

\$611,480 In Grants To Southwest Florida Nonprofits



Good Wheels, a nonprofit that provides transportation services to area residents with disabilities, received a \$15,000 grant toward replacement of old vehicles.

Forty-five grants were distributed by the Southwest Florida Community Foundation during the 2007 Major Annual Grant Cycle totaling \$611,480.

Seventy-four applications requesting more than \$1.5 million were submitted by nonprofit organizations serving Lee, Charlotte, Hendry and Glades counties.

"There are so many worthy efforts. We must decide which grants we feel will best support the broad base of our community while honoring our donors' wishes," said Chief Program Officer Carol McLaughlin.

"The Foundation's board and the distribution committee work very hard to make sure that the grants awarded are going to make a difference in our community."

Grants were awarded for animal welfare, community development, education, the environment, health services, historical preservation, and human services.

Full list of grants on page 6

Foundation Complies with National Standards

The Southwest Florida Community Foundation has obtained National Standards Compliance status through the Council on Foundations.

This rigorous process took approximately one year to complete and many hours of dedication and hard work by Trustees and staff members to compile the necessary data to meet the requirements.

National Standards compliance acknowledges the Community Foundation has met the most exacting standards in philanthropy; the foundation's grantmaking includes an open, competitive process designed to address this community's changing needs; and that the foundation has a history of honoring donors' wishes.

National Standards were developed in 2000 by a group of community foundation practitioners to serve as a roadmap for legal, ethical, and effective practices within a philanthropic environment increasingly affected by technology, competition for donors, and political and media scrutiny.

Approved and adopted by the Leadership Team of the Council on Foundations, the National Standards for U.S. Community Foundations are philanthropy's most rigorous.

The Standards cover six areas of operational excellence: mission, structure and governance; resource development; stewardship and accountability; grantmaking and community leadership; donor relations; and communications.

Every 5 years, the Community Foundation must reconfirm its compliance with the National Standards for U.S. Community Foundations.

For more information regarding the National Standards for U.S. Community Foundations, visit the Council on Foundations website at www.cof.org. To learn more specifically how the Community Foundation meets these standards, please contact Julia East at the Foundation Office.

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A Message from the President & CEO



Hello! As you know, after 10 years of service Paul Flynn retired on June 1, and I became the new President and CEO. I have been with the Foundation for almost 3 years, first as Chief Development Officer and then as Vice President. For those of you who have not had an opportunity to get to know me yet, I thought I would share a little about myself.

I was born and raised in the Shenandoah Valley of Virginia, just outside of Staunton. Believe it or not, my mailing address was Churchville! I grew up in the same house as my father and grandfather on a "farm" that has been in the family forever.

In my early twenties, I moved to Northwestern Pennsylvania. For the first time in my life, I realized how much other people

were suffering. I became a board member of an organization called Community Services of Venango County, and this started me on a lifelong journey of community service. During my 20 years there, I was very involved in establishing a nonprofit network of services and working with community and economic development initiatives.

After being on the edge of the snow belt of Lake Erie for about 20 years, I decided it was time to move south. Geoff and I chose the Fort Myers area because we loved the small town feel with big town amenities and relocated here without jobs. We enjoy the sun and water, as do Alexandra and our yellow lab Miss Teak. I am an avid reader, enjoy live music in intimate settings, and treasure my time with friends and family. In my spare time, I develop curriculum and teach at the master and doctoral levels.

I have a strong belief in community, capacity building, giving a hand up, and cooperative ventures. I think we have a responsibility to leave the world a better place than it was when we arrived. I believe that two minds are always better than one and in the importance of working together.

It is with this in mind that I start this first year as CEO by working hand-in-hand with the Board of Trustees to create a strong strategic plan in order to continue and to build on the powerful and dynamic foundation already in place.

I think that I am truly blessed to have found my way to this part of Florida and to have this incredible opportunity to serve the community I treasure. I begin this new role with great anticipation and excitement, and trust that together we will build an even stronger Southwest Florida.

Julia East

Planned Giving Officer Announced



Arlene Knox has been named Planned Giving Officer for the SW Florida Community Foundation.

Arlene is a member of the senior management team and reports directly to the CEO. She is responsible for all aspects of the Community Foundation's planned giving program.

In August 2005, Arlene received her Masters Degree in Nonprofit Organizations from the University of Georgia and has worked for nonprofit organizations since 1997. She serves as a board member for Planned

Giving Council and the Gulfcoast Society of Fundraising Executives.

Arlene, a native of Georgia, has lived in Fort Myers for nearly two years and was most recently Director of Financial Development for the American Red Cross of Lee County.

Arlene may be contacted at 239-274-5900 or by email at aknox@floridacommunity.com.

\$590,591 in Scholarships Awarded to Area Students

The Community Foundations have awarded 180 scholarships totaling \$590,591 to area middle school, high school and college students.

Scholarship recipients were recently honored by the Foundation during an awards reception at the Broadway Palm Dinner Theatre. Guest speaker was Robbie Roepstorff, president of Edison National Bank and Bank of the Islands.

More than 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.

"It takes a tremendous group effort to award this many scholarships," said Susan Fersner, chairman of the Scholarship Committee. "But we all see the importance and value of this program and are encouraged when we hear

the success stories of past scholarship recipients."

The Foundations scholarship process begins with staff verifying that all applications are complete. Then approximately 30 "readers" (business and community leaders) evaluate each application. A Scholarship Committee made up of nine Foundation Trustees then makes recommendations which are reviewed and approved by the Foundation's full Board of Trustees.

This Year's Scholarship Recipients (listed by scholarship fund):

Jordan Abdo/Michael Bluett
Jenna Lunger

AAUW Mary Gottcent
Nicole Dillon
Cindy Pohner

Lewis B. Barber Memorial
Heather Caseres

James Bilder
Lina Bedoya
Alison Buckley
Wheatly Dorsainvil
Yesenia Hernandez
Dewayna Johnson
Marie Kennedy
Yesenia Lastra
Kari Myers
Lina Rodriguez
Kelsey Timberlake

Carl E. Brooks
Marlin Delvina
Christopher Perez
Yoldine Valery

John & Ruth Childe
Patrick Callis
Joel LaDolce

College Assistance
Patrice James
Elizabeth Boyd

Couse-Gram
Tanner Huysman

D&A Florida
Marlin Delvina

Dunbar Heritage
Ashley Tyre

Charles & Margaret Foster
Eric Hopkins

Fort Myers Beach Kiwanis
Kelly Bonkowski
Zachary Brindise
Samantha Francisco
Lydia Frantz
Angela Garavuso
Lauren Mayher
Sarah Mayher
Alexandra Peterson
William Simmons III
Anna Steiger
Ariel Upton
Nola Warrick

Doris W. Frey Memorial

Alison Buckley
Brittney Bagiardi
Christin Boggs
Bryce Hotchkiss
Hannah Paladini
Kelly Parham
Brittney Steeb
Yajaida Vasquez

William L. Graddy Law
John Miller III

Francis Harris Gresham
Carolyn Cough

Matt Harmon Memorial
Daniel Rossi

Chip Johnson Memorial
Janice Aquine-Augustin
Donetta Beck
Susanne Fischer

Larouna Maybin
Victoria Pereira
Debbie Radcliff
Saima Sabir

Chip Johnson Memorial
Ken Schwable

George E. Judd
Maria Cabrera
Niamh Charles
Maria Cortes
Brittany Dahlberg
Eric Hopkins
Kelly Kim
Jenna Lunger
Richard Martinez
Luisa Ocampo
Shae Ryan
Megan Sanford

Doc Keen Memorial
Jamar Boykin
Megan Randolph
Barrett Ringstaff
Marcus Rives

Isabel Mayer Kirkpatrick
Alison Buckley
Christopher Carmona
Liset Fleitas
Marie Kennedy
Luisa Ocampo

Robert A. Kleckner
Walter Idlette
Thamara LeBlanc

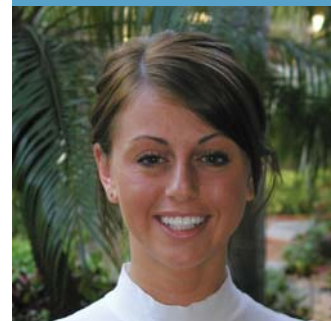
Love of Bonita Empowerment
Jordan Blosser



Daniel Castillo



Jonathan Grossman



Dana Perrone



Peter Ryba



Donya-Faye Wix

continued on page 6

AFFILIATE LEADERSHIP:

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Al Hanser,
Vice Chairman

Ann E. Arnoff,
Secretary

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Treasurer

J. Thomas Uhler,
Immediate Past Chairman

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Brenda Harrity
Antonio R. Lapi
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Martin Packard
Robbie Roepstorff
John Schubert
Daniel Valentine
Robert Wigley

www.sanibelcommunity.com

New Officers Named to Sanibel-Captiva Board

The Community Foundation of Sanibel-Captiva has announced its new officers as of July 1, 2007. Liddy Johnson has been elected to succeed Tom Uhler as Chair. Al Hanser has been named Vice Chair and Mike Kelly is now Treasurer. Ann Arnoff will remain Secretary.

Liddy Johnson has lived on the islands since 1989 as a full-time resident. She has supported the islands through serving on the Board of the Captiva Civic Association and

working on fundraisers for organizations such as the Captiva Memorial Library, CROW, Big Arts, Gulf Shore Ballet and more.

"I am looking forward to helping grow our Community Foundation of Sanibel-Captiva so that its treasure will be an everlasting source of funds for our nonprofits, islanders, island workers and their families," stated Liddy, who has served on the Community Foundation board since its inception in 2000.

Al Hanser, the Chairman and CEO of Sanibel Captiva Trust Company, has served on the Foundation's board since 2002.

Ann Arnoff, an original Foundation board member, moved to Sanibel in 1988 and has actively served on many island nonprofit boards.

Another original Foundation board member, Michael Kelly lives on Captiva and has supported many island nonprofit organizations.

BSCF: New Officers, Board Members Named

The Bonita Springs Community Foundation has named Diane Lepola as Vice Chair and Cherrill Cregar as Secretary/Treasurer effective July 1.

Diane Lepola is currently a vice president and financial advisor with The McCaw Group at Morgan Stanley in Bonita Springs.

Diane has served as chairman of the board of the Bonita Springs Chamber of Commerce, as a board member of the Art League of Bonita Springs and The United Way of Lee County. She has also served as president of the Rotary Club of Bonita Springs.

Diane was honored as Citizen of the Year in 2003.

Cherrill Cregar moved from Michigan in 1996. Cherrill's talents included menu planning, special events and marketing.

She has served as president of the board of the Art

League of Bonita Springs, is on the Advisory Council of the Episcopal Church Women of St. Mary's Church, is a member of the Order of St Luke and is active in fundraising for several local civic groups.

Four new board members have also been named: Keith Butterfield, Brian Lucas, Jessica Novins, and Mary Lynn Ziemer.

Keith Butterfield has had more than 25 years of broad-based experience in the financial services industry. He has also supported the Connecticut Community Foundation, Speakers Assembly and helped with fundraising events for a number of local nonprofit organizations.

Brian Lucas, Vice President of Business Development/CIO for Bonita Bay Group, serves on the board of directors of Habitat for Humanity in Lee County and

in 2005, was named to Gulf-shore Business magazine's list of 40 people to watch in Southwest Florida under the age of 40.

Jessica Novins recently retired from the Chamber of Commerce where she had been Vice President and Finance Director for the past 11 years. Jessica has served as a volunteer for The Guadalupe Center's annual auction, Celebrate Bonita, and she is currently on the board of the Bonita Assistance Office.

Mary Lynn Ziemer has lived in Southwest Florida since 2004 and runs a fine clothing business with her husband, John. Mary Lynn is a member of the Bonita Springs Chamber of Commerce and serves as an Ambassador and President's Club member. She currently chairs the Community Awareness committee for the Foundation.

Bonita Springs Community Foundation: Celebrating Ten Years of Serving the Community

In 1996, a businessman from Ohio with a home in Bonita Bay wanted to contribute to a community foundation and wanted his donation to support the Bonita Springs community. The problem was while the Southwest Florida Community Foundation served Bonita Springs, it didn't focus solely on the greater Bonita Springs area. His solution: talk someone into starting a *Bonita Springs* community foundation.

At the same time, the community was recovering from devastating floods and residents were looking for a way to help those in need.

A small group of concerned citizens gathered together to look for a solution—one of those being the Ohio business man.

The group determined that they needed to establish themselves as an affiliate of a larger community foundation. This would allow them the administrative support and growth potential to make the greatest

impact in the rapidly growing community of Bonita Springs.

"It was attractive to me since you could put your funds in one place and then give them out as needed," said Jacke McCurdy, founding board member.

"It is hard to know just where your charitable dollars should go at the beginning of the year or before a catastrophe hits. With a fund in a community foundation you are ready when the need arises."

After meeting with area business leaders and hearing presentations from several foundations, the group decided to affiliate with the Southwest Florida Community Foundation.

In 1997, the first funds were established and the original board of directors was named.

The Foundation raised more than \$340,000 in assets its first year.

Now, with assets of more than \$2.7 million, the



Original Board Members John Spear and Audrey Georges at the BSCF Annual Meeting and 10th Anniversary Luncheon this spring.

Bonita Springs Community Foundation continues to provide leadership and resources to nonprofits serving the greater Bonita Springs area.

In 10 years, the Foundation has provided more than \$1.6 million in grants and scholarships through the endowed funds set up by community donors and membership in the foundation.

AFFILIATE LEADERSHIP:

BONITA SPRINGS COMMUNITY FOUNDATION

William B. Davis,
Chairman

Diane Lepola,
Vice Chairman

Cherrill Cregar,
Secretary/Treasurer

Barbara Akins
Joseph Ambrozy
Keith Butterfield
Frederick J. Costello
Jon Davis
Melanie Dehon
Patricia Johnson
Brian Lucas
Frances Luessenhop
Arden McCurdy
Dick Miller
Nancy A. Near
Jessica Novins
Harlan C. Parrish
Darren Robertshaw
David Shellenbarger
John Warfield
Joel Whittenhall
Mary Lynn Ziemer

www.bonitacommfoundation.com

New Endowed Funds of the Community Foundations

Doctors Ira and Udaya Dash Nursing Scholarship Fund

This Bonita Springs Community Foundation scholarship fund has been established for students majoring in Nursing at Edison College or FGCU. Candidates must demonstrate financial need and consider remaining in SW Florida to practice nursing.

Paul B. & Aline Flynn Scholarship Fund

This Southwest Florida Community Foundation scholarship fund has been established in honor of Paul and Aline Flynn for Paul's ten years of service with the Community Foundation for students studying in the area of communications, English or journalism.

North Fort Myers Lions Civic Association Fund

This Southwest Florida Community Foundation designated fund has been established for the following charitable purposes: Visually Impaired Persons Center of SWFL, Lion Eye Institute for Transplant and Research Foundation in Tampa,

Florida Lions Camp in Lake Wales and a North Fort Myers Cub Scout Pack.

Mary & Jack McNairy Fund

This Bonita Springs Community Foundation designated fund has been established to benefit the United Way of Lee County (for Bonita Springs).

THE FOUNDATION

Community Foundation Awards Major Annual Grants

Agency	Grant Award
Abuse Counseling & Treatment, Inc.	\$20,000
AFCAAM	\$20,000
Aids Resource Council of SWFL, Inc.	\$15,000
Alvin A. Dubin Alzheimer's Resource Center	\$17,750
American Red Cross	\$15,000
Animal Rescue, Inc.	\$6,130
Big Brothers Big Sisters	\$10,000
Boys & Girls Clubs of Lee County	\$15,000
Calusa Nature Center & Planetarium	\$10,000
Chabad Lubavitch of SWFL	\$5,000
Charlotte County Family YMCA	\$12,500
Charlotte County Homeless Coalition	\$12,500
Child Care of SWFL, Inc.	\$15,000
Children's Advocacy Center of SWFL, Inc.	\$15,000
Children's Home Society of FL, SW Div.	\$20,000
Clewiston Christian School	\$10,000
Community Cooperative Ministries	\$20,000
CROW	\$7,600
Deaf Service Center of SWFL	\$15,000
Dr. Piper Center for Social Services, Inc.	\$10,000
ECHO	\$15,000
Good Wheels, Inc.	\$15,000
Goodwill Academies SWFL, Inc.	\$10,000

Agency	Grant Award
Goodwill Industries of SWFL, Inc.	\$12,000
Guardian Angels for Special Populations, Inc.	\$5,000
Habitat for Humanity of Lee County	\$20,000
Hendry-Glades Behavioral Health Center	\$15,000
IMPACT	\$10,000
Island Coast AIDS Network, Inc.	\$13,500
Lee County Black History Society, Inc.	\$5,000
Lee County Sheriff's Office	\$25,000
Literacy Volunteers of Lee County	\$15,000
Our Mother's Home of SWFL, Inc.	\$15,000
Salvation Army	\$20,000
Sanibel Sea School	\$2,500
Senior Friendship Centers of Lee County	\$14,000
Sensitivity Awareness Workshop of SWFL	\$20,000
Special Equestrians, Inc.	\$20,000
St. Vincent de Paul Community Pharmacy of Charlotte, Co., Inc.	\$20,000
SWFL Historic Society	\$15,000
SWFL Marine Institute	\$15,000
SWFL Museum of History Foundation, Inc.	\$10,000
Tender Loving Care Complex, Inc.	\$15,000
Voices for Kids of SWFL, Inc.	\$8,000
Young Life of Lee County	\$5,000

2007 Scholarship Recipients *(cont. from page 3)*

Ruth Messmer Memorial

Thamara LeBlanc

Judge William J. Nelson

Heather Caseres

Jo Anne Olmsted

Luisa Ocampo

Robert & Dorothy Pence

Silvia Francisco

Thamara LeBlanc

Chet & Jannett Perry/Rotary

Christopher Huffman

Faye Lynn Roberts

Cindy Pohner

David G. Robinson

Eric Hopkins

Megan Sanford

Rockin' Christmas Fund

Angelique Pinault

Robert & Margaret Schikora

Mario Franchini

John & Mary Shanley

Daniel Castillo

Jonathan Grossman

Dana Perrone

Peter Ryba

Donya-Faye Wix

SWFL Professional Golf

Keith Braun

Jerico Brewer

Elizabeth Duncan

McKenzie Gatz

Kieran Gibson

Hilary Giles

Eric Johannsen

Jenna Lunger

Jon Manguson

Heather Meals

Benjamin Miller

Megan Riley

Daniella Rosa

Katelynn Thomas

Jacquielynn Wolff

Anne Sturrock Nursing

Eric Peer

Cindy Pohner

Michelle Taylor

SWFL Deputy Sheriffs Assoc.

Joseph Brock

Amanda Goff

Sam Sirianni

Allison Babes

Kristie Centner

Kelly Coomer

Michael Hill

Lindsay Scott

Chris Shepherd

Matthew Todd

Ryan Weekley

Felix & Edna Swain

Chanelle Campbell

Kendra Davis

Bernard Davis II

Raquel Gilmore

Jasmin Green

Chazmyn Newson

Wilfred Rivera

Carla White

Nicole Wilson

John & Madeleine Taeni

Donetta Beck

Lindsay Morris

Cindy Pohner

Debbie Radcliff

Ken Schwable

Michelle Slater

Tanya Villacis

TAX-WISE GIVING

ONE GOOD TURN MAY DESERVE ANOTHER AS CONGRESS CONSIDERS EXTENDING IRA DIRECT GIFTS

by John W. Sheppard



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.

In the Fall 2006 edition of Focus, we advised you that Congress, led by the Republicans, loosened up direct gifts “somewhat” from IRA’s to charity. The law, passed in August 2006, permitted direct charitable gifts from one’s IRA ONLY for 2006 and 2007, which is a tax benefit to the IRA owner. However, they limited these gifts from IRA owners older than 70 ½, and gifts not exceeding \$100,000 only for the years 2006 and 2007.

Surprise! Surprise! Alert! The new Democratic Congress will consider what will be called a “Stand Alone” IRA Bill to be called “The Public Good IRA Rollover Act of 2007” (they always make the titles sound good). The Bill has been introduced and supported by a number of Republican and Democratic Senators and Congresspersons.

The essence of the new law (if passed) would be to revise the present law to permit the following:

1. all IRS recognized charities would be eligible recipients;
2. life income, deferred charitable gifts (Charitable Gift Annuities and some other deferred charitable gift plans) from IRA’s could begin at age 59½;
3. outright and direct gifts to charities from an owner’s IRA, who is 70½ would not end in 2007 but would be made permanent, and the current limitation of \$100,000 would be removed—and be made unlimited.

Why the sudden change in thinking to loosen up charitable gifts? Two reasons! The first reason is that by permitting those at 59½ to make current income and deferred charitable gifts, the IRS would still be receiving income tax on the income, as it is drawn down by the IRA owner. The second reason was the overwhelming response to the 2006 Act. Records show that before year end, literally several billion dollars were released from IRA’s directly to charity in the last four months of 2006, and the giving has continued in 2007.

The proposed law, then, gives an added bonus to permit “IRA Life Income Rollovers”. In other words, a person more than 59½ would be permitted to “roll-over” a fund from his/her IRA to a life income plan such as a Charitable Gift Annuity, which could provide income to the donor and/or the donor’s spouse only—not to third parties. (If this provision is enacted the Community Foundation already has a Charitable Gift Annuity program in place.)

Now, does this mean that those who have charitable goals through the Foundation or other charities should stand up and cheer? Not quite yet! Right now you have the remainder of 2007 to direct from your IRA up to \$100,000—if you are more than 70 ½. Period! That’s it! But there does seem to be a rising sentiment to make the permission permanent, more comprehensive and universal. THE PRIMARY REASON WORKING AGAINST THIS NEW BROADENING OF IRA DIRECT GIFTING IS THAT CONGRESS GENERALLY FOLLOWS A “MONEY OUT MONEY IN” tax benefit rule. In other words, if there is to be a tax revenue loss, Congress looks to find another source of revenue to replace it. Whoever heard of congress and the federal government of ever cutting back a spending program?

This then is an Alert—to stay tuned and if you feel so inclined, write your Congressperson and Senator to support the proposed law, please do. They are-- SB 819 and HR 1419. BUT YOU CAN STILL MAKE DIRECT GIFTS TO THE FOUNDATION FROM YOUR IRA FOR THE REMAINDER OF 2007, UP TO \$100,000. However it is a very precise procedure.

We will keep you advised of how the Bill may or may not progress during the year. The movement of laws in Congress depends on many things including world events, political practicality and correctness, political action committees (yes there are Charitable and Church PACs) and unfortunately some grandstanding personalities—all of which sometimes come before the needs of the people, the public good or the public will.

For more information on the current or proposed laws, contact your attorney or tax advisor, or the foundation office at 274-5900.

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

Phone **239-274-5900**
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■ ■ ■
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■ ■ ■
A copy of the official registration and financial information may be obtained from the Division of Consumer Services by calling 1-800-435-7352 within the State. Registration does not imply endorsement, approval, or recommendation by the State. Registration # CH661

MISSION:

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

VISION:

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



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Save the Date

Ladies Luncheon
August 9, 2007

Arts & Attractions Grant Cycle
Deadline
September 5, 2007

Professional Advisors Golf
Tournament
September 2007

Bonita Springs Grant Cycle
Deadline
September 9, 2007

Founders Grant Cycle
Deadline
November 6, 2007

Annual Meeting
November 15, 2007
Harborside Event Center

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

Grant Cycle Highlight

The Arts & Attractions Grant Cycle was established to use existing resources to assist arts and attractions agencies, especially to encourage repeat visits, strengthen a need in the arts, provide the financial foundation that will encourage additional and create greater resources for growth, and partner with motivated professionals to maximize the expenditure and ensure a quality return on investments. Two types of grants will be offered: Marketing & Visitor Enhancement Grants and Basic Operating Grants.