

our community



GIVING MATTERS



INSIDE:  *The gift makers* 2  *\$1 million gift* 2  *How magic happens* 3 

JUAN **BENDECK** JOHN **SHEPPARD** JEN **BASEY** GUY **WHITESMAN**

BILL **SCHROEDER** LOWELL **SCHOENFELD** BRUCE **GREEN**

RICH **DURNWALD** CRAIG **FOLK** TREVOR **HARRELSON**

KIM **MORRIS** SCOTT **WHITE** ERIC **GURGOLD**

GAIL **MARKHAM** TOM **SMOOT**

THE GIFT MAKERS

SPRINGTIME. THE SEASON WHEN DAYS GET longer and temps start to climb. But Spring isn't the only thing heating up the Southwest Florida landscape. There's a new type of heat in our community, derived from the creative energy and support of philanthropists re-imagining ways to support local

SEE GIFT MAKERS, 2 ►

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causes that enrich lives and sustain the quality of our future.

They comprise an inventive gift-makers movement, a philanthropic twist on what's widely known as the maker movement. If you're like some of us, you may be wondering, what the heck is the maker movement? Think of it as an umbrella under which is gathered a culture of thinkers and doers driven by new ideas and new takes on existing ideas, all wrapped in solutions-based collaboration and collective action.

“Bringing people together and providing a virtual maker space to foster new opportunities that drive positive change is exciting. Philanthropists need the ability to share their vision and energy and take an active role in the impact they are having on the world.”

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

The modern-day maker movement traces its roots to the computer industry. The Homebrew Computer Club in Silicon Valley, for instance, was a gang of electronics hobbyists and techie tinkerers in the 1970s that incubated an industry and launched an entire generation of entrepreneurs. It included Homebrew members and Apple founders Steve Jobs and Steve Wozniak, who met through the club.

Fast-forward to today, and gatherings of like-minded makers of everything from, literally, soup to nuts, extend from high school clubs to college campuses to local

workshops and Maker Faires that draw over a million people a year worldwide.

Our local movement of gift-makers, new-idea bakers and status-quo breakers resides at the intersection of entrepreneurial thinking and civic engagement, where the Southwest Florida Community Foundation helps philanthropy merge with community aspirations.

Foundation President and CEO Sarah Owen says, “Bringing people together and providing a virtual maker space to foster new opportunities that drive positive change is exciting. Philanthropists need the ability to share their vision and energy and take an active role in the impact they are having on the world.”

Inventive Investing

A new slant on a time-tested charitable-giving strategy underscores Richard and Vicki Pitbladdo's activist philanthropy. Ardent community supporters, they collaborated with the foundation to establish a virtual \$1 million liquidating endowment: the Pitbladdos maintain the investment, from which they have pledged minimum cumulative distributions to their foundation donor-advised fund. The full \$1 million, plus net investment returns will be available for charitable distributions within a set number of years.

Mrs. Pitbladdo says the couple has been inspired by the many ways the foundation can help them improve the effectiveness of their philanthropic activities.

“We are passionate about supporting nonprofit enterprises with leaders who are themselves passionate, dedicated and responsible,” she says.

The arrangement allows the Pitbladdos to remain hands-on with their investment and determine how the proceeds are allocated in the community from their donor-advised fund, which embodies the collaborative nature of the maker movement.

Guy Emerich, a financial planning attorney with the Farr Law Firm, says foundation donor-advised funds represent a win-win philanthropic strategy.

“These types of funds are a terrific charitable-giving vehicle because the donors get to participate in what they want to see



VICKI PITBLADDO RICHARD PITBLADDO

happen, and at the same time they're able to help local efforts in very specific ways through the foundation, which knows the needs of the community.”

Scott White, president of Scott White Advisors, adds that foundation donor-advised funds are a great doorway into philanthropy.

“It's much simpler than setting up one's own private family foundation,” he says. “You can choose which organizations you want to support and decide to include other family members in the giving decision, or not. And you can witness what these organizations will do with your gifts before deciding if you'll continue to support them in the future.”

Engaging side-by-side with the foundation was a key element in the Pitbladdos' decision.

“It's much simpler than setting up one's own private family foundation,” he says. “You can choose which organizations you want to support and decide to include other family members in the giving decision, or not. And you can witness what these organizations will do with your gifts before deciding if you'll continue to support them in the future.”

— Scott White,
president of Scott White Advisors

“Working with the foundation gives us more confidence that supported projects are vetted and measured for results,” Mr. Pitbladdo says.

A Virtual Back Office

When it comes to gift-makers impassioned by a cause, establishing and running a nonprofit foundation to follow that passion can be a daunting obstacle – from keeping up with shifting tax laws, to navigating a range of state and federal regulations and filings, to cultivating and convening a governing board and managing day-to-day operations.

The foundation takes a collaborative tack on empowering such gift-makers, helping them overcome barriers by functioning as their virtual back office.

“I couldn't be doing this without the foundation's involvement,” he says. “To be able to tap into their infrastructure without incurring the expense and having to take all the time away from the core of what I'm trying to do is invaluable.”

— Robert Martin
Founder, A Bridge to a Cure Fund

This helped Robert Martin with his “Bridge to a Cure” initiative, which seeks to provide funding for the development of life-sustaining treatments for terminally ill children. It's a cause very close to Mr. Martin, who lost his 5-year-old granddaughter to brain cancer late last year.

“When a family learns there's really no hope, and you're going to lose your child or your grandchild,” he says, “you either withdraw or you rally and say we've got to try and do something about it.”

“Bridge to a Cure” is looking to advance the state of the primary approaches to cancer care – surgery, radiation and chemotherapy. Mr. Martin's goal is to leverage the power of big data – think IBM's Watson – to crunch oncology knowledge bases and drive new treatment options that can extend patients' lives, bridging the gap between the limitations of today's procedures and the future's potential cures.

Calling on strategic business thinking gleaned from 30 years as a Fortune 500 company division president, Mr. Martin has identified the first step: compiling a comprehensive database of clinical trials, treatments and outcomes, which he learned during his quest to help save his granddaughter doesn't exist.

“Such a repository of existing knowledge is necessary to inform the path forward to new options,” says Mr. Martin, who is exploring public-interest advocacy firms that can help him frame



JERRY KING DALE REISS

“We want to help fund and encourage the Dunbar community by establishing the types of programs we saw existing outside of our community.”

— TaSheekia Perry,
cofounder Impact Dunbar Fund

an effective action plan and quantify the funding resources needed to tackle the challenge. But he’s not going it alone. “I couldn’t be doing this without the foundation’s involvement,” he says. “To be able to tap into their infrastructure without incurring the expense and having to take all the time away from the core of what I’m trying to do is invaluable.”

Strengthening Community

Another local initiative leveraging a foundation alliance is Impact Dunbar, which has been established to serve the needs of girls and young women in the Dunbar community. Karen Watson, executive director of Our Mother’s Home; and TaSheekia Perry, the founder of Crowning Daughters for Success, co-founded the effort to inspire achievement by broadening girls’ and young women’s exposure to a range of educational, social and personal-empowerment resources.

“We want to help fund and encourage the Dunbar community by establishing the types of programs we saw existing outside of our community,” Ms. Perry says.

Ms. Watson says the fund, which is a component of the foundation’s Women’s Legacy Fund, serves an unmet need.

“We want our girls and young women to be exposed to experiences they wouldn’t have otherwise had,” she says. “How can you aspire to more if you haven’t been exposed to, or have the opportunities for, new experiences?”

The goal is to instill in those touched by Impact Dunbar the ability to see themselves succeeding beyond what they would otherwise see as limitations.

Ms. Perry says, “We’re going to do that by providing them with the resources they need to develop healthy self-esteem, confidence and character.”

Ms. Watson, who grew up in the Dunbar community, adds, “There have been many who have paved the way for me, and I feel I must do the same by giving back and lifting others.”

“These types of funds are a terrific charitable-giving vehicle because the donors get to participate in what they want to see happen, and at the same time they’re able to help local efforts in very specific ways through the foundation, which knows the needs of the community.”

— Guy Emerich,
estate planning attorney with Farr Law Firm

Contributions are being pooled in a multi-donor fund to collectively award grants to nonprofit organizations that advance the effort’s mission, which is on the road to success: through the community’s support, Impact Dunbar is poised to award its first grant by the end of the year.



KAREN WATSON TASHEEKIA PERRY

The Gears of Change

Scott Fischer has been building things for a long time. It started with motorcycles when he was 15, which the CEO of Scott Fischer Enterprises ultimately developed into a three-state network of top-performing Harley Davidson dealerships.



Fischer

And now that he has sold off a portion of his business, he’s ready to build something else he’s passionate about: increased capacity in Southwest Florida’s nonprofit sector.

His philanthropic work through Scott Fischer Enterprises has supported the community for years, including Blessings in a Backpack, the MDA, March of Dimes and Big Brother Big Sisters. That involvement has inspired him to establish a donor-advised fund at the foundation to enhance the impact of charitable organizations.

“One of the strengths of our company has always been strategic planning,” he says. “That’s such a key, and I think most nonprofits can benefit from the development of leadership skills that teach decision-makers how to be more strategic, so their organizations can be more effective.”

He believes business leaders can play a vital role in helping nonprofits better serve the community. “Not just financially,” he says, “but by leveraging our resources, such as community outreach, marketing expertise and the customer bases we’ve built up.”

For Mr. Fischer, it’s all about analyzing the linked cylinders that make nonprofits go farther, faster: leadership skills, board development and strategic planning.

“You’ve got to focus on the mission-critical aspects,” he says. “Nonprofits need to be as sharply focused on strategic leadership development as for-profit companies, but there aren’t always the resources to fund that.”

Enter Mr. Fisher, whose commitment to helping sustain a dynamic nonprofit sector springs from a debt he feels. “I truly believe that if you prosper in a community that has supported you, it’s essential you return that support.”

Funding a Healthy Future

Community philanthropy helps pave the way to a vibrant and viable future, particularly in those areas of critical need that contribute to the health and well-being of all who call Southwest Florida home.

“Working with the foundation gives us more confidence that supported projects are vetted and measured for results.”

—Richard Pitbladdo

Mental health has been prominent in the national conversation of late and is a particularly topical area of concern in Florida, which ranks 49th in funding per capita for mental health services.

Recognizing the crucial need for this key resource in Southwest Florida, John and Kappy King took a leadership role, establishing a \$1.1 million fund at the foundation to support Hope Clubhouse. The organization serves those struggling with mental illness, helping them recover and reintegrate into the community

SEE GIFT MAKERS, 4 ►



Sarah OWEN

President & CEO
Southwest Florida
Community Foundation

How Does the Magic Happen?

I was a magician’s assistant in college. I was sawed in half, pulled rabbits out of hats, and could make myself disappear- all with the help of the magician.

Yes, I know the secrets and no, I don’t share them. There is a code about these kinds of things in the world of magic. Although, I do take each of my children out on his or her 18th birthdays and share what I know. But by that age and with technology at their fingertips they are not that impressed.

After all, as the name implies I was always there to assist the real star of the show. They would probably much rather meet with the magician, as that is the person who creates the fascination of the unexpected.

I play a similar role in the world of giving in Southwest Florida. As part of the team at the Southwest Florida Community Foundation, I am merely an assistant to those who want to create something special in our communities- something magical that happens through giving.

In this issue of Our Community you will meet some of those people. Creators and gift makers who take the resources they have at their fingertips and use them to conceive and design gift making that impacts others. They are professional advisors, donors, advocates and neighbors and they are changing the giving landscape of Southwest Florida.

There are no tricks, illusion, or sleight of hand involved in gift making magic, just vision, generous hearts and a desire to make our world a better place.

These are secrets and stories I am happy to share. —OC

In Gratitude,

Sarah



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through access to counseling, education, employment, housing and overall wellness programs.

Mrs. King, who serves on the Clubhouse board, says, "This is a passion of ours because we've been involved with those living with mental illness for many years, and we saw that it was desperately needed in our area."

Roughly 250 people participate in activities annually at Hope Clubhouse, with up to 35 on site every day and a long waiting list for individuals and families seeking help. The Clubhouse provides a structured, work-ordered day, and members take up a variety of jobs in a supportive environment that fosters self-esteem and a sense of belonging as they focus on re-ordering their lives.

"We have an initiative for temporary employment, which is arranged by Clubhouse staff who visit area businesses that take on our members and help train them in a job skill that's specific to their business," Mrs. King says. "It's a resource that can make a real difference in people's lives."

Other philanthropists out to make a real difference in the health of our region are Jerry King and Dale Reiss, who have established the Jerome L. King Scholarship Fund. The fund provides scholarships to students pursuing their Certified Nursing Assistant credential from the Fort Myers Technical College.

Intended to help address our area's nursing shortage, the scholarships will jumpstart careers for students in the nursing field who otherwise might not be able to afford to go to school, denying them the chance to work in the health-care industry, a key employment driver.

"I was aware of the shortages we're facing," Mr. King says. "After visiting the school, it became clear that their program could school certified nursing assistants at a time when hospitals and other facilities are struggling with staff shortages. It seemed like a natural fit."

Ms. Reiss, who was taken by the

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— Jerry King,
Scholarship donor

students' career-in-a-year opportunity, recognized the impact the scholarships could have.

"Those of us who have been blessed with the ability to help sometimes forget how relatively small amounts of money can have a tremendous impact on the lives of others who may not be so fortunate," says Ms. Reiss, who devised the idea of giving back to the community in honor of Mr. King's 80th birthday.

The couple says they hope the fund will change lives and give young people an opportunity. Is he aware that one of the nurses he helped school may take care of him one day?

"That was not my motivation," he says with a chuckle. "But it certainly could happen. It would be an interesting coincidence."

GUY EMERICH DONNA BAKER



Living Legacies

When it comes to community philanthropy, whether through recent new strategies or in more traditional ways, Donna Baker has seen a lot change during her 67 years in Fort Myers.

She has held a charitable gift annuity at the foundation since just after the turn of the 21st Century. It made sense in the wake of her husband's passing and has provided her reliable monthly income over the past nearly two decades, even during rocky economic times.

"When the downturn hit, it was an invaluable investment because I continued to receive that income," she says. "It's still a great investment to this day."

Mrs. Baker says her giving strategy with the foundation is a decision she would make again, not only because it has provided her a steady income stream, but because it allowed her to give back to a community she cares so deeply about.

Mr. White, the certified financial planner, points out that caring about a cause is often a key element when it comes to charitable giving.

"It's rarely about tax planning in the end," he says. "It often starts out that tax planning may have been an incentive, but there always should be a passion the donor has toward a cause."

Such a cause made all the difference to Mrs. Baker.

"I wouldn't trade being able to do something for my community for anything," she says. "I'm very pleased I was able to give back, and I would highly recommend it to anyone who wants a good investment with people who care so much about our community. I'm proud to be a part of it."

Being a part of something bigger. That's what the maker movement is all about: a collective force for a future that unfolds one tomorrow at a time. And it's our gift-makers' impact today that helps ensure our region's tomorrows are full of promise, because their philanthropic strategies may differ, but the one thing they're all making together? A difference. —OC

It only takes a minute to change the world

Through a conversation with your wealth advisor or us, a line in your will or trust and a simple letter of request, you can change the world. By taking this step in planning your estate or your legacy giving, you can continue your giving tradition and become a change-maker today.

What do you care about? your family? the grandchildren? your pets?

These things are an important priority to many of us. How about your community? your alma mater? or do you have a particular passion or favorite charity?

Have you ever thought about who is going to give to the causes or organizations that you currently support after you are gone? Wouldn't you rather be in charge to direct your charitable dollars rather than it going to the government as taxes?

Our country is facing the largest transfer of wealth from one generation to the next...so we want to open the conversation. How do you want to leave your legacy? What do you want to be remembered for? Do you want your children or grandchildren to carry on your values and family giving?

After your heirs are taken care of, have you ever thought about leaving something for charity?

It's your money and your legacy, you have the control of both.

You can do this by simply telling us what you want or you can designate funds for specific nonprofit organizations or establish scholarship funds in your name with your own criteria, whatever want to do, wherever you desire in the world, you can do it all through the Southwest Florida Community Foundation.

It is so easy to do, and we can help! Just contact us at 239-274-5900 or email give@floridacommunity.com. —OC