



Leadership.  
Generosity.  
Impact.

Together,  
we invested  
powerfully in our  
community.



# A Year of Giving

We exist to strengthen Greater Miami. When the going got tough this year, we stood together and invested powerfully in our community's recovery. We demonstrated the impact of united, strategic, equity-minded philanthropy. This is why we are thankful to be growing the charitable muscle our community needs, for today and for our future.

**The  
Miami  
Foundation**  
For A Greater Miami

# Impact at a glance

**\$78 million**

Granted from our Foundation to charitable causes in 2020

**+\$18 million on Give Miami Day**

**\$69 million**

New gifts and planned/estate promises made to the Foundation in 2020

**\$367 million**

In total assets - our community's philanthropic power source - made possible by our fundholders

**\$478 million**

Granted from our charitable funds since our inception in 1967 to strengthen Greater Miami

**1,034**

Active charitable funds at The Miami Foundation strengthening our community

**101**

Community supporters who have given, donated, or pledged \$1 million or more

\*Please note the 2020 figures are still preliminary

# We stood together

In a city with so much magic brewing, many do not realize that more than half of Miami-Dade is a paycheck or two away from risk. 2020 shined a light on inequities and gave us an opportunity to rethink "business as usual". This year pushed us to grapple with the impacts of food insecurity. The digital divide. Systemic racism. Nonprofit adaptability. It was a year of bold solutions, serious collaborations, and hard conversations. As we turn the page on 2020, we truly are stronger than when we began. Everything we accomplished was possible because of you, our donors and partners. Now and forever, we stand together to strengthen Miami for ALL.



# COVID-19: Nonprofit Recovery

In the face of serious hardship, our fundholders demonstrated unshakeable generosity and donated millions of dollars to nonprofits standing at the frontlines of Miami's recovery. We leveraged our resources to unlock additional funds. In partnership with Miami-Dade County, we ran the largest nonprofit recovery effort in our history and helped local organizations provide their critical support to our community. Together, we funded over 350,000 meals. Housing support. Internet access. Education. Job training. Relief for those facing domestic violence, mental health, and substance abuse strains. Across every issue area, we kept Miami strong.

Over \$15 million in recovery grants to more than 500 nonprofits.

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*"This grant award made it possible to feed families, in particular the families of low income, immigrants, refugees and migrants. These families were already struggling before COVID-19 and since the pandemic our families' situations have been made even more difficult. [...] This grant made it possible to alleviate an emergent need for over 170 families."*

**- Three Virtues Organization**

# Every dollar multiplied



By buying Personal Protective Equipment (PPE) in bulk for 90 nonprofits in need, we accessed deep discounts and resources unavailable in smaller orders. Every investment made from our fund was leveraged for increased impact.

Thank you to the lead investors who enabled our COVID-19 response.



THE JORGE M. PÉREZ FAMILY FOUNDATION



Richard A. Berkowitz  
Philanthropic Fund



KNIGHT FOUNDATION



HeliOS  
Education Foundation



HEALTH FOUNDATION of south florida



A Member of Trinity Health



JPMORGAN CHASE & CO.



Anonymous

Ortega Family Fund

David E. Carney

Hudson Randolph Fund

Anonymous

Wollberg Family Fund

Michael Comras and Daniela Swaebe

Catalyst Fund,  
Mr. and Mrs. Richard C. Shipley

# Racial Equity

As our community grieved the systemic impacts of racism, we launched the Racial Equity Fund to fuel organizations and leaders with lived experience, seeing increased momentum in the fight for racial equity.

What began with \$100,000 in seed funding from our Foundation has grown to over \$1.5 million in support. We look forward to awarding our third round of grants in early 2021.

This work led us to consider all of our efforts from an equity lens, from Give Miami Day to our Annual Grants program.

## FACEBOOK

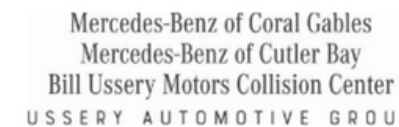
recently invested \$1 million to advance racial equity and justice in Miami through our Racial Equity Fund.



Loretta Scippio-Whittle,  
Racial Equity Fund Awardee

Mitchell Wolfson Sr.  
Foundation

Anonymous



Robin & H Jordan Weitz



Gloria Romero  
Roses



**WELLS FARGO**

Chris Adamo and Randi  
Wolfson Adamo



**\$18.2 Million Raised**  
**33,336 Donors**  
**55,342 Donations**  
**1,047 Volunteers**  
**49,323 Hours Pledged**

# Give Miami Day

Bold generosity for 24-hours straight.

We led our region's largest-ever day of giving, raising \$18.2 million, with more than 50,000 donations, and supporting over 850 nonprofits.

This year, considering the additional strain on nonprofits, we raised an unprecedented \$1 million bonus pool to incentivize generosity and participation.

# Give Miami Day

Made possible with philanthropic leadership from:



William R. Watts  
Foundation



Mitchell Wolfson Sr.  
Foundation

Richard A. Berkowitz  
Philanthropic Fund



Helena Rubenstein  
Philanthropic Fund

Anonymous



The Eilah and Ben Beavers  
Gift Fund

Morgan Stanley  
PRIVATE WEALTH MANAGEMENT



Samara  
Fund

Anonymous  
in honor of Julie Neitzel, Vice Chair of The Miami  
Foundation's Board of Trustees



The Miami Foundation  
**GiveMiami** 2020  
day



## #GiveMiamiDay

# Census 2020

1.2  
million

Over 1.2 million households reached with critical Census messaging

\$630  
thousand

\$630,000 invested in education and outreach. 29 local nonprofits directly assisted 106,000 households



Community Justice Project at Salon Juste: Census 2020 & Racial Justice.

The Miami Foundation was proud to serve as a backbone for our region's nonpartisan Census 2020 effort.

Ultimately, the 99% response rate in Florida will translate into tens of millions of dollars for our hospitals, Title-1 schools, road repairs, and emergency response efforts.

We worked tirelessly with a consortium of partners to educate and reach all corners of Greater Miami.

MIAMI-DADE  
COUNTS  
CENSUS 2020



# Census 2020

The Miami-Dade Counts 2020 collaborative came together to collectively champion the Census 2020 effort, so critical to the future of our community.

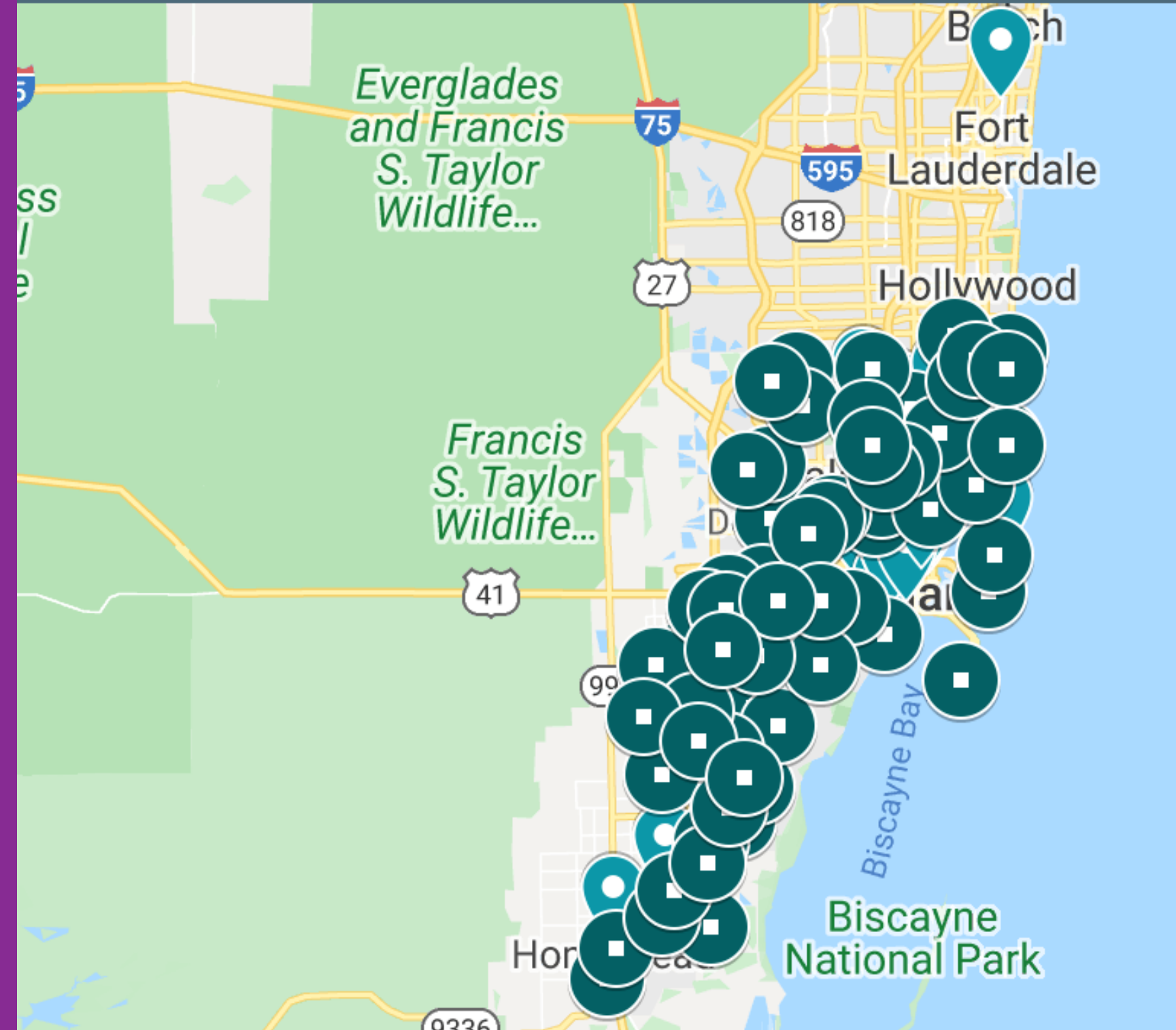


WITH SUPPORT FROM:



## Miami-Dade Counts 2020 | Efforts Map

This map was created by a user. [Learn how to create your own.](#)



By coordinating efforts, we ensured that all neighborhoods were reached, minimizing duplication, and maximizing the impact of our dollars.

# Our Miami: the People's Forums

We hosted 10 forums focused on Miami-Dade local elections, reaching an audience of 75,000, educating, presenting and sensitizing to the major challenges of our region and allowing for all views and candidates to be presented and visible.

The Miami Foundation invites you to

## Our Miami: The People's Forums Miami-Dade County Mayor



## Local elections matter

Together, we engaged tens of thousands of Miami-Dade residents to become informed, engaged, and election-ready.



## Our Miami: The People's Forums County Commission District 7



Thursday, July 16, 2020 • 5 — 6:30 p.m.

Register here  
[MiamiFoundation.org/OurMiamiForums](https://MiamiFoundation.org/OurMiamiForums)  
Sign language interpreter available





KIPP Miami

### **The Jorge M. Pérez Family Foundation**

Since 2015 the Pérez family has awarded 144 grants and invested \$19 million to support the arts, youth education, economic equality and to positively impact local nonprofit organizations in Miami. The Miami Foundation works closely and continuously with the Pérez family to develop a framework for grant-making to address these areas of interest.

# Visionary Philanthropy

We worked in deep partnership with philanthropists to build powerful legacies of impact for Greater Miami. These philanthropists leveraged decades of insights from our Foundation and expertise from our team to design and implement grant programs that move the needle on issues that matter to them and to the future of our region.



Young Musicians Unite

### **Music Education for ALL \$5 million committed in 2020**

With leadership from Miami philanthropist Daniel Lewis, we are working to bring music education to all youth in Miami. This includes funding a music alliance between six nonprofits who are collaborating to reach every child in Miami Gardens. This effort has grown through additional support from ELMA Philanthropies.

# Legacy Society



## **Dara Schoenwald and Dave Doebler**

When COVID-19 began ravaging the U.S., Dara Schoenwald and Dave Doebler decided that now was the time to plan for the future. As longtime Foundation donors and supporters, Dara and Dave knew that legacy planning options were available to them, but hadn't seen the urgency in making any decisions.

Once the reality of the pandemic set in, they met with the Foundation team to determine the best vehicles for furthering their charitable passion: clean water and marine health.

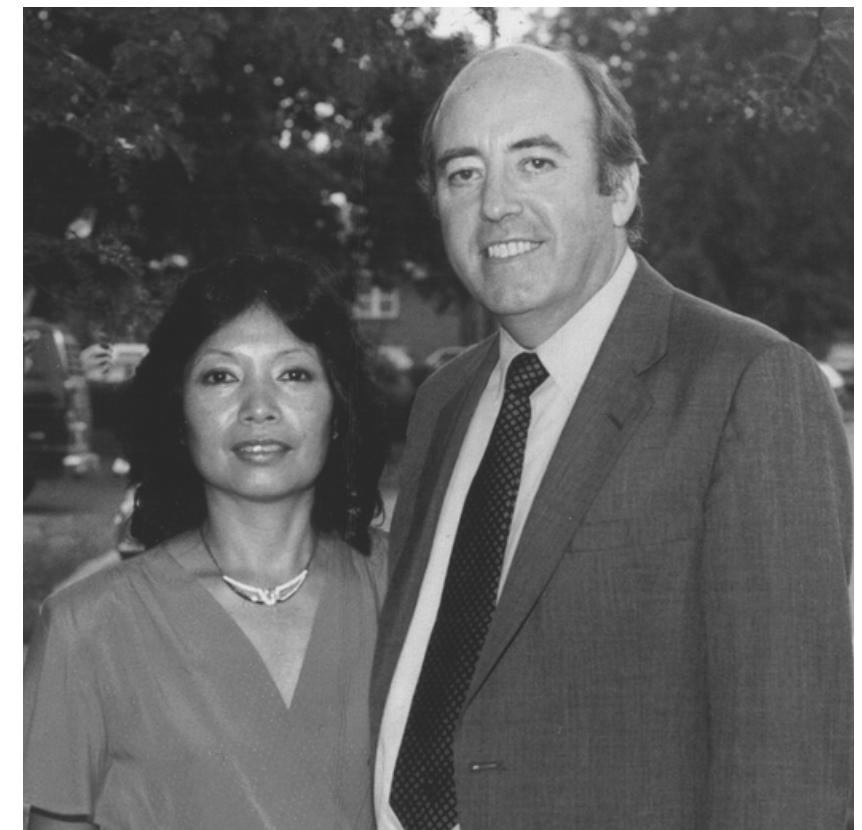
Inspired by their own beach and waterway cleanup efforts, the couple founded the nonprofit VolunteerCleanup.org as a platform for locals to organize and share cleanup events. They decided to create a Field of Interest Fund that will serve as a beneficiary of their estate to support marine sustainability initiatives long after they have passed. When asked why they chose to trust the Foundation to carry out their estate plans, Dara and Dave pointed to our leadership on issues like sea-level rise and the ability to preserve the legacy they desire.

## **Jocelyn Watkins**

When it comes to philanthropy for Jocelyn "Jo" Watkins, people have always come first. Throughout decades of charitable giving, Jo and her late husband, John, sought to make a measurable impact by giving to organizations that provide immediate support for basic human needs and improve quality of life.

Jo knew that true impact could only be made by building capacity for the future, and so they decided to partner with The Miami Foundation to ensure her legacy of giving will continue.

Jo established an endowed Fund at the Foundation benefiting the New Life Family Center in perpetuity, and the J2 Watkins Memorial Fund, supporting other pressing community needs. In recognition of their community work, the Foundation honored John and Jo at Philanthropy Miami's 2020 Donor Next Door event.





# Scholarships and corporate giving

We work with partners to help them amplify their impact in Greater Miami. From designing and managing scholarship programs to tailoring corporate giving efforts that help more students gain access to higher education. Increasing young people's educational attainment is a critical factor for Greater Miami's growth and strength. Thanks to our generous donors, we have helped countless students develop and contribute their passions and talents to our community.

## College Access Program

CAP, Inc. provides scholarships to Miami-Dade County Public High School graduates who have exhausted all avenues of financial assistance (federal, state and institutional), but still have significant unmet needs to attend the college of their choice.

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**316 scholarships offered in 2020**  
**193 educational equity focused scholarships awarded**

"Scholarship programs like this CAP grant are vital because they encourage and provide opportunities for students to attend the college of their choice, regardless of their economic circumstances."

Alberto Carvalho, Miami-Dade County Public Schools Superintendent.



# Board of Trustees

Community leaders and distinguished executives lead The Miami Foundation to strengthen our community. In the face of COVID-19 and tremendous needs, our Trustees continued meeting virtually, helping us ramp up increased supports for Greater Miami.



**Richard A. Berkowitz JD CPA**  
**Board Chair**  
Founding and Executive  
Chairman, Berkowitz Pollack  
Brant



**Julie Neitzel**  
**Vice Chair/Investment Chair**  
Partner,  
WE Family Offices



**Ben Beavers**  
**Treasurer**  
Chairman and Founder,  
Gresham Partners, LLC



**Jose A. Hernandez Solaun**  
**Secretary/Programs Chair**  
President,  
The Easton Group



**Gary Ressler**  
**Development Chair**  
Principal, The Tilia  
Companies



**Alison Miller**  
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Shareholder, Stearns  
Weaver Miller



**Mark Scott JD LLM**  
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**Sheldon Anderson**  
Former President and  
CEO, Southeast Region of  
Northern Trust



**Yolanda Berkowitz**  
Founder, Friends of Miami  
Animals Foundation

# Board of Trustees



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BACARDI Rum



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Community Advocate,  
former Editor in Chief,  
John Wiley and Sons, Inc.



**Avra Jaun**  
CEO, The Vagabond  
Group, LLC



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Stanley Private Wealth  
Management



**Abigail Watts Fitzgerald**  
Owner, Watts-Fitzgerald  
Law, PLLC

# True Leadership



## Joe Fernandez

Interim President and CEO

Our institution is blessed with a highly engaged leadership base of Trustees who go above and beyond the call of duty to strengthen our Foundation and community at large. When our previous CEO announced his transition, a Trustee who had served for six years (Jan. 2014 - Dec. 2019) stepped up to serve as an interim President and CEO during the transition, while continuing his full time responsibilities as Regional President of BNY Mellon Wealth Management. Joe Fernandez, who now serves as Managing Director and Senior Advisor at Fieldpoint Private, stood at the helm of our Foundation as our community absorbed the initial pains of COVID-19, launching our community recovery fund, and shifting our operations fully on-line. Joe, who was affectionally called “dad” by many of the staff members, made sure we didn’t miss a beat and also chaired the search committee that unanimously selected our new President and CEO, Rebecca Fishman Lipsey.

## CEO Search Committee

Thank you to the robust President and CEO Search Committee comprised of community leaders and advocates who conducted an intensive eight-month search and interview process to hire our Foundation’s fourth President and CEO.

**Joseph Fernandez**

Chair, Managing Director and Senior Advisor –  
Fieldpoint Private

**Richard A. Berkowitz**

Founding and Executive Chairman – Berkowitz  
Pollack Brant Advisors and Accountants

**Manuel Diaz**

Senior Partner – Lydecker Diaz

**Liebe Gadinsky**

Community Advocate

**Rochelle Gapere**

Chief Happiness Officer – Social Esquire, LLC

**Richard Giusto**

Global Real Estate Co-Chair – Greenberg Traurig  
(Miami)

**Ghislain Gouraige Jr.**

Managing Director, Wealth Management, Private  
Wealth Advisor – UBS Financial Services

**Linda Julien**

Council woman for Miami Gardens City Council Seat  
5- At-large

**David Lawrence Jr.**

Founder and Chairman – The Children's Movement of  
Florida

**Julie Neitzel**

Partner – WE Family Offices

**Victoria Rogers**

Vice President/Arts – John S. and James L. Knight  
Foundation

**Richard E. Schatz**

Managing Partner – Stearns Weaver Miller Weissler  
Alhadeff & Sitterson, PA

**Julie Vives**

Vice President and Chief Operating Officer – The  
Miami Foundation



## We are proud to call you family.

All of us at The Miami Foundation would like to thank our extended family of donors, grantees, fellows, professional advisors, elected officials, partners, friends, supporters. Thank YOU for standing with us this year.

Together, we demonstrated the true power of cohesive philanthropy. Because we stood with one another to assess needs and leverage our impact, we unlocked significant CARES Act dollars for local businesses. We purchased PPE at a fraction of the cost for our nonprofit sector. Our Racial Equity Fund attracted serious national funding. We supported more nonprofits than ever before through Give Miami Day. Our Census2020 effort was far more coordinated and effective, and our Policy Forums had a wider reach. We considered serious solutions to the digital divide. We sustained both large institutions and grassroots efforts.

2020 was a powerful reminder that we are greater than the sum of our parts. When our community's needs increased substantially in the face of hardships, we stood up, we gave generously, and we impacted change as a united force, leveraging decades of insights and expertise. The Miami Foundation exists for moments just like this. *We protect and sustain a more equitable, more resilient, more magical Miami for all who call this place home. In 2020, and forever.*

We are proud to be your community foundation, and we can't wait to strengthen Greater Miami even more boldly with you in 2021.

Rebecca Fishman Lipsey  
President and CEO

Richard A. Berkowitz  
Board Chair - Founding and Executive Chairman, Berkowitz Pollack Brant  
Founder and Chairman, Provenance Wealth Advisors