beach and Golf Club to celebrate this achievement.

The group of more than 50 women formed last fall and, in addition to raising the dollars for their first grant cycle, has established an endowed field-of-interest fund to be used for future needs of the community.

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Martin Packard
Robbie Roepstorff
John Schubert
Daniel Valentine
Robert Wigley

www.sanibelcommunity.com

The Good Neighbor Community Foundation of Sanibel-Captiva is a division of the Southwest Florida Community Foundation.

Good Neighbor Community Foundation of Sanibel-Captiva Announces 2008 Grants

The Good Neighbor Community Foundation of Sanibel-Captiva has awarded a total of \$53,500 to area nonprofit organizations that support the islands through their programs in its 2008 grant cycle.

Grants ranging from \$2,500 to \$10,000 were awarded to BIG Arts, Brightest Horizons, Children's Education Center of the Islands, City of Sanibel/After-school program, FISH of Sanibel, Inc., Gulfshore Ballet, Inc., Junior Achievement of SWFL, Inc., Sanibel Historical Museum & Village, Inc., Sanibel Music Festival, Sanibel School PTA, Sanibel Sea School, Schoolhouse Theater Foundation, and SWFL Symphony Orchestra.

The Community Foundation recently established a Good Neighbor Community Fund which will allow the foundation to set aside a portion of gifts in an endowed fund to meet future needs of the islands as well as meet current needs through grants to nonprofit organizations.



Sanibel Sea School

New Endowed Funds of the Community Foundations

Fund for Southwest Florida

Southwest Florida Community Foundation • Unrestricted fund
Flexible endowed fund established to help meet the future unforeseen needs of Southwest Florida

All the Children of Christ Fund

Southwest Florida Community Foundation • Donor-advised fund

Nonprofit Training and Development

Southwest Florida Community Foundation • Field-of-Interest fund
Assist Lee, Charlotte, Collier, Hendry and Glades county nonprofit organizations in leadership development, grantwriting skills, financial management, and other pertinent employment seminars and training as recommended by the staff of the SWFL Community Foundation

Good Neighbor Community Fund

Good Neighbor Community Foundation of Sanibel-Captiva • Unrestricted fund
Flexible endowed fund established to help meet the future unforeseen needs of Sanibel and Captiva islands

Judge Isaac Anderson, Jr. Scholarship Fund

Southwest Florida Community Foundation • Scholarship fund
A scholarship to a 2- or 4-year regionally accredited college or university for a Lee County high school senior, who can demonstrate financial need, have a GPA of 3.0 or higher, and can demonstrate strong ties to the community through community service, extracurricular activities, or religious endeavors

Bonita Springs Celebrates Love of Bonita Award at Annual Meeting Luncheon

This year, the Bonita Springs Community Foundation combined their annual meeting and the Love of Bonita Award presentation at a luncheon held April 7 at the Bonita Bay Club.

David and Sarah Zimmermann were honored as this year's Love of Bonita award recipients. This is the first year a couple has been named for the honor.

Approximately 100 people attended. The Zimmermann's parents and children were on hand to help honor the couple who was chosen for their tireless commitment and contribution to the community through special events, volunteering their time and donations from their business "The Royal Scoop."

Past Love of Bonita recipients were David Short, the late Pat Lord, Ira Hawk, Dick Miller, Jacke McCurdy, and Donna Roberts.



Past and Present Love of Bonita Recipients at the 2008 Annual Meeting and Love of Bonita Luncheon (from left to right): David Short, Jacke McCurdy, Donna Roberts, Sarah and David Zimmermann, Dick Miller, and Ira Hawk.

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Brian Lucas
Frances Luessenhop
Arden McCurdy
Dick Miller
Nancy A. Near
Harlan C. Parrish
Darren Robertshaw
David Shellenbarger
John Warfield
Joel Whittenhall

www.bonitacommfoundation.com

The Bonita Springs Community Foundation is a division of the Southwest Florida Community Foundation.

New Endowed Funds (continued)

Community Fund for Greater Bonita Springs

Bonita Springs Community Foundation
Unrestricted fund

Flexible endowed fund established to help meet the future unforeseen needs of greater Bonita Springs

Women's Legacy Fund

Southwest Florida Community Foundation • Field-of-Interest fund

This endowed fund was established by the members of the Women's Legacy Fund to meet future community needs

Houkom Family Unrestricted Fund

Southwest Florida Community Foundation • Unrestricted Fund

Flexible endowed fund established to

help meet the future unforeseen needs of Southwest Florida

Greater Bonita Springs Children's Fund

Bonita Springs Community Foundation
Donor-advised fund

Certified Public Accountants Scholarship Fund

Southwest Florida Community Foundation • Scholarship Fund

To provide for tuition, books, and/or fees to an undergraduate or graduate student, with a 3.0 GPA, who demonstrates financial need. Recipient must major in accounting and plan to attend a post-secondary institution in Lee, Charlotte, Hendry, Glades or Collier county.

THE FOUNDATION

Scholarship Awards continued

Scholarship Recipients

Kathryn Acord
Kristina Abbate
Jose Arrojo
Maria Baltazar
Stacy Banbury
Brooklyne Berry

Andres Boral
Kristen Briggs
Malinda Brown
Chayla Burnside
Alexandra Burr
Raheen Bush
Chanelle Campbell
Caitlin Carroll
Ariel Chomey
Megan Clouse
Jacqueline Contreras
Kelly Delaney
Mayra DeLosReyes
Lucas Egan
Raul Fernandez
Kimberly Fielder
Jeriel Flemmings

Jewwna Fredeen
Felisha Garcia

Matthew Garcia
Michael Gibson
Renee Greco
Jasmine Green
Kelsey Green

David Gruninger
Daniel Hakes
Courtney Halpin
Christopher Howland
Rebecca Illicete
Tara Jacobsen
Alex Jarstad
Melchisedek Jean
Christine Johns
Mukuka Kangwa
Derrick Kearse
Andrew King
Rev. Eddie Lake
Tiffany Long

Miguel Lopez-Reyes
Amy Losier
Aaron Lozano
Sara Lui
Elizabeth Maik

Scholarship Fund

John & Mary Shanley
James Bilder
Carl E. Brooks
Judge William Nelson
Jordan Abdo/Michael Bluett
Robert Kleckner; Robert & Dorothy Pence; Chet & Jannett Perry
Chip Johnson Memorial
Sam Sirianni
SWFL PGA
Felix & Edna Swain
SWFL PGA
Felix & Edna Swain
Felix & Edna Swain
James Bilder
Chip Johnson Memorial
James Bilder
James Bilder; George Judd
John & Mary Shanley
Love of Bonita
Matt Harmon Memorial
Isabel Mayer Kirkpatrick
Doc Keen Memorial
Dunbar Heritage; Doris W. Frey Memorial
SWFL PGA
Judge Isaac Anderson Jr. Memorial; SWFL Deputy Sheriff's
James Bilder
Sam Sirianni
SWFL PGA
Felix & Edna Swain
Lewis B. Barber Memorial; SWFL Deputy Sheriff's
SWFL PGA
Isabel Mayer Kirkpatrick
Paul & Aline Flynn
Paul & Aline Flynn
Isabel Mayer Kirkpatrick
Paul & Aline Flynn
Chip Johnson Memorial
Isabel Mayer Kirkpatrick
John & Mary Shanley
Sam Sirianni
Felix & Edna Swain
Sam Sirianni
Felix & Edna Swain
D & A Florida; Robert & Dorothy Pence
Sam Sirianni
Chip Johnson Memorial
Doris W. Frey Memorial
Francis Harris Gresham
AAUW Mary Gottcent; John & John & Madeleine Taeni

Scholarship Recipients

Angela Martinez
Andrea McCrary
Miles McEndree
Kelsey McGregor
Mary Meador

Andy Middleton

Brett Miller
David Montalvo
William Moore, III
Withline Olibrice
Kai Oliveira
Stephanie Paraless
Ryan Patrone
Erica Patti
Ashley Paulk
Abby Peacock
Thomas Pell
Sheina Perez
Gina Petracco
Laurie Pistorio
Cindy Pohner
Cassandra Quinones
Debbie Radcliff

Emily Roberts
Ama Rodriguez
Melissa Rodriguez

Shae Ryan
Michael Sangelo

Mary Sansone
Demica Santiago
Blake Shelton
Marilyn Smallwood
Ryan Smith
Maritri Soto Garcia
Shannan Souza
Kathryn Stanchi
Sal Stanzione
Brandy Strouse
Christine Theogene
Kristen Turner
Ashley Turrubiardez
Elliott Van Mitchell
Yajaida Vasquez

Nicholas Vaughn
Lee Visone

Hailey Whewell
Courtney Whittamore
Ashley Williams
Kirk Williams

Scholarship Fund

Drs. Ira & Udaya Dash
Paul & Aline Flynn
SWFL PGA
SWFL PGA
AAUW Mary Gottcent; Chip Johnson Memorial
James Bilder; John & Ruth Childe; Robert & Margaret Schikora
SWFL PGA
Isabel Mayer Kirkpatrick
SWFL PGA
Carl E. Brooks
Sam Sirianni
George Judd
SWFL PGA
George Judd; David G. Robinson
Felix & Edna Swain
Doc Keen Memorial
Couse-Gram
James Bilder
Sam Sirianni
John & Madeleine Taeni
Anne Sturrock Nursing
James Bilder
Chip Johnson Memorial; John & John & Madeleine Taeni
SWFL PGA
George Judd
Chip Johnson Memorial; John & John & Madeleine Taeni
Paul & Aline Flynn
Judge Isaac Anderson Jr., Memorial
George Judd; David G. Robinson
Ruth Messmer Memorial
George Judd
Felix & Edna Swain
SWFL Deputy Sheriff's
Carl E. Brooks
John & Madeleine Taeni
Doris W. Frey Memorial
Chip Johnson Memorial
Faye Lynn Roberts
John & Madeleine Taeni
James Bilder
College Assistance
George Judd
Doris W. Frey Memorial; John & John & Madeleine Taeni
James Bilder
John & Ruth Childe; John & Mary Shanley
SWFL PGA
George Judd
Sam Sirianni
George Judd

TAX-WISE GIVING

WILL THE REAL IRA CHARITABLE ROLLOVER ACT PLEASE STAND UP AGAIN?

by John W. Sheppard

In August of 2006, Congress, in an unusual move, passed a sensible law entitled the Pensions Protection Act of 2006, which enabled those persons who owned IRA's and were over 72 years of age, to make direct gifts from their IRA's to Charitable Agencies, without first withdrawing the funds, reporting the withdrawal as ordinary income for income tax purposes, and then making the gift. Because it was good for charitable giving since it enabled persons qualifying with IRA's to make charitable gifts without tax penalties in several areas of the tax law, it was a very popular gifting device for the remainder of 2006 and 2007, when the law expired.

Since we have written about this law before, we don't want to continue to "beat a dead horse." However, there has been considerable sentiment in Congress to not only revive the dead Bill, but to even expand it considerably because it was, during its short existence a great boon to Charitable giving, and consequently a substantial boost to many worthy charitable causes.

Essentially what the 2006 law did was simply remove the tax negatives of making gifts from one's IRA, which now requires that you must report the withdrawal as income, often placing the taxpayer in a higher tax bracket, and also increasing the amount of the Social Security payments that are subject to tax (which the taxpayer has paid for in his/her working years.)

In early 2008, there were new Bills introduced which would have not only extended the law indefinitely, but would remove the \$100,000 annual limitation, and even permit gifts to be made directly to income type vehicles (such as charitable gift annuities) directly from IRA's, without penalty. Wonderful idea! Things seemed promising for a few months. But then Congress, through its House and Senate governing committees, has by tying it to other measures in recent weeks, nearly killed the broadening of the law and raised questions as to whether even a simple extension of the expired law will get through this partisan Congressional session.

Here is where we stand as of May 22, 2008. On May 21, 2008, the House passed HR 6049 known as the Energy and Tax Extender Act of 2008, which among other things would extend the 2006 IRA Charitable Rollover Act, ONLY through 2008. The Senate is still considering a similar Act (S. 2886) which would extend the 2006 Act for two years. Neither of these Bills in their present form would provide for the expansions proposed earlier in the year, of removing the \$100,000 gift limitation, and making the extension permanent.

If you are interested in this concept so skillfully conceived in 2006 please consider encouraging your Senators to support S. 2886, and your Congressman to support H.R. 6049. We will update you as information may come forth from our Congressional representatives.



John W. Sheppard, a long-time member of the board of trustees of the Southwest Florida Community Foundation, is a retired estate planning attorney and author of several books on the subject of estate planning and planned giving. He can be reached through the Foundation office.

FOCUS is published by the Southwest Florida Community Foundation and its divisions, the Bonita Springs Community Foundation and the Good Neighbor Community Foundation of Sanibel-Captiva.

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The mission of the Southwest Florida Community Foundation is to connect donors and their philanthropic aspirations with evolving community needs.

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The leading resource in Southwest Florida for compassionate and flexible charitable giving



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Save the Date

**Major Annual Grant Cycle
Deadline**
June 19, 2008

**Professional Advisors Golf
Tournament**
September, 2008

Women's Legacy Fund Luncheon
October, 2008

National Philanthropy Day
November 14, 2008

Annual Meeting
November 20, 2008

Many events require an RSVP. Please check with the Foundation office if you have a question.

Reduce, Reuse, Recycle...

In an effort to help the Community Foundation conserve our resources, we ask that e-mail us at info@floridacommunity.com when you change your mailing address or if you would prefer to receive mailings via e-mail. We also ask that you think about who else might benefit from the information in this newsletter and pass it on when you have finished reading it.

If you have any questions, ideas or concerns, please contact us at 239-274-5900.