

CFFK

COMMUNITY FOUNDATION
OF THE FLORIDA KEYS

IN PARADISE FOR GOOD.

Spring 2014

**On
Your
Mark,**



Get Set,



GO

What's Inside... On Your Mark

Everyone's personal interests and passions can be used to help improve the lives of others. We have many examples of people here in the Florida Keys who are putting their passions to work through philanthropy and making a significant impact. Our community offers countless opportunities to become involved.

This newsletter highlights the numerous ways people are making a difference — by donating, creating funds, volunteering, serving on boards, and leaving legacies. CFFK works every day with people to support the arts, protect the environment, educate youth, shelter the homeless, cure illnesses, and so much more — whatever they are passionate about to improve the lives of others.

In these pages are not only stories of some of the people who are making a difference, but also a “how to” road map on how easily you can make your mark in the community, too. As you will see, there are simple steps to follow and lots of tools and resources available to you at the Community Foundation.

Since 1996, CFFK has been focused on building and sustaining Key West and the Florida Keys by:

- inspiring philanthropy
- building community
- strengthening leadership

We're here to help. We are working with donors, fund advisors, nonprofit leaders, city and county officials, business leaders, and volunteers — all committed to making a difference.

How will your passions be carried forward? We hope you will be inspired to think about your own legacy and how you can make your mark ... today and for the future.

Robert Spottswood Chairman of the Board
Dianna Sutton President and CEO



3

A number of local philanthropists have made a difference by creating legacies that support their passions.



The Florence Fox-Loeb Music and Theatre Arts Endowment at CFFK helped support a special concert by the Chamber Orchestra Kremlin to commemorate Florence's 100th birthday. The concert was produced by Impromptu Classical Concerts.

4

Whether you participate as a volunteer, board member, or donor, there are countless opportunities to become involved in the community and make a significant impact.



Kristie and Larry Metcalf of Friends of Fort Taylor are honored at the 2014 Unsung Heroes Luncheon.

6

By setting up wills and estate plans, donors have made their mark to support causes they care about.



Grants from the Marion Stevens Fund support the work of One World One Canvas. Shannon Perkins (center), director of One World One Canvas, receives a grant from Marion Stevens Fund Advisors Joan Higgs and Michael Ingram.

<p>2013-14 CFFK Board of Governors Robert Spottswood, <i>Chair</i> Susan Cardenas, <i>Vice Chair - Development</i> Roger Heinen, <i>Vice Chair - Marketing</i> Greg Oropeza, <i>Secretary</i> Ann Reynolds, <i>Vice Chair - Grants</i></p>	<p>Karen Sharp, <i>Treasurer/Vice Chair - Finance</i> Brian Wruble, <i>Vice Chair</i> Todd German Michael Ingram Rita Linder Sandra McMannis Bill Porter Allan Wimer Susanne Woods</p>	<p>Special Advisors Jon Allen Ron Burd Neil Call Thomas Clements John Dolan-Heitlinger Ken Domanski Edward B. Knight Holly Merrill</p>	<p>Board Advisors Ray Baker Ed Block Michael Dively Shirley Freeman Bobby Highsmith</p> <p>President and CEO Dianna Sutton, CFRE</p>
--	--	---	--

On Your Mark

Whether your interest is in furthering arts and culture, protecting the environment, or improving health care, you can make your mark by creating a lasting legacy that will impact the community for many years. A number of local philanthropists have made a significant difference by creating funds that support their passions.

Making a Difference

Philanthropy is about people supporting things they are passionate about in a community they love. Whether their “community” is local, national, or even international, philanthropy is about people making a difference.

One type of fund that individual donors are creating increasingly at community foundations are Field of Interest funds, which benefit a broad charitable purpose within a specific field, such as arts or the environment. CFFK works with donors to set the criteria and manage the selection process for making grants from these funds. Some fund advisors have empowered CFFK’s Grants Committee to select the projects and recipients. Some establish advisory committees for grant selection.

Michael Dively

Race. Gender. Sexual orientation. Class. Religious preferences. Celebrating differences and promoting equality has been a passion for Michael Dively. He is making his mark by bringing people together to raise awareness and help solve critical community issues.



The *Michael Dively Social Justice and Diversity Endowment* was created as Michael’s legacy to Key West. He lived in Key West for more than 20 years before relocating to Santa Cruz, California, in 2012. As

a former Michigan state legislator, lawyer, and philanthropist, he helped bring people and financial resources together to solve critical community needs.

Grants from the Endowment for the past two years have been awarded to the Tropic Cinema to present a series of four documentary films on the theme of social justice. The film series, titled “4 Nights 4 Justice,” has explored a number of social issues, including the economic woes of the middle class, discrimination against race and sexual orientation, issues of incarceration, immigration problems, controversial behavior modification programs, and the overcrowded justice system. Filmmakers from all of the films have appeared in Key West to talk after each screening.

Michael established the Field of Interest Fund to identify, articulate, and educate people about social justice issues. “Creating this fund is a way for people to collaborate and might serve as a catalyst for others to get involved to develop or create a program on their own,” says Michael.

Emily Boyd Lowe

Emily Boyd Lowe made her mark by performing and teaching music to so many people in her lifetime. Her joy for music now lives on for generations through a fund that awards student scholarships, supports musicians, and boosts the careers of young music teachers.

When Emily passed away in 2012, a Field of Interest Fund was created in her memory by her husband, Donald, and beloved friends who contributed to the fund, to promote music, specifically classical music. Emily was a voice teacher at the Florida Keys Community College and founded the Keys Chorale. The fund supports organizations and students of all ages wanting to improve their ability to perform classical music, such as providing stipends for musical study, underwriting concerts for musicians to showcase their talents, and purchasing music and musical instruments.



Three inaugural grants were awarded last year from the *Emily Boyd Lowe Music Fund*: FKCC Keys Chorale received a grant for student scholarships; Music Teacher and Instrumentalist Donna DeForrest was selected because her contributions to music represent Emily’s love of teaching and performing; and former music student Mandy Gibson received a grant to help jumpstart her career as a music teacher.

A new round of grants will be awarded this Spring.

Florence Fox-Loeb

Florence Fox-Loeb continues to spread her love of classical music to the Keys community. In fact, she might never have known that her love for music could be used to bridge cultures and geography.

Born a century ago, Florence’s 100th birthday was commemorated March 30th in a special performance by the Chamber Orchestra Kremlin from Russia, presented by Impromptu Classical Concerts. It was funded in part by the legacy fund that was created through Florence’s estate — the *Florence Fox-Loeb Music and Theatre Arts Endowment*, a Field of Interest Fund at CFFK.



HOW TO CREATE A FUND

Individual donors and charitable organizations establish funds at CFFK to support a variety of causes which provide grants for individuals and organizations. CFFK is home to more than 120 charitable funds and endowments, which total more than \$10 million. Here’s how you can create a fund at CFFK:

- 1) Decide When to Give**
Now, through a named fund, or through our Legacy Society
- 2) Decide What to Give**
Almost any type of appreciated asset can be used as the basis for your fund
- 3) Choose the Name for Your Fund**
Your name, family name, or you can choose anonymity
- 4) Choose a Type of Fund**
We provide a wide variety of funds, such as the Field of Interest Funds highlighted on this page, to meet your charitable interests
- 5) Contact Us**
We provide charitable investors with personalized service, local expertise, and community leadership. Contact us at cffk@cffk.org or call 305-292-1502.

Get Set

By starting a fund, making a donation, or providing your service and skills to a nonprofit organization, you are creating a lasting mark in the community. Whether you participate as a donor, volunteer or board member, there are countless opportunities to become involved and make a significant impact to the quality of life.

Unsung Heroes Inspire

Seventy-five of our community's incredible volunteers were honored at the 2014 Unsung Heroes Luncheon. They are making their mark by donating their time, talents, and resources to Monroe County's nearly 400 charitable nonprofits. These nonprofits depend on volunteers to help build awareness and make their programs and services available and accessible to the entire community.

CFFK shined the spotlight on the Volunteers of the Year at a sold-out

luncheon on January 24th. Over 300 people attended the event and each of the volunteers received a certificate of recognition for their service. This year's event was underwritten by Dr. Shirley Freeman and Harvey Server. Dr. Freeman is a former Chairman of the Board and a current CFFK Board Advisor.

Dr. Freeman spoke about the importance of civic involvement and how one person can make a difference and create a lasting impact.

She cited the example of CFFK founder Ray Baker and his efforts to start a community foundation in the Keys in 1996. "Ray Baker is the one responsible for CFFK," said Dr. Freeman. "He did his research and learned that leaving money to a community foundation was the best way to assure his wishes would be carried out in the future." Eighteen years later, CFFK has more than 120 funds and endowments under management totaling over \$10 million and has helped facilitate more than \$17 million in grants to organizations and individuals.

Since the Unsung Heroes event was created in 2001, more than 1,000 Keys volunteers have been recognized for their individual efforts. Additional photos of the 2014 Unsung Heroes can be found on CFFK's Facebook page and at www.cffk.org. Please join us in congratulating these inspiring volunteers for giving their time and talents to the community.



CFFK Chairman Robert Spottswood, Unsung Heroes Sponsors Harvey Server and Dr. Shirley Freeman (also a Board Advisor), and Ray Baker (CFFK Founder and Board Advisor)

HOW TO MAKE A DIFFERENCE

Nationally, more than 64 million people volunteer 7.9 billion hours of service annually with an estimated value of \$171 billion. In Florida, 23% of all residents volunteer an average of 31 hours per person. Looking for an opportunity to volunteer? Search CFFK's extensive database of Monroe County nonprofits at www.cffk.org and see where you can make a difference.



Delores Robinson, Coral City Elks Lodge Honoree Priscilla Sullivan, and Darlene Bennett



Father Thomas Sterner, Honoree Dale Humphrey (Florida Keys Outreach Coalition), and Honoree Reverend Stephen Braddock (Monroe County Homeless Services Continuum of Care)



Key West Orchid Society Honoree Joe Liszka

Leaders Impact Nonprofits

Nonprofits need leaders with excellent management and governance skills, and they need to know how to collaborate and maximize resources, according to studies. The U.S. has seen tremendous growth in the nonprofit sector in the last 10 years. A new study from the Urban Institute says that the number of nonprofits has grown by 25 percent, while the number of for-profit businesses has grown by only one-half of one percent.

There's more pressure than ever for nonprofits to operate like businesses. CFFK's Leadership Success Academy (LSA) board training program was created

to address the need for leadership development.

Over 350 nonprofit leaders in Monroe County have now completed the board training program to further develop their skills and make a more significant impact on the nonprofits they serve. In the last seven years, nearly one-fourth of all Monroe County charitable nonprofits have completed the program.

The 2014 LSA program concluded April 10 with the graduation of nearly 60 participants from 25 nonprofit organizations.

The LSA is partially underwritten by a grant from the Marion Stevens Fund and the Bob and Martha Sauer Endowment.



2014 Class of LSA (in alphabetical order): D.A. Aldridge, Mackinzie Ash, Lucy Barker, Michael Bartolotto, Kristy Callaway, Dr. Jerry Caputo, Bob Cardenas, Teresa Condas, Pat Cummings, Amber DeBevec, Robert Evie Evers Kling, Michael Geida, Jeremy Green, Kim Gregory, Rodney Gulatte, Jr., Susan Hammaker, Michael Holmes, Maria Jones, Alexander Kwolek, Leah Maki, Kelly Manghir, Pam Martin, Mindy McKenzie, Misha Perry, MaryCarlin Porter, Jennifer Powell, Blaine Rineer, Karen Schievelbein, Marv Schindler, Mary Shee Strickland, Alexis Taylor, Gavin Townsend, Barbara Weikel, Jodi Weinhofer, Kristina Welburn, Rev. Larry W...

Donors Respond to Community Needs

More than 100 individual donors and fund advisors who are making a difference by investing in the community attended CFFK's Annual Meeting in February. They also gathered in March for the Annual Donor Appreciation Party.

CFFK is grateful to our Very Important Partners in Paradise (VIPs) and Friends whose gifts make our programs and services possible. These leaders are the heart of the Community Foundation. We are also grateful to the Fund Advisors, our collaborative partners in helping build the community, and to the Legacy Society members who have made future gifts.

At the Annual Meeting, CFFK highlighted the year's accomplishments and discussed planned programs and services. CFFK's 2013 Report to the Community and the complete 2013 investment report are both available at www.cffk.org.

At the Donor Appreciation Party, hosted by Board member Brian Wruble and Kathleen Bratton, past



Kathleen Bratton and Brian Wruble

Board Chairman Jon Allen was recognized for his community leadership and significant contributions to CFFK (see sidebar). Active community member Rosi Ware spoke about the importance of legacy giving and creating a lasting impact that will benefit the Florida Keys for future generations (see page 7).



Jim Hall and Billy Cartledge



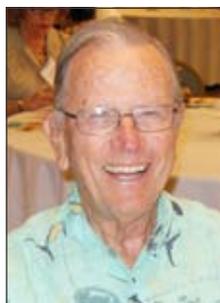
Roger and Mary Ann Westerlund with Bryan Green (center)



Bert Whitt, Gail Lima-Richmond, Dennis Beaver



Kate Regan and Ken Silverman



Donald Lowe



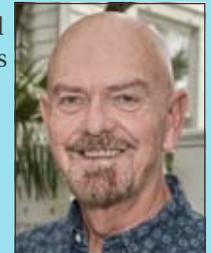
Victoria Leigh and Bill Porter



...a, Teresa Beard, Gerald Bolduc, Kathleen Bratton, Preston Brewer, ...a DePiero, Ganine Giorgione Derleth, Kent Ducote, Jeff Egelston, ...hael Hayes, Matthew Helmerich, Sandra Higgs, Janet Hinkle, Leslie ...a McRae, Constance Miller, Dottie Moses, Steve Mungall, Cheri ...arin, Blair Shiver, Jim Sholl, Piper Smith, Margie Smith, Vanessa ...hite, Marsha Williams, Barbara Wright, Christine Young, and Liz Young

Making a Difference

VIP and current Board Advisor Jon Allen recently announced he will be leaving Key West and relocating to Santa Rosa, California. He moved to Key West in 1998 and is owner of the Island House Resort. He was a member of CFFK's Board of Governors for six years, serving as its Chairman from 2007 to 2010.



Jon Allen

In the community, Jon has served as chair of the District Advisory Committee of the Tourist Development Council and on the boards of the Lodging Association of the Florida Keys and Key West, Key West Business Guild, Equality Florida, and Friends of the AIDS Memorial, among many others.

"I feel strongly about supporting the Community Foundation's mission to increase philanthropy and support the work of nonprofits and the wide variety of causes in the Keys," says Jon. "I'm inspired by the possibilities for this community. Working together, I know we can all make a difference."

Jon may be leaving Key West, but the mark he left on this community through his philanthropic leadership will be felt for generations to come.

HOW TO BECOME A VIP

Like Jon Allen, a dedicated group of community leaders are helping provide the leadership and support to ensure that CFFK enhances the quality of life in the Florida Keys through philanthropy and leadership. These leaders are the Very Important Partners in Paradise (VIPs). VIPs are helping achieve the Marion Stevens Fund challenge campaign (see Page 6) and support the programs and services of CFFK through an annual gift of \$5,000 or more. To find out more about the VIP program, the work it supports, and the benefits of membership, please go to www.cffk.org or contact cffk@cffk.org.

HOW TO BECOME AN EFFECTIVE LEADER

The Leadership Success Academy is an essential board training program where you can learn the secrets of successful nonprofits, engage in more powerful and informed decision making, and move your organization from good to great. For more information on the program, session topics, and material covered, go to www.cffk.org.

Go

Donors have made their mark in the community by setting up wills and creating estate plans to support causes they care about. By detailing their charitable goals, donors create lasting legacies and change lives for generations to come.

Changing Lives Through Music

Two music funds at CFFK and a local music group are sharing more than \$12,000 which will be used to help make a difference in music appreciation and education in the community. The money was raised from last December's production of "Jerry's Girls" at the Tennessee Williams Theatre. The two funds managed by CFFK — the *Emily Boyd Lowe Music Fund* and the *Franko Richmond Music Scholarship Fund* — along with the Keys Chorale each received \$4,040 to support their respective missions.

The *Emily Boyd Lowe Music Fund*, established at CFFK in 2012, is a Field of Interest Fund created in Emily's memory to promote music, specifically classical music (see page 3).

The *Franko Richmond Music Scholarship Fund*, established at CFFK in 2010, provides scholarship support to a Key West High School graduating senior seeking to pursue the study of music, spe-



Producer/Musician Vincent Zito (far right) presents a check to Gail Lima-Richmond (Franko Richmond Music Scholarship Fund), Dean Walters (FKCC Keys Chorale) and Don Lowe (Emily Boyd Lowe Music Fund).

cifically piano, at a college, specialized or technical school or other institution of higher learning. Franko was a pianist, composer, teacher, and performer in Key West who passed away in 2009.

Performed last December, "Jerry's Girls" was produced by local musician Vincent Zito and the Keys Chorale.

Changing Lives by Connecting Cultures

For the past four years, a small nonprofit, One World One Canvas, has been giving students the opportunity to experience other cultures while providing art workshops across the world. Grants from the *Marion Stevens Fund*, a Donor Advised Fund at CFFK, have helped support the students' travel and work in places such as Haiti and Costa Rica.

Recently, the *Marion Stevens Fund* provided support for the group's trip to Kenya. Before leaving, student Nena Guzman said, "I am desperate to make an impact on the lives I encounter in Africa and bring back wonderful experiences and information to the Keys."

Shannon Perkins, Key West High School art teacher, is the founder and director of One World One Canvas. The group's prime motivation is what

they feel in their hearts — the joy of helping others. "The Marion Stevens Fund is one of our major contributors and strongly responsible for the success of our organization," says Shannon. "They are positively affecting lives in Key West and across the globe."

In Haiti, the group made arrangements to stay at an orphanage and provided art workshops, necessities, food, and love to over 600 children. In Costa Rica, they provided nourishment, clothing, and friendship as part of their art program to underprivileged children.

The experience has been life-changing for the students involved. Says Shelbi Swanson, one of the student participants, "After traveling with this program last year, I came back with a changed ego and an experience that I will never forget."

Challenge Builds Sustainability

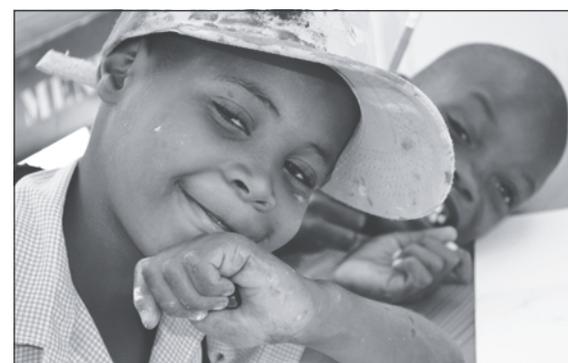
Last Fall, CFFK was presented with a special opportunity to strengthen its philanthropic leadership and community impact. The Marion Stevens Fund Challenge Campaign will grow an endowment to support CFFK's programs and services that strengthen philanthropy and leadership in the community.

To date, more than \$120,000 has been raised toward the \$200,000 goal. During 2014, all unrestricted contributions up to the challenge goal are being counted toward the endowment match. With the successful completion of the Challenge, CFFK's operating endowment will total nearly \$500,000, which will provide an annual source of revenue.

This is a significant opportunity to move the Community Foundation toward sustainability. CFFK is grateful to the Marion Stevens Fund Advisors and donors who have contributed so far to the challenge and are helping to sustain philanthropy in the Florida Keys.

HOW TO SUPPORT THE CHALLENGE

Multiply Your Giving. Every \$100 gift equals \$150. To help sustain the future of philanthropy in the Keys by contributing to the Marion Stevens Challenge, contact cffk@cffk.org or go to www.cffk.org to make an online donation.



One World One Canvas participants in Haiti

Leaving a Lasting Mark

Civic leaders Rosi and Jeff Ware love their “adopted home” of Key West so much that they want to leave their legacy in the Keys. They joined CFFK’s Legacy Society to make that happen.

“The community here has been so good to us that we want to give back,” says Rosi, “and in what better way than through the excellent services of CFFK.”

Rosi recently spoke about the importance of legacy giving at CFFK’s Annual Donor Appreciation Party. Through their wills and estate plans, donors can benefit the community for generations to come.

Rosi and her husband, Jeff, semi-retired to Key West in 2003. She began working as an internal consultant for WPP, the world’s largest advertising and marketing group. She has had an extensive career spanning marketing, market research, product devel-

opment, advertising, and strategic planning.

Rosi is also an active community member. She is currently the Board Chair of The Studios of Key West, a member of District Advisory Council 1, and actively involved in the arts community. On weekends, she is a counselor for mentally-disabled adults at the MARC House. Rosi is the 2013 recipient of the Red Cross Humanitarian of the Year Award.

“We want to support the arts, MARC House, and the Keys’ natural environment and gardens,” says Rosi. “Working with CFFK was by far the easiest and best way to do that.”

CFFK has over 45 Legacy Society members who have pledged their support to the Florida Keys community. The Legacy Society’s collective gifts are estimated to be at over \$30 million, and their wishes today will be honored by CFFK in the future.



Rosi Ware

HOW TO JOIN THE LEGACY SOCIETY

Through your will, estate plan, retirement plan, or life insurance policy, you can benefit causes (local, state, national, or international) for future generations. As a member of CFFK’s Legacy Society, you will know with confidence that your charitable goals will be honored by the Community Foundation well into the future. Interested in joining the Legacy Society? Please contact cffk@cffk.org.



Anthony Minore and William Beck



Charles Newman and Jane Dawkins



Todd German and Lesley Salinero

HOW TO LEAVE A LEGACY

A charitable bequest is one of the easiest ways you can leave a lasting impact on the community.

WHAT ARE THE BENEFITS OF YOUR BEQUEST?

- Receive estate tax charitable deduction
- Lessen the burden of taxes on your family
- Leave a lasting legacy

HOW DO YOU MAKE A BEQUEST?

With the help of an advisor, you can include language in your will or trust specifying gifts to be made to family, friends, and the Community Foundation of the Florida Keys as part of your estate plan.

WHAT ARE YOUR BEQUEST OPTIONS?

A bequest may be made in several ways:

- Gift of a percentage of your estate
- Gift of a specific dollar amount or asset
- Gift from the balance or residue of your estate

HOW DO YOU MAKE A BEQUEST OF YOUR RETIREMENT ASSETS?

A retirement asset, such as an IRA account, is an excellent and easy bequest. If the IRA were given to your family, much of the value may be lost through estate and income taxes. By designating CFFK as the beneficiary of all or part of your IRA, the full value of the gift is transferred tax-free at your death and your estate receives an estate tax charitable deduction.

WHERE CAN I FIND MORE INFORMATION?

Talk to your professional advisor or contact cffk@cffk.org to learn about the Legacy Society.

Fox-Loeb,

Continued from Page 3

During her many years in Key West before her death in 2009, Florence donated her time and resources to organizations she loved, including The Red Barn Theater, The Key West Woman’s Club, Helpline, and numerous organizations that helped animals. Florence was also an enthu-

siastic supporter of Impromptu Classical Concerts and loved classical music, especially music for strings. She served Impromptu for over 30 years as a volunteer, a board member, president of the board, and finally as a valued advisor.

For the past several years, the Endowment has supported classical concerts of Impromptu through the “With Love, Florence” concert series.

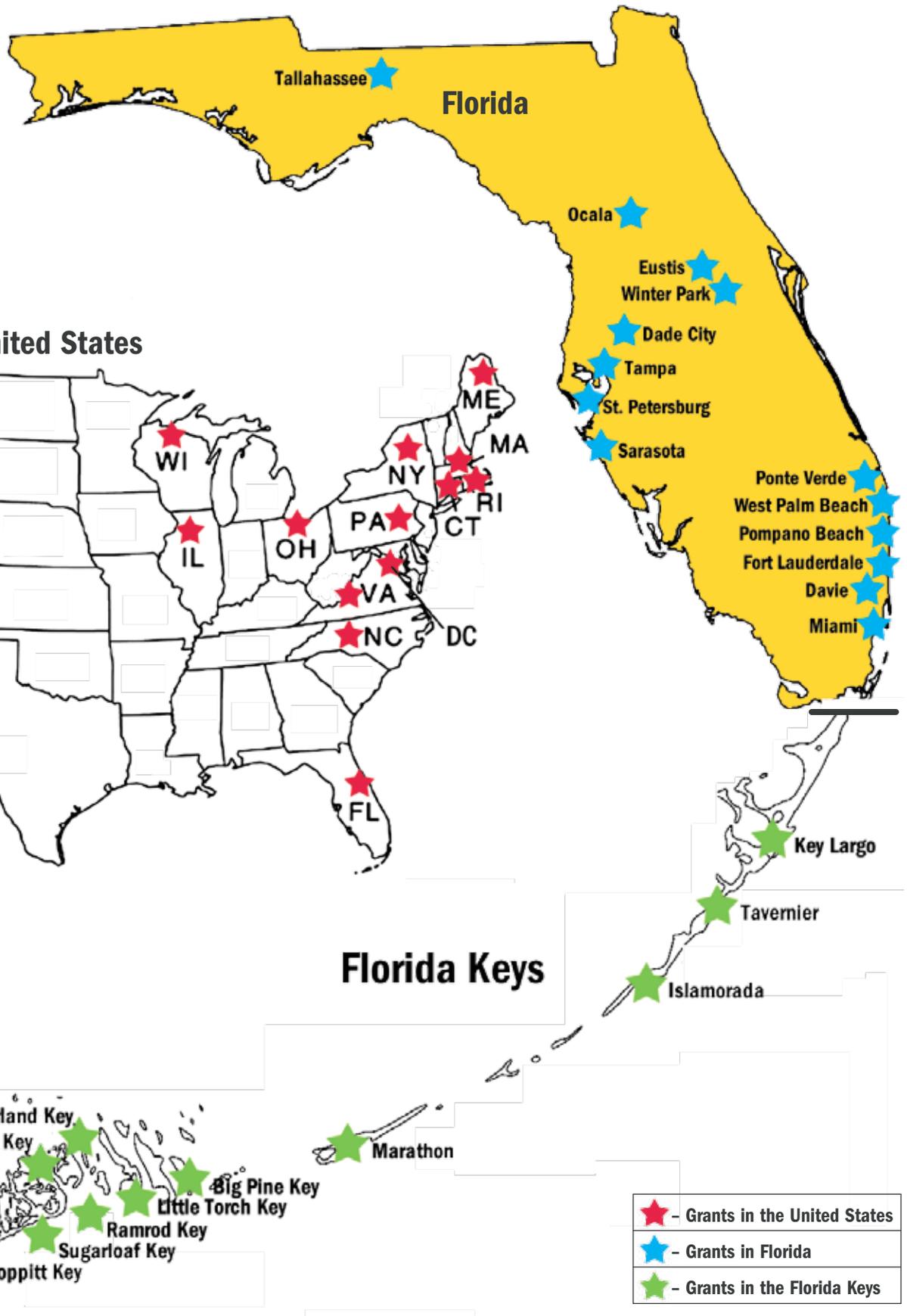


Ann Reynolds (CFFK Vice Chair – Grants), with Paul Sherman (Impromptu President), Chamber Orchestra Kremlin Conductor Misha Rachlevsky, and Lillian Van Hest (Impromptu Vice President).

Making a Mark in the Keys and Across the Country

Much work is being done to meet CFFK's mission of strengthening the nonprofit sector, working with donors to build philanthropy, and identifying and meeting unmet community needs.

As our world gets smaller through increased technology and travel, "community" has expanded to include all parts of the globe. In the past 10 years, CFFK donors have supported 395 individuals and organizations with grants for programs and scholarships in all parts of the Florida Keys, throughout the state of Florida, and in 17 states across the country.



... and Around the World

Some CFFK grants have an impact around the world. Grants have been awarded for international relief efforts, international economic development initiatives, and programs for international research and studies, among other purposes.



300 Southard Street, Suite 201
 Key West, FL 33040
 305-292-1502
www.cffk.org / e-mail: cffk@cffk.org

