



CollaboratorySM

A photograph of a modern building's exterior at night. The building has large glass windows with the word "collaboratory" printed in large, white, lowercase letters across them. Several palm trees are planted in front of the building, each with a white protective sleeve around its trunk. The ground is paved with grey and white interlocking bricks. The sky is dark blue, and the building's lights are on, creating a warm glow.

**2024
Annual Impact Report**

Dear Valued Friends, Partners & Supporters,

As I reflect on my first full year as President & CEO of Collaboratory, I am writing to share our exciting vision for the organization, as well as the positive impact we have had on our community. Over the past few years, Collaboratory has been a pillar of support for building and growing our coalitions. My vision is that we continue this transformational work while reminding our community that we are still a community foundation. We continue to serve our traditional donors, grow funds, collaborate with professional advisors, and create legacies while creating sustainable and impactful change through our coalition work. We value your commitment to the community, and at Collaboratory, we remain committed to being the honest steward of your charitable giving.

Our motto is simple: when we come together, we can achieve so much more than we can individually. There is a place for everyone at Collaboratory.

*Our work is made possible by our belief in Community Collaboration. We are committed to partnering with generous donors, our valued nonprofits, local businesses, schools, governmental agencies, and other organizations to create a comprehensive network of support. We are committed to impacting some of the **big social challenges** that we face as a community, from education and workforce issues to health and wellness barriers, and beyond.*

Here are just a few ways that we welcome all of you to get involved.

- **Volunteer Your Time:** Share your skills and passion by joining our dedicated team of volunteers.
- **Donate Generously:** Every contribution, big or small, fuels our ability to make a difference.
- **Join our Coalitions:** if you are interested in learning more about how we partner to impact system-level issues across our region, join us.
- **Spread the Word:** Share our story and encourage others to get involved.

*Whether you support our traditional community foundation work or the exciting work in our coalitions, we believe that together, we can create a **thriving Southwest Florida community** where everyone has the opportunity to reach their full potential.*

Thank you for your continued support, and please do not hesitate to reach out if you have any questions or want to learn more about getting involved.



A handwritten signature in black ink that reads "Dawn Belamarich".

Dawn Belamarich
President & CEO
Collaboratory



A handwritten signature in black ink that reads "Gail Markham".

Gail Markham
Chair, Board of Trustees
CPA/Founding Partner,
Markham Norton Mosteller
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John W. Sheppard Award

Presented for selfless dedication to humanity and contributions to Collaboratory



Collaboratory presented Patricia K. Dobbins the prestigious John W. Sheppard Award. Named after a founder of the Southwest Florida Community Foundation, the John W. Sheppard Award is given to outstanding trustees who have given selfless dedication to humanity and made significant contributions to the Foundation. Past recipients include John W. Sheppard, David Lucas, Peter Kleist, Arnold Sarlo, Frank Bireley, Jim Nathan, Sam Galloway, Jr., Tom Smoot, David G. Robinson, Bill Frey, Gene Solomon, Dawn-Marie Driscoll and Jay Brett.

Dobbins is a senior advisor for Collaboratory and has been involved with the foundation since 2009. She has practiced professional nursing for 45 years in a variety of settings. Her experience includes working for the Veteran's Administration; both urban and rural hospital settings; as a nurse educator for 15 years in a public school district and as an entrepreneur owning her own consulting/case management business.

She previously served as the Administrator of the Health Departments in both Hendry and Glades counties. She was appointed to the leadership position after 18 years as the Executive Community Health Nursing Director. Dobbins received her undergraduate degree in Nursing from Northern Illinois University and a master's degree from NOVA University. Following retirement, Dobbins has provided consultative services to small businesses, rural organizations and regional nonprofits. She mentors young people who want to have a career in health, especially first-generation college students.

She serves on numerous local, regional and state boards, committees, task forces and coalitions as an advocate and voice for rural uninsured or underinsured and rural health disparities. She has served in leadership roles for the Florida Association of Public Health Nurses (FAPHN), the Florida Public Health Association (FPHA), and received a Public Health Nursing Leadership Award. She is an alumnus of the University of South Florida Public Health Leadership Institute, the Robert Wood Johnson Executive Nurse Fellows program and the National Rural Health Association Fellows program.

Dobbins has served as an Adjunct Professor at Florida Gulf Coast University and is on the School of Nursing's Advisory Board. She is also a member of the Florida Rural Health Association and serves as a trustee for the Healthy Start Board, Hendry/Glades Mental Health Board and the AHEC Board.

"We are so excited to relaunch the annual presentation of the John W. Sheppard award," said Dr. Dawn Belamarich, president and CEO of Collaboratory. "It is a testament to our commitment to John and his legacy in helping create this foundation. Pat was our natural first choice because of her tireless dedication to serving those who live in underserved areas of Southwest Florida."

"Serving in Hendry and Glades Counties was challenging, yet the most rewarding time in my career," said Dobbins. "The people, the values and the communities are the best in Florida and they will forever have my heart and I will forever advocate for them."



Grantmaking

Nearly

\$12M

granted to support the community

Over

\$1.2M

awarded from 90 scholarship funds

169

scholarships awarded

Provided

\$500,000

of in-kind space usage to the community



Fund Development & Management

18

proposals submitted for funding and/or technical assistance to support community leadership efforts

\$20.4M

in foundation contributions and program support

2

technical assistance grants awarded to build Collaboratory and partner capacity

14

actively pursued ResilientLee Long-Term Recovery and Resilience Plan initiatives with partners focusing on all three coalitions



Community Leadership

FutureMakers Coalition increased cross-sector partner organizations from 150 to

180

The Health & Wellness Coalition engaged

318 partners

The Home Coalition engaged

160 partners

Facilitated 10 Recovery Task Force Meetings, 67 Branch Meetings, 14 Subject Matter Expert Workshops, and 17 County-wide Town Halls, providing more than 6,000 points of community input to the ResilientLee Long Term Recovery & Resilience Plan



Capacity Building

321+

individuals received capacity building and technical assistance

Hosted 5 workshops open to the community to create regional capacity to solve problems together

57

FutureMakers Coalition Partners certified in Mental Health First Aid

FutureMakers supported the City of LaBelle to be selected to join the Municipal Action Cohort: Connecting Adults to Postsecondary and Workforce Success through the National League of Cities allowing 6 partners to gain technical assistance from the National League of Cities and CAEL



Grantmaking

Community foundations distribute grants to nonprofits and other organizations through different processes and types of funds. Competitive grants are typically awarded based on factors such as alignment with the foundation's mission, demonstrated need, and potential for impact. We have aligned our Grantmaking to our community leadership and capacity building strategy.



Scholarships

In 2024, thanks to our scholarship fundholders, we awarded more than \$1.2 million and 279 scholarships to local high school students, undergraduate, graduate students and adult learners from Charlotte, Collier, Glades, Hendry and Lee counties. Over 150 volunteer application reviewers were vital to the process. Some examples of the scholarships available were based on community service, academics, fields of study, athletics, or even students that are attending or attended a particular school.

Hurricane Ian Response

Two Years Later

In response to Hurricane Ian, one of the most devastating natural disasters in history to hit the State of Florida, Collaboratory launched a relief fund to help our area rebuild and support local nonprofits helping individuals with immediate and long-term resources to fuel recovery.

Collaboratory established the SWFL Emergency Relief Fund in partnership with United Way of Lee, Hendry, and Glades Counties. The fund supported Southwest Florida nonprofits across the five-county region, helping individuals and small businesses with the most pressing needs. In addition to the SWFL Emergency Relief Fund, Collaboratory created its long-term Rebuild Southwest Florida Fund. Close to \$900,000 has been raised and is in the process of being granted to organizations focused on creating community resilience through ongoing recovery and rebuilding initiatives. So far, the funds have been granted as follows:

\$13,901

Preliminary Natural Resource Economic Impact Study
Florida Gulf Coast University Regional Economic Research Institute

\$91,659

Sanibel Causeway Tolls, Lee County Board of County Commissioners

\$500,000

Housing Repairs, Habitat for Humanity

\$150,000

Housing Legal Services, Lee County Legal Aid

\$200,000

FutureMakers Navigators Emergency Wraparound Services

\$375,000

Arts & Culture Capital Repairs



Hurricane Milton Response

In preparation for Hurricane Milton, Collaboratory opened the Hurricane Milton Relief Fund to collectively help Southwest Florida rebuild, supporting local nonprofits helping individuals needing immediate and long-term resources to recover.

Southwest Florida was expected to experience 125+ mph winds, intense rainfall and a significant storm surge causing catastrophic destruction, massive power outages, and widespread flooding.

Collaboratory launched the SWFL Emergency Relief Fund in partnership with United Way of Lee, Hendry, and Glades Counties. As an organization serving the five county region, the fund supports Southwest Florida nonprofits helping people and areas of most pressing need. Donors can contribute at collaboratory.org.

“There is only one way through this disaster, and that is working together,” said Dawn Belamarich, president and CEO of Collaboratory. “I am grateful for the spirit of collaboration that we share with the hundreds of nonprofits that are responding tirelessly to the many needs of hundreds of thousands of our fellow residents.”



Fund Development & Management

Community foundations generally maintain a variety of fund types from donor advised funds to agency endowment funds to designated and field-of-interest funds. Community foundations and other charitable organizations may also have relationships with supporting organizations.

Highlight on an Agency Fund



Fostering Success

For over 26 years, Fostering Success has been dedicated to serving children who are or were in foster care by providing opportunities that empower each child to reach their full potential. What began as a small effort to fulfill requests for basic necessities has grown into a leading organization that addresses the educational and social needs of foster children. Today, we proudly support 750 children annually in Southwest Florida.

Our programs are organized into two key pillars: education and enrichment.



Education

- **Ready for Kindergarten:** Connects foster children aged 0-5 with quality early learning centers to prepare them for school.
- **Academic Mentoring:** Offers free tutoring to students aged 5-18 with open or closed dependency court cases, ensuring consistent academic support.
- **Scholarships:** Provides financial assistance to high school seniors who are or were in the foster care system, enabling them to pursue higher education.

Enrichment

- **Project Enrichment:** Supplies essential items such as diapers, cribs, beds, clothing, school supplies, and uniforms. It also enables foster children to participate in activities like summer camps, afterschool programs, sports, music, arts, theater, and dance—fostering skill development, friendship, and fun.
- **Thriving After Care:** Supports young adults aged 18-23 transitioning out of the foster care system by teaching vital life skills such as cooking, financial literacy, resume building, job applications, securing housing, and pursuing advanced education.

At Fostering Success, we understand that addressing the needs of the whole child is critical. Emotional healing and social growth are essential prerequisites for achievement.

Our impact is evident. Last year, 100 percent of the children in our programs graduated from high school, significantly exceeding the national graduation rate of 50 percent.



Helping to remember Ms. Liz



“The service, communication, passion, care, and professionalism of Collaboratory has provided a seamless experience. Gina and the team have consistently answered our questions to help us reach our goals. Through Collaboratory, we have kept our beloved family member’s memory alive via the Ms. Liz Cosmetology Scholarship, which has in turn helped aspiring cosmetology students achieve their dreams. We highly recommend it to anyone and everyone hoping to make a difference in our community. These people are great!”

-The Family of Elizabeth Barnebee

The HOPE Foundation of SW Florida Scholarship in memory of Fredrick Morgan

Fredrick Morgan II, born and raised in Fort Myers, was truly an asset to the Dunbar community as well as Lee County. As a leader and advocate in education, and as he served as Director of the HOPE Scholarship at Edison Community College, which is now known as Florida Southwestern State College, Fred was able to positively touch and affect the lives of many students. He was able to help provide hundreds of scholarships to students from Lee, Collier, Hendry, Glades, and Charlotte counties.



Fredrick left a strong legacy of family, faith, community, and education. His family wished to continue that legacy through the creation of the HOPE Foundation of SW Florida Scholarship at Collaboratory. Through this scholarship, the memory of Fredrick Dunbar Morgan II will live on.

Professional Advisors

We partner with professional advisors to support the philanthropic legacies their clients wish to establish. We were thrilled to welcome the return of the annual Professional Advisor Appreciation Dinner. It was a memorable evening of reconnecting, networking and updating our partners on the latest developments at Collaboratory. SEI, our investment manager, graciously sponsored the event and shared insights into how they manage funds for Collaboratory.

During the evening, we had the honor of recognizing two of our most dedicated advisor partners: Lowell Schoenfeld and A. Scott White. Their unwavering commitment to their clients, dedication to educating others, and support of working with community foundations like Collaboratory truly stand out.



Lowell S. Schoenfeld

Estate Attorney and Partner at Green Schoenfeld & Kyle LLP.

Lowell provides legal expertise and service to clients in the practice areas of estate planning and administration, corporate and business planning matters, and wealth and asset preservation and protection. Lowell is board-certified by The Florida Bar as an expert in wills, trusts, and estates. He has earned an AV® Preeminent™ Peer Review

Rating by Martindale-Hubbell®, the highest recognition possible in the legal industry. Lowell is a member of The Florida Bar and Lee County and American Bar Associations. Lowell has been a resident of Lee County since 1976 and is past president and a current member of the Lee County Estate Planning Council and The Planned Giving Council of Lee County, Inc.



A. Scott White, CFP

Uhler Vertich White Advisors

Scott helps families with significant net worth develop estate and financial plans. He is a board member of Hope Clubhouse of Southwest Florida, a member of the board for the United Way of Lee County, and an Emeritus Board member at Collaboratory. Scott is also the past treasurer and an active member of the Fort Myers Rotary Club. The American

Red Cross of Lee County honored Scott with its 2009 Legacy Award for his contributions in promoting and facilitating charitable giving in the Lee County community.

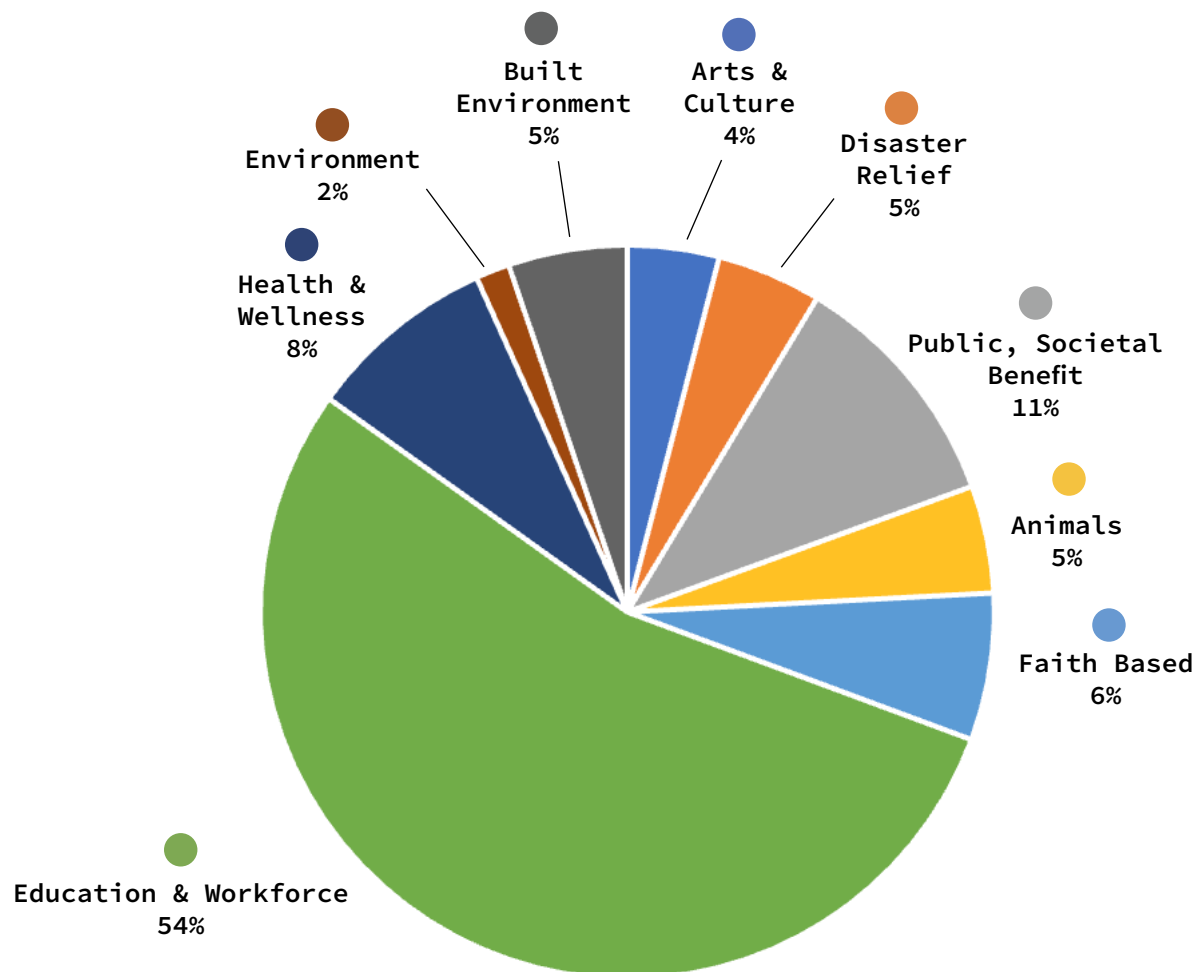
Collaboratory deeply values our relationship with professional advisors and is committed to working alongside them as they guide their clients in charitable giving.

Audited Financial Statements and Grants

STATEMENT OF ACTIVITIES REVENUES AND OTHER SUPPORT	June 30, 2024	June 30, 2023
Contributions	\$15,037,815	\$17,020,955
Collaboratory and Community Programs Support	\$5,317,994	\$2,642,047
Miscellaneous Income	\$183,530	\$417,158
Net Investment Income	\$15,562,950	\$10,577,189
Total Revenue and Other Support	\$36,102,289	\$30,657,349
EXPENSES		
Distributions	\$6,337,736	\$9,142,775
Scholarships	\$1,091,847	\$1,139,859
Programs	\$8,778,245	\$3,985,932
Administrative	\$1,134,668	\$1,698,467
Development	\$305,487	\$1,091,873
Total Expenses	\$17,647,983	\$17,058,906
Payments and changes in value of split interest agreements and interest in remainder and lead trusts	\$7,419,123	\$2,718,776
Change in Net Assets	\$11,035,183	\$16,317,219
Net Assets, Beginning of Year	\$145,023,814	\$128,706,595
Net Assets, End of Year	\$156,058,997	\$145,023,814

STATEMENT OF FINANCIAL POSITION ASSETS	June 30, 2024	June 30, 2023
Cash and Equivalents	\$1,923,244	\$3,555,916
Contributions and Other Receivables, Net	\$693,439	\$935,225
Prepaid Expenses	\$153,470	\$119,513
Impact Investing Loans Receivable	\$1,193,803	\$1,060,375
Loan Receivable	-	\$6,651,000
Investments	\$128,604,118	\$117,415,245
Investments Held in Charitable Remainder Trust	\$1,334,592	\$1,309,668
Split Interest Agreements and Remainder Interests	\$20,254,718	\$27,707,822
Property and Equipment Net of Depreciation	\$9,613,585	\$9,936,130
Other Assets	\$175,740	\$176,765
Total Assets	\$163,946,709	\$168,867,659
LIABILITIES & NET ASSETS		
Accounts Payable and Accrued Expenses	\$340,520	\$315,317
Grants Payable	\$2,282,303	\$2,087,269
Funds Held as Agency Endowments	\$2,805,583	\$2,639,537
Deferred Revenue	\$873,659	\$414,358
Annuity Obligations	\$251,055	\$277,696
Charitable Remainder Trust Obligations	\$1,334,592	\$1,309,668
Loans Payable	-	\$16,800,000
Net Assets	\$156,058,997	\$145,023,814
Total Liabilities and Net Assets	\$163,946,709	\$168,867,659
<p>"The consolidated financial statements of Collaboratory and supporting organizations for the years ended June 30, 2023 and 2024 have been audited by Moss Adams LLP.</p> <p>Visit https://collaboratory.org/more/financials-and-investments/ for current financial information.</p> <p>Federal Tax ID #59-6580974. Confirmed in Compliance with National Standards for U.S. Community Foundations."</p>		

Distributions by Community Impact Area



Collaboratory adheres to the highest standards to operate in the public view and public interest. Our financials are available for review upon request. You may also review the last three years of our financial statements, tax documents, including Internal Revenue Service Form 990 and Form 990-T (if applicable) at collaboratory.org.



Community Leadership

Community foundations often act as conveners, bringing together diverse stakeholders to address community issues. They may organize forums, workshops, or other events that foster collaboration and collective problem solving. As we collectively drive toward 2040, our Community Leadership role is to resource, engage, and coordinate regional coalitions aligned around shared goals to change regional outcomes given that no single entity can solve a big social problem on its own.

Power of Partnerships

At the Power of Partnerships event, leaders and changemakers came together to share ideas on how to build a stronger, more connected region. The event underscored the passionate commitment of individuals and organizations working toward a flourishing community and highlighted Collaboratory's role in supporting and amplifying their efforts.

As a community foundation, Collaboratory remains dedicated to addressing immediate needs while also taking a long-term, proactive approach to problem-solving. The conversation emphasized the importance of upstream solutions—tackling challenges at their source rather than just responding to symptoms. By convening diverse community stakeholders and facilitating collective action, Collaboratory is driving real, systemic change.



This commitment is evident in the expansion of regional coalitions, with a focus on housing, health and wellness, and the early development of two additional initiatives centered on Southwest Florida's built and natural environments. The discussion reinforced a core belief: sustainable solutions require collaboration, shared vision, and the power of partnerships to generate resources, align efforts, and create lasting impact.

As Collaboratory continues its work toward solving Southwest Florida's most pressing challenges by 2040, the event served as a powerful reminder that transformation happens when a community comes together to take bold action.



co•a•li•tion: an alliance for combined action

Recognizing that big social problems cannot be solved by a single organization, Collaboratory launched 3 cross-sector coalitions to improve regional outcomes and achieve the goals of our donors by making a positive impact in our communities. FutureMakers Coalition (established in 2015), which focuses on the education and workforce system, is the prototype for two new coalitions to make sure everyone in Southwest Florida can afford housing and enjoy good health.



FutureMakers
Coalition



Health & Wellness
Coalition



Home
Coalition



A Higher Degree of Human & Economic Development

In 2024, FutureMakers Coalition grew exponentially; in partnerships, diversified programming and funding streams, and outcomes. Over 180 organizations and 260 individuals are now recognized FutureMakers partners, and participation among regional employers increased 30% since 2023. A total of 13 new project teams were created to address workforce development goals and strategies, while five grants were awarded and two new corporate sponsors invested in FutureMakers Coalition.

To date, \$2.2 million dollars have been distributed through the Equitable Jobs Pipeline to support wrap around services that enable adults who need to reconnect with education and training to get into good jobs here in Southwest Florida. In the same time frame, \$5.78 million was committed to training partners and employers.

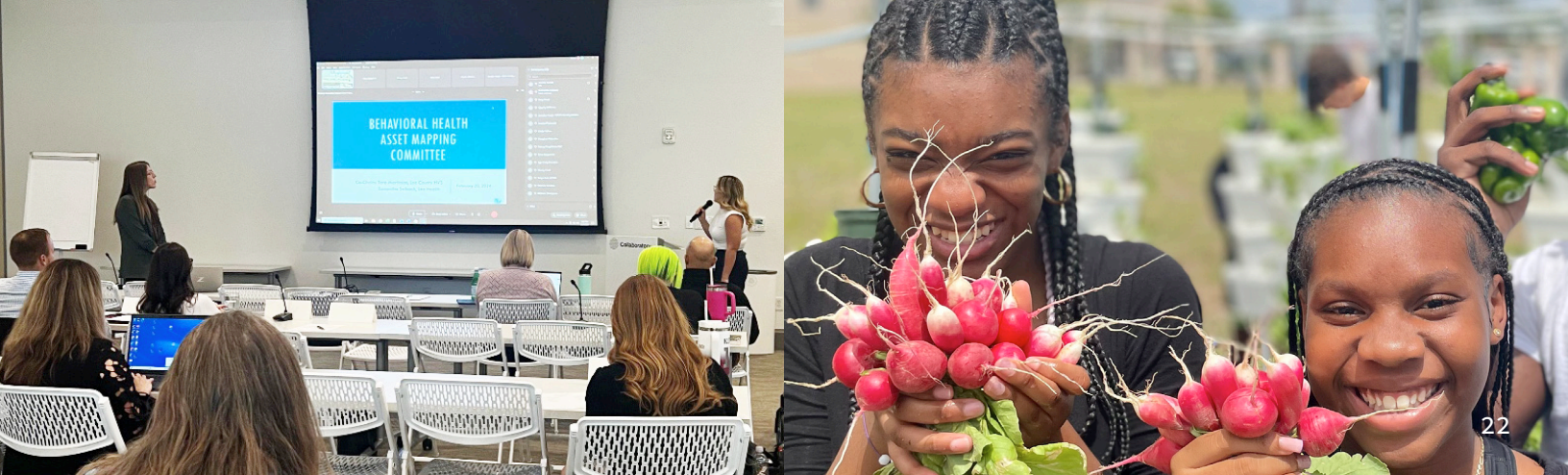




Building a Healthier Southwest Florida

The Health and Wellness Coalition achieved significant milestones in advancing our shared goal of being among one of the healthiest communities in the nation by exceeding the 90th percentile for health indicators (length of life and quality of life) by 2040.

The coalition engaged over 300 partners, integrating two major health initiatives, Healthy Lee, and Blue Zones Project, to strengthen its impact. A guiding team was established, supported by four new coordinators hired in January, to provide backbone support and foster collaboration. Four regional action teams now drive outcomes in active living, behavioral health, food access and nutrition, and health systems. Additionally, a baseline partnership health report showed that 92% of respondents identify as partners and believe our collective efforts will significantly improve regional health outcomes.



Making Affordable Housing Accessible for All

This year, the Home Coalition made remarkable strides in advancing the shared goal that 80% of people in Southwest Florida will have access to housing and transportation that costs less than 45% of their income by 2040. Engaging over 160 individuals from 120+ organizations, the Home Coalition established a Guiding Team, three Regional Action Teams, and nine project teams, fostering collaboration committed to transformative change.

The inaugural Home Coalition Partnership Health Report revealed that 89% of respondents believe our collective efforts can significantly improve regional housing outcomes. With support from Bank of America and Lake Michigan Credit Union, we commissioned a Regional Housing Study to identify strategies for financing and developing more attainable housing; its recommendations, expected in January 2025, will guide future action.





Capacity Building

Community foundations often provide training and resources to strengthen the capacity of local nonprofit organizations. They may offer workshops on topics such as fundraising, board development, and strategic planning, as well as provide access to research, data, and best practices to help nonprofits improve their effectiveness and sustainability. In addition to the coalition onboarding program we provide, we are offering training and resources to regional partner organizations to strengthen our collective ability to solve problems together.

Workshops

Grant Writing Workshop

JANUARY 2024

Collaboratory welcomed community partners for an engaging grant writing workshop focused on strengthening nonprofit program development, proposal writing, and capacity building. Led by Dr. Madeleine Kahn, the session provided valuable insights and strategies to enhance funding opportunities and drive greater impact.



Data Best Practices Workshop

MARCH 2024

We partnered with Florida Gulf Coast University's RERI and SFLI to host a free workshop focused on using data effectively to drive impact. Participants gained valuable insights into data collection, maintenance, analysis, and reporting, learning best practices for integrating data-driven approaches into decision-making and accountability.



The Power of Clarity: Logic Models for Nonprofits

JUNE 2024

This workshop, led by Rachel Walter, was designed to help nonprofit organizations strengthen their impact by effectively communicating and measuring the change they create. Attendees explored strategies to build stronger programs, enhance accountability, and achieve meaningful outcomes.

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collaboratory

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