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# Verobeach

FEBRUARY 2024

*Magazine*<sup>®</sup>



## HOW SWEDE IT IS!

Mikael & Kristina Pernfors  
blend Scandinavian minimalism  
with some bold design choices



PHILANTHROPY

# Time for a Tune-Up?

MAKE THE MOST OF YOUR GIVING WITH A PERIODIC REVIEW



BY JEFFREY R. PICKERING

**W**hen was the last time you had a “tune-up”?

When I was young, my father worked as a mechanic and eventually managed a group of automotive repair shops in the Orlando area. He did this for almost 30 years before changing careers to work in nuclear medicine.

For many of his customers, either at the repair shop or at the hospital, the annual tune-up was approached with some level of temerity, as people were concerned that what was scheduled as a simple oil change and tire rotation, or diagnostic test, would turn into something worse and much more expensive.

While there were at least a dozen other garages between our home and my dad’s main store, and plenty of area hospitals and imaging centers to choose from, over the years hundreds of our neighbors, friends, and acquaintances would drive from all over the Orlando area just to have their tune-up with my dad. They did



Cleveland Clinic Indian River Hospital has used money from local donors to create the cancer and stroke centers.

this for one reason that I can tell: trust.

Looking back on the prior year, I started thinking how important a regular tune-up is when it comes to philanthropy and the charitable organizations in our community.

When was the last time your philanthropy had a tune-up?

In my job as president and CEO of Indian River Community Foundation, I have the privilege of participating in regular philanthropic tune-ups for many of our clients. They are among the most generous people in our community and are motivated primarily by a desire to make a difference by giving to

charities that reflect their personal values or beliefs or that focus on a need that is important to them.

Most of IRCF's clients use a donor-advised fund as a simple vehicle to organize and execute their charitable giving. Think of it as a combination of a charitable checkbook and savings account, depending on how it is used. While the timing and methods of annual donations to their donor-advised funds are often made in ways that maximize tax benefits, the reasons for our clients' giving come mostly from the heart. This fact becomes particularly clear when we consider community needs data and

the indicators of progress associated with the causes they give to.

Each year, we examine these priorities through a fund review, our version of a philanthropic tune-up, to ensure that our clients are clear on their giving priorities and focused on the impact they intend to make. The following examples illustrate the benefits of a regular assessment of your giving interests and an alignment with the gifts you make.

## HEALTH

Step onto the campus of Cleveland Clinic Indian River Hospital and it is easy to believe that families

## INDIAN RIVER INSIGHTS



Paths to addressing mental health in local children are improving with new programs and services.

with the names “Scully” and “Welsh” value high-quality health care. Their names are on the buildings, joined by dozens more local donors who are honored on plaques throughout the facility. With our county exhibiting some of Florida’s highest rates of death by cancer, heart disease, and stroke when compared to the state’s average, their philanthropic investments in our local hospital’s cancer and stroke centers are essential in preventing unnecessary suffering among our neighbors, many of whom live in poverty or just one paycheck away from it.

IRCF clients have stepped up in a big way to address a variety

*What’s your **Love** language?*



Each week, we provide meals to 250,000 children, seniors, families and veterans on the Treasure Coast. You can help fill plates and hearts.



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**In our community, 16 percent of working people are still living below the poverty level.**

of local health needs. Mental health is among the most challenging, with a hospitalization rate among teens and young adults for anxiety or depressive disorders more than twice Florida's average, and a suicide rate 50 percent higher than the state average.

During her life, Alma Lee Loy Legacy Society-member Ellie McCabe dedicated much of her philanthropy to addressing this community need, as have current clients Tommy and Simonetta Steyer and Anne Lanier. Each was motivated by a personal experience of losing a son or daughter, and all have invested in organizations like the Mental Health Collaborative and its McCabe Connections Center and the Mental Health Association to strengthen the community's system of mental health care. As a result, we are seeing

improvements in access to behavioral health services and a reduction in some of the most adverse outcomes.

**EDUCATION AND THE ARTS**

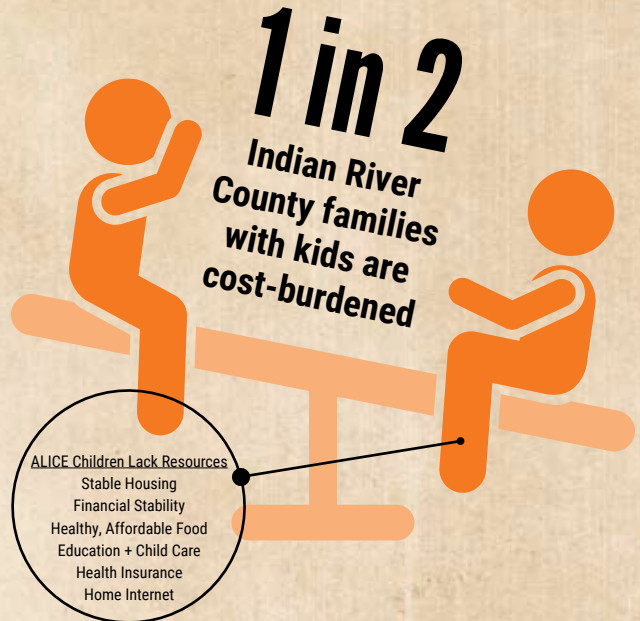
"See you in the Waxlax." It is a common phrase uttered by parents and students at Saint Edward's School. The Waxlax Center for the Performing Arts is an 800-seat theater named for local philanthropist Lorne Waxlax; it has become a hub for all types of educational activities. From student performances and graduations to speaker events, the Waxlax is a thriving example of a philanthropic investment that reflects the donor's values and desire to make an impact in our community.

The same can be said for the Schumann and Schwerin families in relation to education and the arts, with a gallery and children's Art Zone,



The VBMA Art Zone is funded by generous Vero Beach benefactors.

**DID YOU KNOW?**



Half of all children in Florida live below the ALICE\* threshold – the income needed for household survival. That's more than 4 million kids and their families who cannot make ends meet.

**When you give to United Way, you're being a superhero for children.**

*\*ALICE stands for Asset Limited, Income Constrained, Employed. The household survival budget for an individual living in Indian River County is \$27,516.*

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United Way of Indian River County

**UNITED WAY FOUNDATION OF INDIAN RIVER COUNTY**

# INDIAN RIVER INSIGHTS

respectively, at the Vero Beach Museum of Art named for them. Every time I visit, either on my own or with my children, I learn something and I know they do too. Both of these places are examples of permanent investments in the belief that education through the arts can make a difference.

## ECONOMIC OPPORTUNITY

In our community, 16 percent of working people are still living below the poverty level. Another 35 percent live just one paycheck away from it. United Against Poverty works to inspire and empower people living in poverty to lift themselves and their families to economic self-sufficiency. For years, IRCF and our clients have awarded grants to the organization for STEP, the Success Training Employment Program.

Common tropes might suggest that Indian River County's wealthy do not care about this population, but IRCF's clients have demonstrated a different

reality. Paul Becker was the honorary chairman of a campaign that raised more than \$5 million to build a new UP Center, and dozens of other clients, including Bill Frick, Pat Hemingway Hall, Jennifer Watson, and Sandy and Randy Rolf, have contributed to the more than \$2 million IRCF has invested in the organization's mission over time. They know that getting and maintaining a job is hard, and they are a testament to a belief that our most vulnerable neighbors don't have to do it alone.

## HOUSING

Ask Chuck Cunningham, board president of the Hope for Families Center, why he volunteers for the organization, and he gets emotional.

"Last year, there were more than 145 children without a home in Indian River County," he says. "Some of them are in families that are on our waiting list, and because we are full, will spend



STEVEN MARTINE

Above: The Hope for Families Center houses the homeless. Below: HFC executive director Marty Mercado and board president Chuck Cunningham lead the organization.



STEVEN MARTINE



**“Last year, there were more than 145 children without a home in Indian River County.”**

— CHUCK CUNNINGHAM

## INDIAN RIVER INSIGHTS



Donors have already given more than \$4 million toward the expansion of HFC to help homeless families.

the night tonight and likely many more sleeping on a couch, in a car, or outside. We must do better.”

To him, and to several other IRCF clients, “doing better” means supporting a \$5.5 million expansion effort. Clients including the late Bob Theis, Bob and Emilie Burr, and Dick Sameth are part of a growing list of donors who have already contributed more than \$4 million toward this goal. When complete, this expansion will enable the organization to double the number of families it serves in a year.

Donors are not the only ones who can benefit from a philanthropic tune-up. Charities can make this a meaningful exercise to ensure that their mission and operations are aligned, and that



### BUSINESS LEADER BUILD 2024

leaders working together

Saturday, March 16  
7:30am - 12noon

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- Bill Penney, *President & CEO*  
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their organization's public image is optimized for the greatest visibility and awareness. Here's why I think this is so important.

Last year's contributions, earned income, government grants, and investment income for Indian River County charities, including health care organizations, equaled more than \$380 million. During this same time, donors gave more than \$110 million to local charities. Most of these donations went to the 175 local 501(c)(3) nonprofit organizations listed on IRCF's online Nonprofit Search that earned more than \$50,000 in income and filed an IRS Form 990 tax return. Indian River

County charities collected contributions at a rate more than twice the national average.

While we are fortunate to live in such a generous community, today's donors are looking for much more to justify the investments they are making in local charities. Many turn to the online Nonprofit Search to find information to help them make more effective giving decisions. Indian River County charities that want to increase the likelihood that they won't be skipped over, especially at the year's end,

should maintain their GuideStar profile at the "platinum" level, which demonstrates the highest standards for transparency and accountability.

If it's been a while since your philanthropy or the charitable organization you are involved

with has had a tune-up, I encourage you to make the time to get one soon. It will give you peace of mind and confidence that valuable resources are being used effectively and driving results that make our community better for all. ✨



Financial information on local nonprofits is readily available online.

MUSIC DIRECTOR  
David Amado  
**The Wild West**  
VERO BEACH: JANUARY 11  
STUART: JANUARY 12

GUEST ARTIST  
Terrence Wilson  
**Paris Jazz**  
VERO BEACH: FEBRUARY 8  
STUART: FEBRUARY 9

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Siwoo Kim  
**Latin Passions**  
VERO BEACH: MARCH 21  
STUART: MARCH 22

GUEST ARTIST  
Ashley Garritson  
**The Classics**  
VERO BEACH: APRIL 11  
STUART: APRIL 12