



2022

Annual REPORT

PREPARED BY

CHARLOTTE COMMUNITY FOUNDATION

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THANK YOU

A message to our Donors,

On behalf of our Board of Directors and staff we sincerely thank you for your continued support. It is through your generosity that we are able to make an impact in our beloved community.

About Charlotte Community Foundation

The Charlotte Community Foundation wants to help build an enduring community of philanthropy that addresses community needs now and in the future. Our goal is to enhance the quality of life for Charlotte County residents by nurturing a community of givers and connecting them to the causes that make a difference.

We do so by serving our donors, advocating for philanthropy, supporting other local nonprofit organizations, and through our involvement in community initiatives.

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Letter from our CEO

Looking back on 2022, the Charlotte Community Foundation faced unprecedented challenges that tested the resilience of our community. But in the face of natural disasters that wrought destruction upon our region, we rose to the occasion and proved our tenacity.

As our community faced uncommon hardships, our foundation remained steadfast in its unwavering mission of "Connecting People Who Care with Causes that Matter." Through our impactful grants and scholarships for higher education, we were able to support those who needed it most.

With the incredible generosity of our donors, we were able to distribute millions to local causes, with a significant portion going directly to those affected by the natural disasters that struck Charlotte County. Specifically, through our strategic partnerships with county, city, and state organizations, CCF provided over \$1.5 million in financial assistance with an additional \$150,000 of in-kind donations to more than 500 households for disaster recovery. We take pride in our ability to make a difference in people's lives, and we remain committed to continuing this legacy of giving for years to come.

The grants we distributed had a tremendous impact on our community, from supporting local food banks to aiding Charlotte County Habitat for Humanity's homeownership program. We also helped offer education and afterschool programs through the YMCA, Charlotte County Boys and Girls Club and provided aid to our senior and elder populations.

In the aftermath of Hurricane Ian, we worked closely with TEAM Punta Gorda, implementing the Volunteer Reception Center and coordinating over 520 volunteers to help with disaster relief efforts, totaling over 2,500 hours of work.

Despite the obstacles, we were also able to award a record number of Higher Education Scholarships, totaling an impressive \$202,900. These awards went to students who had demonstrated remarkable resilience in the face of adversity.

As we enter the new year, our foundation is determined to continue its unwavering dedication to the community we serve. We understand that the events of the past year have left an indelible mark on our society, particularly on those we support. Therefore, we are more committed than ever to help rebuild the community by extending a hand to those who need it the most.



Ashley Maher
**Chief Executive
Officer**

Letter from our CEO

Our foundation is committed to continuing its efforts to improve the community and will not become complacent in its mission. We recognize the importance of moving forward with vigor and purpose, and we intend to do so by implementing a series of new initiatives. Through these programs, we aim to deepen our relationships with existing partners and forge new alliances to better serve our community.

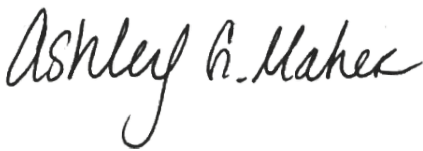
The recipients of our funding are at the heart of our foundation's mission, and we are cognizant of the tremendous responsibility that comes with supporting them. As a responsible steward of these resources, we recognize the weight of our obligation to support growth and achievements today and into the future. With this in mind, our aim is to help them reach their full potential and achieve their dreams. Our commitment to this cause is unwavering, and we look forward to making a positive impact in the lives of many more deserving individuals.

We are keenly aware that the challenges we face are daunting, but we remain steadfast in our resolve to meet them head-on. By working together and harnessing the power of our collective efforts, we are confident that we can help our community rebuild and emerge stronger than ever before. Our work has shown us the importance of collaboration in the face of challenges, and we are inspired by the resilience and dedication of our donors, partners, and staff. Together with advisors, donors, and community leaders, we will continue to deploy funds and resources for maximum impact.

As we lead positive systemic change that strengthens Charlotte County, we invite you to learn more about our commitment to our mission and stewardship of charitable funds in this year's annual report.

Thank you for being part of our efforts to build a stronger and more resilient community in Charlotte County.

Sincerely,



Ashley Maher
CEO of Charlotte Community Foundation



Suzanne Herron
Chief Financial
Officer

Financial Review

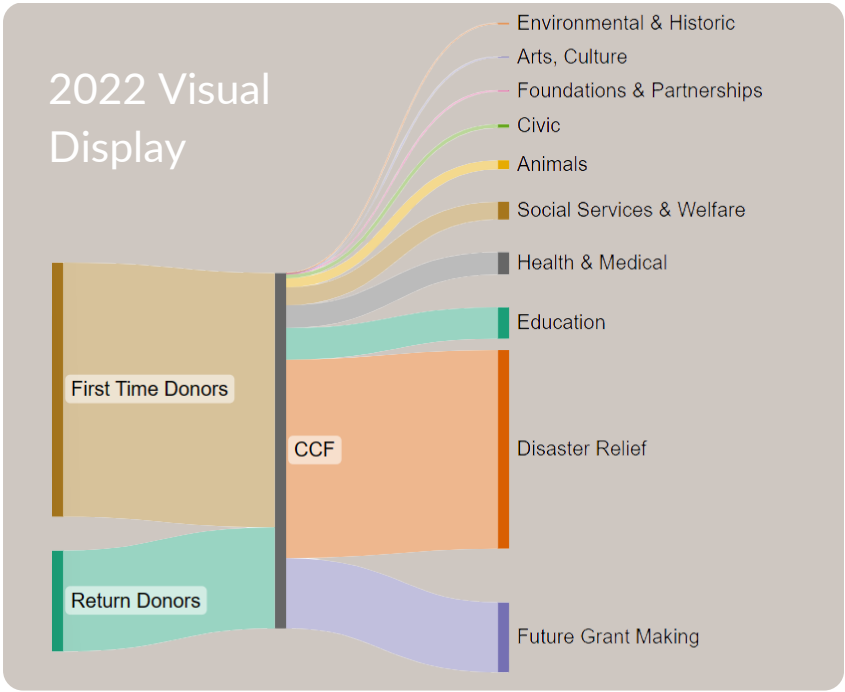
2022 pushed the boundaries and stretched the Foundation to meet challenges never presented before, giving the Charlotte Community Foundation the opportunity to address the needs of our region in unprecedented ways. The responsiveness of our community members, both near and far, to the distress inflicted by disaster and the outpouring of their philanthropic spirit delivered hope for a brighter future.

The Charlotte Community Foundation saw an increase in donations, both restricted and unrestricted to assist with immediate and long term recovery efforts for Charlotte and Lee counties. These funds have been utilized to provide direct assistance to individuals, repair infrastructure for critical needs of our local nonprofit agencies and has allowed for CCF to earmark funds for Long Term Recovery efforts.

Even though we have seen an increase in the amount of funds coming into the Foundation, we have also increased the amount of funding released back into our community. As the Center for Philanthropy in Charlotte County, it is our responsibility to be good stewards of donor dollars, all while making a positive impact within Charlotte County. 2022 was a record year for our granting and scholarships. Just last year the Foundation awarded over \$200,000 in higher education scholarships, being the second largest area of distributions outside of our disaster relief granting.

Types of Funds

- Agency Fund
- Donor Advised Fund
- Community Fund
- Field of Interest Fund
- Designated Fund
- Scholarship Fund



Development Review

2022 was a year that tested the leadership and resiliency of the Charlotte Community Foundation (CCF) and many of our partners in extraordinary ways.

On September 28th, Hurricane Ian ravished Southwest Florida as one of the most devastating storms to affect our region. The Charlotte Community Foundation worked tirelessly to secure our infrastructure and coordinate with outside partners to ensure that our systems were ready to respond to the needs of our community members. Within 48 hours, our office was up and running, hosting many local nonprofit organizations that could not return to their locations. Our building was also utilized by Team Rubicon as a Base Camp and opened a Volunteer Reception Center with the help of TEAM Punta Gorda. To date, we have distributed more than \$1.5 million dollars in funding, with plans to continue supporting our community as time goes on.

Our impact and quick response to the needs of the community would not have been possible without our generous donors, many of whom contributed to the foundation for the first time. Thanks to that generosity, the Charlotte Community Foundation distributed over \$1.5 million in grants and direct assistance. In order to offer this level of support, we worked hand in hand with state and local agencies to secure emergency relief funding from the Department of Economic Opportunity, Charlotte County Board of County Commissioners, and private family foundations. Additionally, in 2022, we distributed a record amount of higher education scholarships to local students, many of whom are returning to school in order to supplement their careers.

The Charlotte Community Foundation was also called upon to lead a feasibility and needs assessment to assist the Board of County Commission in response to the closing of the Cultural Center, we became the fiscal agent for Lee and Charlotte County by the Office of Disaster and Emergency Management to distribute funds to homeowners who experienced great loss due to unexpected tornadoes that devastated different communities throughout Southwest Florida and distributed funding to local nonprofits in the immediacy after Hurricane Ian.

Despite the challenges, the Charlotte Community Foundation was also focused on engaging our community. We published a monthly newsletter targeted towards the needs of each group, communicating with our donors, non-profit organizations, and advisors. We worked alongside multiple organizations to assist with their long-term goals, such as facilitation of strategic planning and offering our expertise as fund managers during many capital campaign efforts. In 2022, the Charlotte Community Foundation distributed a record amount of scholarships, totaling over \$200,000. Not only did we award the most amount of scholarships, but our program also grew. Through partnerships with the Isles Yacht Club and the Babcock Ranch Foundation, CCF introduced a whole new focus area of eligibility and skilled trades. These two organizations recognize the importance of a community with a skilled workforce and want to invest in the future of our students and the quality of life for the citizens.



Justin Brand
**Chief Development
Officer**

Development Review

We also reintroduced our Legacy Society. This Society was established to recognize our generous and visionary friends and benefactors who choose the Charlotte Community Foundation to carry out their estate plans. When you join The Legacy Society, you join a group of like-minded people who are committed to supporting the needs of our community. These individuals have worked hard, saved wisely, invested well, and they understand the power of endowment. They know that the assets they leave to CCF will be invested wisely and support good works in our community for generations to come. The Legacy Society provides a way to recognize and thank donors during their lifetimes, and the only requirement to become a member is a simple statement of intent that you plan to leave a gift through CCF in your estate plan. The disclosure of the amount and details of the gift is optional, and members can remain anonymous if they so desire.

As we look ahead, it is clear that the work of the Charlotte Community Foundation is more important now than ever before. We are proud of the growth we have achieved over the past year, and we are committed to continuing to build our capacity and expertise to better serve our community. By positioning the Charlotte Community Foundation as an expert in the community space, we are able to inspire trust in our donors and community partners. With their support, we can create a lasting impact and build a stronger, more resilient Charlotte County for generations to come.

The Charlotte Community Foundation remains committed to expanding our capacity-building efforts for local nonprofits, empowering them to better serve the needs of our community. We will continue to distribute grants and direct assistance to those in need, ensuring that our resources are making a real difference in the lives of individuals and families. By remaining steadfast in our mission, we can build a stronger, more resilient community for all. We encourage our donors and community members to continue their support of CCF's work, as we cannot do this alone. Together, we can make a tangible impact and create a brighter future for our community.

Thank you for your continued support of the Charlotte Community Foundation, and we look forward to working alongside you in the months and years ahead.



CHARLOTTE
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Community Review

In March of 2022, I joined the Charlotte Community Foundation as the Manager of Strategic Partnerships. Brining a vast background of philanthropy and nonprofit experience to the team, it was my goal to position the Foundation in the community as a partner not just for the NPO and our donors, but as more of a convener.

Immediately, the Foundation was asked to assist the Tornado victims in both Charlotte and Lee counties to distribute relief funding to the individuals whom were affected, 126 families. A few short months later, Charlotte County experienced another round of disaster, Hurricane Ian. CCF partnered with many organizations to provide financial resources, but also volunteers to our community. It was the role of the Foundation, along with the help of TEAM Punta Gorda to establish the Volunteer Reception Center and to maintain a centralized intake for all volunteers coming to our community. The Foundation also took lead on coordinating and distributing tangible donations with our partner agencies providing essential relief for families in need.

Through our mission of “Connecting People Who Care With Causes That Matter” the Foundation has been able to bring opportunity to the region by connecting and providing the initial funding for the CAPS program to be explored as a part of the Babcock Ranch Neighborhood School. We have also taken a leadership role as we explore the potential opportunities of our community post disaster, by working with the EIC to conduct a feasibility study on ways to transform our community and to provide opportunity for years to come. Also partnering with the Edison Universe, CCF has provided opportunity for youth, local and internationally, to present their inventions on a large platform. By providing an outlet for young inventors and entrepreneurs to showcase their products we are investing in the future of innovation.

None of this would be possible without the input of our community members as a whole. Understanding this importance is the first step, and by doing so we have partnered with the SWFL Community Foundation as well as the Collier Community Foundation to do a single day community conversation known as “On the Table”. These conversations will allow for all three Foundation’s to provide a regional approach in the way we positively effect change.

To learn more about all of our initiatives, please visit our website.



Amy Huddleston
Director of Strategic
Partnerships

2022
Strategic
Partnerships



Community Initiatives



The Charlotte Community Foundation wants to help build an enduring community of philanthropy that addresses community needs now and in the future. Our goal is to enhance the quality of life for Charlotte County residents by nurturing a community of givers and connecting them to the causes that make a difference.

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Cultural Center

The mission of the Cultural Center was to enhance the educational, recreational, physical, and mental well-being of the citizens of Charlotte County.

CCF is working with Pittsburgh Gateway Corporation and Charlotte County Economic Development to submit a planning grant for a new center for our community.



On the Table

Chatting with neighbors and friends over a meal or cup of coffee is a time-honored tradition. It's also a great way to move our communities forward. As Southwest Florida emerges from the global COVID-19 pandemic and Hurricane Ian, community conversations are more important than ever. This event is scheduled for March 30th, 2023.



Young Edison Challenge

The Edison Challenge is an opportunity for students in grades 9-12 to share their ingenuity through invention. In the process students can build their college resume, win funding for their projects and improve our communities through innovation. The Edison Awards are to be held in Fort Myers Florida, April 19-21, 2023.



Centralized Volunteer Network in Charlotte County

The Charlotte Community Foundation plans to bring a centralized volunteer network to Charlotte County in summer 2023. Expanding the capacity for nonprofits to advertise opportunities while creating a central hub for perspective volunteers.



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