

2020

FREEDOM & VIRTUE INSTITUTE

ANNUAL REPORT



Committed to individual liberty, human dignity & self-reliance

Looking back over the past months, I can say that it has been a challenging year. All of us, as a society, have been disrupted in one way or the other. However, despite the difficulties, our Institute has moved forward and we have much for which to be grateful. Difficulties can be redefined as opportunities and such redefinition helps us look at the future with optimism.

That optimism arises from our unalterable belief in the dignity of every person and on the support of our donors, volunteers, partners, and staff. I can proudly say that we are positioned for a future where we can help more people live lives of meaning and independence. I can add that although disrupted in some ways our work has continued. We have not simply waited for a better future but have been active in our work to advance the ideas of freedom and faith that are the essence of who we are.

Some difficulties are worth mentioning. In March, the Institute's Board made the difficult decision to cancel our successful golf tournament. We had to reinvent how and from where our staff works to secure their safety. As most of our work with schools and other entities is in person, restrictions on physical mobility impeded some of our work. Expanding the number of people that we serve was a core focus this year and it became a daunting task due to the health crisis that still affects our nation and the world. Yet, as difficulties are opportunities, we found a way to continue our work and even add new schools for our Self-Reliance Clubs program, as well as, strategize to continue our plans and our commitments with churches, universities, schools, and other entities around the country. Existing partnerships remain and new partners, such as the Rising Tide Foundation and the Stand Together Foundation have emerged.

Our year-end financial results show continued stability and that has been possible due to the financial support of many of you. We are so grateful for all our donors. Your confidence in us is a strong signal for a bright future. One of the important commitments we are making as we move into the future is technology. Over the past year, we have begun to implement an e-commerce platform for our

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Generous donations from our supporters, in the forms of time, talent and treasures, continue to lead to significant achievements for the Freedom & Virtue Institute even in the time of COVID-19!

Self-Reliance Clubs that will help us improve the services we provide to students. Club participants will be able to be active even while they remain at home due to the Covid-19 crisis. Additionally, we have been able to continue offering our trainings using digital technology.

It has been the work of our team members that have allowed us to fulfill our mission. They are the heart and essence of what we do and how we can make a difference. If anything, I can say that this year has tested all of us. It has been a sort of break in the normal affairs of life. It has been a year for reevaluation and for positioning ourselves where we can better move forward with renewed commitment.

I am grateful to the Freedom & Virtue staff, our volunteers, and our Board for all that we have accomplished this year by turning difficulties into possibilities and possibilities into opportunities. Together we have established an incredibly strong foundation for progress and growth.

Ismael Hernandez
Founder

SPECIAL EVENTS

2019: Moved into new offices at New Brittany Blvd

2019: Golf Classic moved to The Club at Grandezza

2019: Second Annual Pro Freedom Tennis Exhibition held at Sanchez Casal

2019: Second Young Entrepreneurs Fair held at Flea Masters Fleamarket

2020: The Freedom & Virtue podcast launches

2020: SRC Craft & Cooking video series begins



WWW.FVINSTITUTE.ORG

STAFFING

In 2019 Kevin Schmiesing, PhD was hired as our Director of Research



Kevin Schmiesing (PhD, University of Pennsylvania; BA, Franciscan University of Steubenville) has written or edited dozens of books and articles in the fields of American religious history, the history of economics, and Christian social thought. Before coming to FVI, he was a research fellow at the Acton Institute for the Study of Religion and Liberty, where he served as executive editor of the Journal of Markets & Morality. He is second vice president of the Society of Catholic Social Scientists, a research associate at the Veritas Center for Ethics in Public Life, and a regular guest on the Son Rise Morning Show on the EWTN Catholic radio network. He resides in Ohio with his wife and children.

THE MISSION OF THE FREEDOM AND VIRTUE INSTITUTE IS TO PROMOTE INDIVIDUAL LIBERTY, SELF RELIANCE, AND HUMAN FLOURISHING.

We believe in leading initiatives that recognize the human capacity for self-realization and treat the poor as active participants instead of passive recipients of magnanimity. When systems of support reflect the nature of the human person as intelligent and creative, people prosper. Presently, the Freedom & Virtue Institute conducts two unique causes: Self Reliance Clubs and Effective Compassion Training programs.

Core Beliefs:

Individual Freedom: As historian and writer Lord Acton stated, liberty is not the power of doing what we like, but the right of being able to do what we ought. Having the necessary space to act freely enables people to fulfill their duties in life. People are free when, moved by an internal conviction of what they ought to do, they use their autonomy to recreate their environment for the good. For that space of freedom to exist we need government to be limited and the law to protect that freedom.

Human Dignity: Human beings have certain natural special capacities such as reason, which helps us to know and discover, and volition, or the capacity to choose. These potentialities allow individuals to know the truth and do the good, completing in this way the full measure of their dignity. In other words, human beings are moral agents. Our institute promotes initiatives that value and enhance human dignity by promoting good character, self-worth,



For the past 10 years, you have supported our need to educate, enhance and promote liberty and self-reliance, and we are so very thankful. As we prepared for our ninth annual signature fundraiser, the novel coronavirus (COVID19) appeared and the rules regarding public assembly began to change. And then, as the global pandemic raged, we were forced to make some tough decisions.

The health and safety of our donors, employees, and their families is our priority. We at the Freedom & Virtue Institute believe in protecting our staff, volunteers, and valued participants in our events. As you may be aware, we had to postpone our signature fundraising event, the Daniel D. Wright Golf Classic, until further notice.

We are closely following the findings and guidance of the medical community.



Meet Our Board



Neftali Feliciano is a financial representative that engages individuals, families, and business owners in the financial process.

He has been working within the financial services and business consultant industry since 2010. He received his B.A in education from Florida International University. He lives in Fort Myers and especially enjoys spending time with his wife Sheila and 3 children as well as participating in his local church. Neftali is proud to be involved with community organizations focused on education, civil involvement, and youth mentoring.

Donald Sporn is a retired executive from the food industry. His business experience includes logistics, business development, marketing and general business administration. Don graduated from Calvin College with a B.A. in Economics and has a Masters degree in Secondary School Administration from Columbia University.



Lisa Curry, AVP, Sr. Financial Center Manager. Originally from the Midwest, Lisa, along with her husband and son, made SW

Florida their home in 2004. Lisa has worked in Financial Services for over 20 years and is currently AVP, Branch Manager for a local financial institution.

creativity, entrepreneurship, and well-being.

The Greatness of Work: Human beings are called to flourish. They are not called to become passive recipients of magnanimity. Instead, their dignity calls for their active participation in lives built by themselves. Similarly, we are not called to manage their poverty or “save” them (There is one savior and it is not you!). We are instead called to suffer with them, to walk alongside those who fight for their lives. The best instrument in building lasting and positive change in our community is by creating avenues for people to use their talents in creative ways to find solutions to their problems.

Self Reliance: Human persons, as moral agents capable of changing their lives by their choices, are called to work, to activity, to put in motion their endowments. That is, we use the gifts God gave us to recreate our environment and produce positive outcomes for ourselves, our families, and our community. It is because we act that we can then cooperate with others, as we are called to communion! Our Institute encourages replacing the attitudes of entitlement and dependency by teaching individuals that they must become accountable for their own lives and well-being.

Our Programs

Our signature model project is called the **Self Reliance Clubs (SRC)**. Through these clubs, students at public and private schools and other organizations engage in all sorts of entrepreneurial initiatives to earn money and satisfy their educational needs. In the process, they receive financial literacy instruction and develop the sound character and virtues needed to become responsible and successful adults. Students work, learn, earn, and meet their needs. The clubs operate at public and private schools and at community centers

Clubs Scheduled to Start in 20/21:

- Miami, Hope for Miami
- Naples, FL, Grace Place
- Puerto Rico, Puerto Rico Club
- Dayton OH School District
- Detroit, MI – Made to Flourish Network
- New York City (various sites)
- Williamsburg, VA

Kindom Prep Lutheran High School in Wauwatosa is our newest Self Reliance Club in Milwaukee, WI. Their student chef, Terrance Thomas, Jr, (“TJ”) was featured in a local newspaper and served Ismael a fabulous lunch during his visit.



Kingdom Prep Lutheran High School began because of an incredible opportunity gap for young men in the City of Milwaukee. There existed very few seats at area Lutheran high schools and a scarcity of seats at other high performing private and public high schools. For instance, Wisconsin Lutheran High School had a waiting list of several hundred students who would be turned away. Milwaukee Lutheran’s situation was similar. The numbers grew every year.

There were also growing concerns for the state of boys. Thousands of young men were not equipped to succeed in life. With the proper level of intentional support, resources, and Biblical training, however, these young men would be empowered to break the cycle of poverty and blaze new productive trails for future generations. Boys are men in training, and an intentional effort needed to be made to address the growing lack of commitment to strong roles of fatherhood, marriage, and Biblical masculinity today.



Jaha Cummings, City Council Member, Punta Gorda is a 5th generation resident of Punta Gorda. He graduated from Dartmouth College with a degree in



Asian Studies. After graduation, he moved to Tokyo, beginning his career in marketing with client projects in the real estate, restaurant, fashion, and healthcare industries. A few years later he co-founded a technical college in Micronesia, which evolved into an international healthcare consultancy.



Samuel L. Rodriguez is a pastor and attorney who has been a faithful supporter and board member with the Freedom

& Virtue Institute for a number of years.

Victor V. Claar, Ph.D., is associate professor of economics in the Lutgert College of Business at Florida Gulf Coast University in Fort Myers, where



he holds the BB&T Distinguished Professorship in Free Enterprise. An Affiliate Scholar in Economics with the Acton Institute, Professor Claar is also an elected member of both the Mont Pelerin Society and the Philadelphia Society. Here in Florida he serves on the Research Advisory Board of the James Madison Institute. He is a coauthor of *Economics in Christian Perspective: Theory, Policy, and Life Choices*, author of the Acton Institute’s *Fair Trade? Its Prospects as a Poverty Solution*, and coauthor of *The Keynesian Revolution and Our Empty Economy: We’re All Dead*.



Joseph Welsh is a Financial Planner with Coastal Wealth who works with his clients to develop innovative strategies to efficiently accomplish

their personal, professional, and financial goals. A Boston native with a diverse background including military, engineering, and corporate management, now living in SW Florida with his wife Bora, and two young children, Lozen and Dominick. Joseph holds a core belief that financial literacy is a pillar to achieving success in any profession and feels that the lack of available classes incorporated into our education system places stress on our current and future economy. To make an impact on this, Joseph focuses on his own continued education while working with organizations like Junior Achievement to pass his knowledge on to children of all ages.

Blanca Contreras, Broker-Associate, is Team Manager for Contreras Team Internationalé. Her multi-cultural/lingual team of REALTORS has been serving the SWFL market since 1998.



Blanca is very active in the Affordable Housing community and volunteers on committees and also teaches the "Managing Your Money" portion of the HUD/Neighborworks first-time homebuyer classes. She served on the Board of Directors of the Ft. Myers Realtor Association Housing Foundation, a 501(c)3 organization.

She holds the Nat'l Asooc. of Realtors Designations for Certified Int'l Property Specialist (CIPS) and At Home with Diversity (AHWD). She is a member of Women's Council of Realtors (WCR), Nat'l Assoc. of Hispanic Real Estate Professionals (NAHREP) and Asian Real Estate Assoc. of America (AAREA).

Self-Reliance Club in Milwaukee Lutheran High School



"Good morning, Sir! I hope you and your family had a great Thanksgiving. I wanted to send you a couple of pictures of the first day of our Red Knight Café, which is sponsored by our Free Enterprise Academy in partnership with the Freedom & Virtue Institute's Self-Reliance Clubs! It took us a while to get going, as there were some logistical challenges that we could not have anticipated. And we are a work in progress, but we are finally up and running! We have a few students, but they are highly motivated, and we had a good first day and made a little money. =)"

The first photo is of three of the students who worked today and our Self-Reliance Club Instructor, Rev. George Lasley, who is an English teacher here at MLHS and has been invaluable in helping us navigate the weeks of challenges we had to get up and running. They are wearing their new uniform t-shirts which only arrived today!



The second is of some of the kids at work behind the counter. I started taking pictures near the end of the shift, so they weren't as busy.



The RKC (for this semester) will be open on Tuesday and Thursday mornings, from 7:00-7:45. At the end of the semester, we will regroup and evaluate and go from there."

Shannon M. Whitworth
Executive Director, Free Enterprise Academy



2020 Self Reliance Clubs

2020 has been a very different year for our school-based Self Reliance Club (SRC) program. January and February started out well with all clubs operating at full strength and a strong resolve among most of the teachers to encourage their students to experience entrepreneurial enterprise. We had two Young Entrepreneurs' Fairs planned – a new one in April and our usual one in October – and students began the year preparing Business Plans and projects for the April Fair.

In January and February gardens were in full growth, cooking and arts-and-craft clubs were producing wonderful products, clubs constituted by National Junior Honor Society students were fully engaged in community service and young entrepreneurs were innovating furiously. And then in March the COVID-19 pandemic descended upon our nation, and schools abruptly closed down in March with just 2.5 months left in the 2019/2020 school year. Teachers were seriously challenged to meet the academic requirements using on-line schooling and to get their students through the entire year's syllabus.

Some of the students in our Self Reliance Club program were unable to complete the 40 hours work requirement. The end-of-year field trips we had planned to Achieva Credit Union and ECHO Global Farm for those who graduated all the requirements of the Self Reliance Club program all had to be cancelled. In addition, the income the students had earned through their entrepreneurial pursuits that we normally award to them on their field trip, had to be mailed to them or taken to the school administrative office for the students to retrieve, rather than presented to them during their graduation field trips. And as a result, we lost the personal contact with the students that always adds so much to the students' end-of-year experience in our program.

During the time of the summer holidays the pandemic did not show any signs of lifting, and our nation's schools needed to plan for online schooling for 2020/2021. We at the Freedom & Virtue Institute needed to follow suit in order to continue to reach our students and so we prepared a series of entrepreneurial videos that were uploaded to the Institute's You Tube channel to teach the Self Reliance Club students how to make things they could sell. We have made videos that teach cooking, basket weaving, beeswax-





candle making, crochet, and gardening. We are preparing more instructional videos to be uploaded that teach other types of arts and crafts and woodworking projects.

At the time of writing this report (November), we remain in the midst of the COVID-19 pandemic but through the videos and other ways such as online Zoom meetings and constant contact with teachers, we continue to have contact with the Self Reliance Clubs. In November, we have been invited to cautiously go back to two schools to help students with their gardens and we have been invited back to a third school garden program in January to teach students there. At these schools we are only able to work with the students who have elected to attend the school for lessons – many students remain at home doing online classes. As a result of the pandemic some teachers have left schools resulting in fewer Self Reliance Clubs this year, and student numbers in the Self Reliance Clubs that are operational are also down. We expect these numbers to return to pre-pandemic levels quickly when the pandemic abates.

With the likelihood of Emergency Use Authorization being granted for some new COVID-19 antibody therapeutics and for two promising vaccines that are expected to be in use within the next two months, it is hoped that the fear of the COVID-19 virus will lessen and the SRC program will begin to resume some semblance of normalcy in the New Year. Meanwhile, through online communication with teachers and students, our Self Reliance Club programs in SW Florida and midwestern states, including three clubs in Milwaukee, WI, as well as, five clubs in the Dominican Republic, are continuing to experientially teach and encourage entrepreneurship, hard work and good character development at an encouraging rate, despite the limitations of the global novel coronavirus pandemic.

Mark Wardell, PhD - Director of the Self Reliance Clubs



Commonality Training

One of the principles of the institute is the principle of subsidiarity, which tells us that social action should be centered on the individual person, unique and unrepeatable, not on the group, or race, or the bureaucracies of the state. Three main communities form the heart of society: the family, the church (and other civic associations), and the business community. We want to offer priority to these communities where the individual exists and has a direct connection to others. One of our programs, the Self-Reliance Clubs, touches on the family, and our Effective Compassion Training touches on the church and private civic groups trying to help those in need. The only community that we did not yet have a program directly targeting was the business community. After all, we believe in economic freedom, free markets, and capitalism as being the best instruments to create wealth and improve the lot of people.

Our society has been experiencing a surge in radicalism with groups like Black Lives Matter, Antifa, American Freedom Party, and others. If you have been reading my articles in the e-newsletter I strongly oppose this radicalism and have been explaining in detail why. A result of the radicalism sweeping the nation is that many corporations and for-profit entities are buying into the false narrative of systemic racism, white privilege, etc., and now more than ever are being pushed to adhere to the ideas communicated through Diversity Training, Whiteness Theory, Critical Race Theory, and “anti-racism” training. Someone had to offer a challenge to these false notions.

In Commonality Training, we reject the idea of ethnicity or gender, or racial difference being the heart of organizations. Instead, we take the same principles, philosophy, and ideas that inform our other two programs and gear them toward the business community. There is nothing in Commonality Training that is similar to diversity training.



"We live in an age of confused thinking, largely because of a widespread and profound misunderstanding of who the human person is. Amidst this increasingly aggressive cacophony, Ismael Hernandez provides an urgently needed voice of reason, compassion and unity as it relates to race, equity and justice."



Luanne D. Zurlo | General Partner|Executive Director-BRILLA SCHOOLS NETWORK-An Initiative of Seton Education Partners



The brand-new Freedom & Virtue Podcast where we explore a variety of issues concerning the ideas and principles that

shape our life together in today's world. We will connect to discuss all of what makes humans flourish and communities thrive. The Podcast aspires to contribute to the intellectual life of our nation and equip listeners with the tools needed to explain and advance a society that promotes human dignity and respects individual freedom.

"This letter is to recommend the Freedom & Virtue Institute. We received their training program at our agency and it was thought provoking as to why we do the things we do. After the training, we re-evaluated our programs to see how we can better serve our clientele by assisting progression with their futures, while maintaining their dignity...FVI is a blessing to our community & country.

Charlotte Rae Nicely, Executive Director, Lehigh Community Services



"The Freedom & Virtue Institute takes seriously the primacy of basic communities such as the Church and the family in the quest to attend to human needs. Their important work is most certainly needed in our society. Also, Ismael Hernandez's book, Not Tragically Colored, is a must read for young and old alike."

Tom Monaghan - Ave Maria University, Founder - Ave Maria School of Law, Founder - Domino's Pizza, Founder

"In my estimation, Ismael Hernandez is one of the most significant emerging leaders to outline, defend, and restore sanity to our culture. The man and the mission of the Freedom & Virtue Institute are worthy of serious investment."



Father Robert Sirico, President of the Acton Institute for the Study of Religion & Freedom



"Like few others, Ismael Hernandez speaks factual truth regarding poverty and society at large using first-hand, real-life experiences as his basis. The Freedom

and Virtue Institute that he founded puts those truths into action by making a difference in individual lives through causes such as their Self-Reliance Clubs, Dignity of Work Initiative and Entrepreneurial Training. Their work is a hidden gem in America and warrants much, much larger platforms and bases of support."

Gary Regoli President/CEO - Achieva Credit Union

The Young Entrepreneurs Fairs

An important addition to our Self Reliance Clubs is the Young Entrepreneurs Fairs. Started in 2018, these are events where students belonging to our Self Reliance Clubs bring their products to the marketplace. After working on ideas and creating products at their school sites they bring these to the general public and taste what it means to become an entrepreneur. On that day, they "run their business" by interacting with clients and learning the basic ins and outs of business. The purpose is to help young people know how it feels to be free, to be your own "boss", and to cooperate with others in a business enterprise. In SW Florida, our main fair events are hosted by Flea Masters on Martin Luther King Boulevard. However, these fairs can happen anywhere and at any time. Hosting a fair can be surprisingly inexpensive. For a small fair, all you need is a small yard or some green space, a few donated card tables, and some excited and determined young entrepreneurs.

Effective Compassion Training:

People need knowledge of first principles and of practical ways of serving others in a dignified way. Our training helps people to think carefully before acting. Having the right intentions is important but it is not enough. Our training is an intensive one-day exploration of the foundations of service with staff, volunteers, and leaders of organizations that offer services to poor and under served communities. At the heart of the reason for our existence is the belief that the poor are to become the protagonists of lives built by themselves and not destined to remain as scenery in the drama of our good intentions.



Trainings Completed

- Acton University International Conference
- Christian Homeschool Educators, SW Florida
- Community Foundation of Morgan County, Indiana
- Concordia University
- Elmbrook Church Lake Country campus, Milwaukee
- Elmbrook Church Main Campus, Milwaukee
- Foellinger Foundation, Fort Wayne, Indiana
- Habitat for Humanity, Lee County, FL
- Kibaoni Primary School Foundation Board
- Lifeline Family Center
- Milwaukee Partners and Churches training
- Minutemen Project, Pennsylvania

- Poverty Cure International Summit

Special Event Presentations, Short Trainings & Events:

As part of our mission, we host or participate in events that both spread the ideas of a free and virtuous society and bring about awareness of our services and programs.

Partnerships:

The Freedom & Virtue Institute values partnering with like-minded organizations. For the last two years, we have cultivated close relationships with a good many institutions, including the following:

- Acton Institute for the Study of Religion & Liberty
- Community Foundation of Morgan County, Indiana
- Achieva Credit Union
- The Moorings in Naples
- The Harper Foundation, FL
- Emmanuel Lutheran Communities, Naples
- First Presbyterian Church, Bonita Springs
- Rising Tide Foundation, Switzerland
- Cape Coral Community Foundation, FL
- Westminster Presbyterian Church, Fort Myers
- St. Columbkille Catholic Church, Fort Myers
- Price Foundation, Fort Myers
- Gallagher Foundation, Chicago
- ATLAS International Network
- Children of the Nations
- Foundation for Economic Education
- Foundation for Government Accountability
- Made to Flourish Network
- Hope for Miami, FL
- Florida Gulf Coast University Economics Department, FL
- The School District of Lee County, Florida
- Milwaukee Lutheran School, Wisconsin
- The Heights Center, Fort Myers
- Grace Place, Naples
- Rotary Club Cape Coral, FL



The Rising Tide Foundation was created with the belief that those who are most vulnerable to critical issues and who are willing and ready to take on responsibility are the most effective agents of change and should contribute as members of society with a spirit of freedom to solve their own problems. The Foundation's Board Chairman, Shawn Stephenson says it best, "At Rising Tide Foundation, we believe the market economy, in concert with limited government and rule of law, holds the greatest promise of freedom and prosperity for all." We are honored to partner with The Rising Tide Foundation.



Dr. Mark Wardell, director of our SRCs receiving a \$5,000 check from the Cape Coral Community Foundation president Michael

Chapman.



"The Effective Compassion Training offered to members of New Hope Presbyterian forced all in attendance to re-evaluate how we were "helping the poor." It was hard for me to realize that the many good things we were doing were really providing the wrong incentive to those we thought we were helping. To all who participate beware, you will be challenged to rethink some long held assumptions."

Stu Austin, Associate Pastor of New Hope Presbyterian Church, Fort Myers, FL

HOW CAN I SUPPORT THE FREEDOM & VIRTUE INSTITUTE?



**Help us continue and grow,
nationwide and internationally.**
Time, talent and treasure!

1

Sign up for our newsletter and podcast, follow us on social media, and share our news with your friends, coworkers and family! www.fvinstitute.org

2

Volunteer to help with our Self Reliance Clubs or events throughout the year. Email info@fvinstitute.org with the subject line VOLUNTEER.

3

Complete the enclosed pledge card and return it in the envelope provided. Or you can visit www.fvinstitute.org and click the DONATE button.

Your generous support is greatly appreciated. Freedom & Virtue Institute is a registered 501(c)(3) nonprofit organization. Please consult with your financial advisor on tax benefits.

**HELP PROVIDE SELF RELIANCE WITH
YOUR END OF YEAR GIFT! DONATE
NOW**

Celebrating
1
years

Committing to Mission, Integrity & Individual Liberty

**FREEDOM & VIRTUE
INSTITUTE**
Committed to individual liberty, human dignity & self-reliance

**ALWAYS A HAND UP,
NOT A HAND OUT**

