

2GEN
(TWO-GENERATION)
**WHOLE CHILD.
WHOLE FAMILY.**




**COMMUNITY
FOUNDATION**
of Sarasota County



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Our Mission

Community Impact Powered by Philanthropy

Our Work

We unite people and organizations to create opportunities for families across generations to improve their lives through cultural, educational, economic, and social support.

Every one of us has the potential to impact another person, a cause, a community.
Be The One.

LETTER FROM OUR BOARD CHAIR AND PRESIDENT/CEO

LEGACIES

Like so many, we have dedicated a lot of time the last few months thinking about our responsibility to the generations to come. Joseph Addison said, “Books are the legacies that a great genius leaves to mankind, which are delivered down from generation to generation, as presents to the posterity of those who are yet unborn.” What a beautiful notion that like a great book or poem, our gifts can deliver “generation to generation” a helping hand or opportunity as a present from the past to the future.

It is our distinct honor and privilege to work alongside so many people like you who are committed to helping others, and who have a vision and made commitments to bring about a brighter future for all in our community.

In this issue of our newsletter we examine how philanthropic investments have inspired, guided and evolved through a decade of our intentional two-generation approach to helping families (p. 4). This long-term examination of and commitment to positively impacting the “here and now” of the parents, and the trajectories of the lives of their children for decades to come.

We are also honored to share what drives Jack and Priscilla Schlegel in their decisions to support artistic endeavors that can ignite civic participation and critical thinking (p. 10). The investments the Schlegels have made and will continue to make in our community are truly the shade trees others will rest beneath well into the future.

Support from many of you offers that same bough of cover for many nonprofits thanks to the support provided through our Giving Challenge. The story on page 8 is not about dollars raised, though; it outlines three examples of how participating in this special online giving event informs nonprofit strategy and builds capacity for all who participate. By making these Giving Challenges fun, thoughtful, and meaningful,

their effects will echo for many years to come through the organizations that offer so much to our community.

Finally, on page 12, it is bittersweet to recognize the passing of the torch among our foundation’s amazing financial leaders. At the start of the year our longtime Chief Financial and Administrative Officer Laura Spencer announced her intention to retire later this summer. Laura will be succeeded by longtime Vice President of Finance and Operations, Erin Jones, who has served under Laura’s leadership for nearly 10 years.

We are honored that Laura has chosen to conclude her incredibly successful career with our Community Foundation after guiding us through a period of incredible growth (180% growth in assets since 2012), with sound financial practices leading the way. We are confident this transition will be done with the utmost care and ensure that the trust our donors have in us will be upheld under Erin’s leadership. As part of Laura’s strong team, Erin has the deep knowledge about our community, our donors’ expectations, and our operations to continue to help us grow as our foundation becomes more complex. Legacies like Laura’s that allow us to provide the highest level of confidence, integrity, and trust are what make our Community Foundation strong.

With Appreciation,



Daniel DeLeo, Board Chair



Roxanne G. Jerde, President and CEO

A COMMITMENT TO FAMILIES

A decade ago our Community Foundation came together with Ascend at the Aspen Institute to formalize our 2Gen approach as the critical lens in which we view our impact. Today, more than ever, we continue to be focused on how to move the needle on core indicators in our region – from education to workforce development to economic vitality – by focusing on families.

This approach was built upon the groundwork of programs begun in the 1990s and early 2000s like the Nurturing Dads Initiative and L.E.A.F. (Literacy Empowers All Families), thanks in part to the generosity of donors like Edward K. Roberts and Jo Bowen Nobbe, whose legacy funds keep families as their focus. Our whole-child, whole-family philosophy – a

two-generation (2Gen) approach – guides much of our community investments and supports.

Over a decade on of intentionally leading with this philosophy we’ve seen valuable lessons emerge. Here we look back at some milestones from the last decade, and share what we have learned by shaping a long-term, multi-generational approach to helping families thrive while addressing our community’s most pressing challenges.

2012: Mary Kay and Joe Henson’s vision for a family-centered approach to changing lives launched a 2Gen pilot called Eagle Academy at Alta Vista Elementary School in the summer of 2012. Eagle

THE SIX KEY COMPONENTS OF TWO-GENERATION APPROACHES

Two-generation (2Gen) approaches build family well-being by intentionally and simultaneously working with children and the adults in their lives together to access new resources, solve problems, and sharpen existing skills.



POSTSECONDARY & EMPLOYMENT PATHWAYS

community college training and credentials
workforce partnerships

K-12

kindergarten ready
3rd grade reading skills
parent engagement
graduation and postsecondary prep

EARLY CHILDHOOD EDUCATION

Head Start
Early Head Start
child care partnerships
preK
home visiting

SOCIAL CAPITAL

peer and family networks
coaching
cohort strategies

#2GEN

HEALTH, INCLUDING MENTAL HEALTH

mental, physical, and behavioral health
coverage and access to care
adverse childhood experiences
toxic stress

ECONOMIC ASSETS

asset building
housing and public supports
financial capacity
transportation

WHOLE FAMILY



Alta Vista Elementary School's Eagle Academy brings to life the 2Gen approach of family well-being by bringing new resources to children and adults.

Academy provided then, and continues today to offer free comprehensive summer education to enrolled pre-kindergarten through rising third grade students while simultaneously providing certificate and training programs for parents. The program includes a social worker and opportunities for families to build social capital and strengthen their economic status through a parent university, while also providing transportation vouchers, job training, dinner events, and food pantry access.

2013: Through the lens of a 2Gen approach, Community Foundation staff saw an opportunity to address the key pillars of the national Campaign for Grade-Level Reading, which include increasing third grade reading proficiency by reducing both summer learning loss and chronic absences. Ultimately, this leads to reducing intergenerational poverty, closing the achievement gap, and reducing high school dropout rates. At the end of this year the Community Foundation became the lead agency for Sarasota County's acceptance into the national campaign and decided to focus on student success in four high need or Title 1 school attendance zones in northern Sarasota County that had opportunities to make the greatest gains.

2014: The Community Foundation established a 2GEN Task Force committed to taking the philosophy to a level of greater visibility. Specific funds and giving strategies were established, along with a commitment to gain greater community support so that 2Gen would be further embedded, integrated, and embraced beyond the Community Foundation.

2015: The task force designed a two-day 2Gen convening that engaged stakeholders from Sarasota County and neighboring counties. The 2Gen Summit was held the following year on April 5-6 at the Lee Wetherington Boys & Girls Club of Sarasota County, bringing together more than 200 people from around the state to learn the core tenants of this approach from Ascend Fellows.

2016: With successes building, the Sarasota County Campaign for Grade-Level Reading was recognized as a national "community solutions pacesetter" among its peers across the country. The campaign also grew regionally with support from The Patterson Foundation to expand and include Manatee, DeSoto and Charlotte counties, becoming known as the Suncoast Campaign for Grade Level Reading. Each community determined its own approach to bring needs of parents and children together in ways that worked best for their residents.

continued...



The national Campaign for Grade-Level Reading's focus on reading proficiency, as well as reducing summer learning loss and absenteeism directly aligned with our commitment to providing families the building blocks needed to improve their lives with community supports.

2017: Recognizing that much learning happens well before a child ever arrives at elementary school, our strategy evolved to include early childhood education. By providing quality early learning experiences in childcare facilities, homes, and across the community, students can be poised for success once they matriculate. This year the Community Foundation began a three-year collaborative pilot program with Horizons Unlimited Christian Academy that included support for teachers, students, and their parents. This year the foundation also began providing financial stipends to place mental health clinicians employed by The Florida Center for Early Childhood within Sarasota County elementary schools.

2018: Data from pilot site summer learning academies that showed students taking part in the program made learning gains and outperformed their peers. Sarasota County Schools leaders were able to use this information to successfully advocate during the legislative session to secure state funding to support the Summer Learning Academies long term. That summer, 11 elementary schools in Sarasota County offered Summer Learning Academies, which

included a “Parent University” program – all at no charge to student families. What had started with 62 student families in 2012 would go on to reach more than 1,400 households by summer 2019 in 12 elementary schools.


2019: In partnership with several rural community colleges in Florida, we connected them with 2Gen strategies and support for 182 scholarships to students who are parents. Some 90% of those students are female, and half are single mothers. Knowing that the average age of the students supported is 30 years old and that 75 percent of them are attending college part-time is helping reshape how community colleges approach students as parents. We anticipate learning from these parent students how to offer even greater supports so that education leads to economic vitality for them and their children.

2020: In the spirit of continuous improvement, the Community Foundation turned to parents of students taking part in programs we support to learn how parent-centered strategies could further expand opportunities to improve education, economic stability

and mobility, and overall quality of life of whole families. A Parent Advisory Council was created to listen to the concerns and hopes shared by parents – and to unite a supportive group of parents trying to improve their own lives, as well as the lives of their children. During the pandemic the group adjusted and changed their check-ins to virtual zoom meetings, not missing a beat. By building a small – but effective – support network, these parents drew from their peers the resiliency, accountability, and knowledge and resources needed to persevere during an unprecedented time.

2021: We learned that since 2013, more than 80 percent of the 194 parents whose children attended Tuttle, Alta Vista, Gocio, and Emma E. Booker completed a college program. Within that same group, 85 percent increased their annual wages by more than \$7,100. A report of how 2Gen-focused programs are tracking measurable outcomes is available at: www.cfsarasota.org/media-center/publications.

Each of these steps reflects our Community Foundation’s commitment to a long-term, whole-family philosophy of support that assists families

through educational successes and economic security improvements. This 2Gen work directly affects community-level outcomes and affirms ours is a community where everyone can thrive. 

3 Key Lessons Learned

- **Collaborate to push through complexity.** Evidence-based partnerships that show how small changes turn into big wins allow others to see possibilities and adopt and broaden 2Gen opportunities.
- **The success of an adult’s life directly influences their child’s success.** Empowering parents to enroll in post-secondary education or seek out foundational skills is essential to helping a whole family.
- **Center those voices closest to the challenge.** Programs designed without input will fail. The people we serve must be part of refining how we help families learn to advocate for themselves and navigate (and hopefully change) systems of support.



The 2Gen Summit brought together more than 200 professionals, supporters, parents, educators, community leaders and Ascend Fellows including Aisha Nyandoro (left).

CHARTING THEIR OWN PATH

Every other year, in preparation for the Giving Challenge, the Community Foundation of Sarasota County launches a series of capacity building opportunities for participating nonprofits in the form of trainings provided at no cost.

All trainings are relevant and beneficial to nonprofits' success in the Giving Challenge, and they cover a variety of topics designed to help organizations maximize the likelihood of earning those precious unrestricted funds. Perhaps most importantly, the skills acquired from the trainings can be applied to daily organizational practices, lasting far beyond the Giving Challenge campaign.

This year, which marked the 8th Giving Challenge, we held seven capacity building trainings for participating organizations, including leveraging peer-to-peer

fundraising, board engagement, and making the most of matches and challenges.

As part of these trainings participants learn directly from other peer organizations that have been successful in past challenges.

"We are offering organizations the necessary tools to build and cultivate fundraising potential through these trainings," said Ranata Reeder, Vice President of Knowledge & Equity, the department overseeing nonprofit trainings, including the Giving Challenge.

Three organizations that greatly benefited from these sessions and had great success during our last Giving Challenge in 2020 offered their key lessons learned for keeping the momentum going after the Giving Challenge has passed.



In the 2020 Giving Challenge, Easterseal Southwest Florida engaged its board members in friendly competition to launch a creative campaign.



Carolina Murphy and her family formed “Team Murphy” to support Neuro Challenge Foundation for Parkinson’s to encourage donations through peer-to-peer fundraising.

Peer-to-Peer Fundraising: Neuro Challenge Foundation for Parkinson’s

Neuro Challenge Foundation for Parkinson’s is dedicated to improving the quality of life of people with Parkinson’s and their caregivers. In 2020, they enlisted longtime member and “super volunteer” Carolina Murphy to engage her networks into action in order to support the organization’s Giving Challenge efforts as a Fundraising Champion.

But Carolina doesn’t work alone. Team Murphy is a family who lives, works and plays together – and during the 2020 Giving Challenge they helped Carolina reach the Top 10 Champions leaderboard and inspire over 700 people from the local Parkinson’s community to give through their winning Peer-to-Peer fundraising campaign.

Team Murphy and other Champions inspired a level of giving like never before and helped others to see they are never alone in their Parkinson’s journey.

Creative Campaigning: Humane Society of Sarasota County

The Humane Society of Sarasota County’s genius “Be the One to Donate and Chill” campaign was born out of the need they saw in the community for an

escape from 2020 pandemic uncertainty. Their light-hearted, feel-good messaging, combined with Netflix-inspired programming, was not only relatable, but also inspiring. The campaign paid off, as the organization surpassed the support they had received in previous years and tied for best overall campaign.

Board Engagement: Easterseals Southwest Florida

Easterseals is the umbrella entity of its namesake organization, along with strategic alliances with InStride Therapy and ABA Academy. The three entities united several years ago to overcome geographic barriers and provide greater services to families of all abilities throughout Southwest Florida. But it wasn’t until the 2020 Giving Challenge that the blended organizations discovered how much more they could do together beyond centralized operations through a creative and fun board competition.

In 2020, the boards of the merged organizations were split into teams and assigned specific time periods throughout the Challenge. Each team engaged their circles of influence, asking them to donate through the Giving Challenge to the appropriate nonprofit – Easterseals, InStride or ABA.

Each nonprofit raised more money than in 2018 (it was ABA’s first Giving Challenge) and, better yet, enjoyed the virtual celebration on Zoom at the Challenge’s conclusion. Since then, InStride and ABA Academy have merged, becoming departments with the Easterseals operation. 🏠

Each campaign was effective in employing three of the tools offered as part of the Giving Challenge. Through them, these organizations expanded knowledge and skills and were able to remain engaged with and expand their circle of supporters well beyond the Giving Challenge.

Full results of the 2022 Giving Challenge are available at www.GivingChallenge.org

PHILANTHROPY: THE JOY OF THE ARTS – JACK AND PRISCILLA SCHLEGEL

Courtesy *Scene Magazine* • By Ryan G. Van Cleave • Photo by Nancy Guth

When I interviewed Jack and Priscilla Schlegel for this article, one thing became immediately apparent—they were one of Those Couples. Happy. Joyous. Equals. “We’re best friends who’ve been married for fifty years, or something like that,” said one, to which the other said, “Fifty-four years.” And it’s pure clarifying versus chastising. Later, they told me: “We complement each other, learn from each other, and grow together.”

Given that, it makes perfect sense when they explain, “In our interest areas and our thoughts about philanthropy, we are absolutely alike.”

While the Schlegels are making their mark on the local philanthropic scene after moving here in 1998, it’s not from seeing philanthropy firsthand as children. Priscilla says that neither of them grew up with that kind of wealth. In fact, Jack worked hard to put himself through pharmacy school at the University of the Pacific—the same school Priscilla attended for a year before transferring to University of California-Berkeley, where she fell in love with computers but ended up with a degree in the humanities. She fell in love with Jack, too, and soon after they both completed school, the two married. After robust careers that took them to Washington, DC—he worked as CEO for the American Pharmacists Association, and she worked for the RAND Corporation, which is a nonprofit global policy think tank—they’d had enough of the cold weather. A friend insisted, “You’ve got to go to Sarasota. That’s where all the culture is!”

“And that’s why we’re here,” Jack said with a laugh. It proved to be the perfect place for them to live because they both love the arts. Jack pointed out that the Sarasota Herald-Tribune’s art critic, Jay Handelman, jokes to them that “you go to more things than I do!” And Jay might be correct. Jack and Priscilla have season subscriptions “to every professional theatre in Sarasota,” and they’re often attending shows four or five nights a week.

Soon after they relocated to Florida, a philanthropist neighbor told Jack and Priscilla that while they were supporting the arts to a degree, they should give more generously if they could. “The hearse doesn’t have luggage racks,” she warned. Even if they weren’t childless, Jack and Priscilla believed that advice to be spot-on. “If you give it away while you’re alive, you can enjoy seeing it being used,” Jack realized. “You can hold organizations Jack and Priscilla Schlegel accountable to make that happen, and you’ll derive enormous pleasure. You might even stimulate others to be more generous!”

They took philanthropy so seriously that they enrolled in a philanthropy course to ensure they moved forward in a sensible manner. From that point on, they realized that they could afford to give more heavily, which led them to helping the Westcoast Black Theatre Troupe and the Manatee Performing Arts Center build two new theaters. “We really like how they have good education programs, and how they promote youth in the arts,” Priscilla said. At the end of 2021, she and Jack donated \$200,000 to support Florida Studio Theatre as a gift to celebrate how local theatre engages people, creates community, and promotes education.

To help them with their philanthropy, Jack and Priscilla partnered with the Community Foundation of Sarasota County in 2015. “We did our research on them and we were very impressed,” Jack said. “We actually interviewed the Foundation to see if it was where we wanted to put our money. We liked their philosophy—it’s so rooted in really understanding the needs of the community. They also had the ability to help us set things up so that, upon our deaths, our remaining wealth will be administered by them in perpetuity to help the areas we believe in. They gave us that mechanism.”

Jack and Priscilla love partnering with the Community Foundation in general and their President and CEO, Roxie Jerde, in specific, because Roxie is a fan of



“They [the arts] survived because of philanthropy. We’re glad to have been part of that.”


– Jack Schlegel

partnerships and offering ways to encourage others toward philanthropy efforts. Jack added, “We like to leverage our money in such a way that draws in other people to participate. We’ve found that it works. If you offer a 1:1 match with donations, it brings out a lot of new donors.”

While Jack and Priscilla have various philanthropic interests—they support numerous health and social services, such as school lunch programs over the summer, and Jack serves on the board of the New College Foundation—their passion in the arts is unmistakable. Jack made a point of noting that “one of the things we want to see is a new orchestra hall. We’re going to be behind that big-time when it’s ready to move forward.” He emphasized how special our community was by citing how during the pandemic, many orchestras around the world fired their musicians because no performances were happening. While the Sarasota Orchestra wasn’t performing either, not a

single performer was laid off. Not one. “They survived because of philanthropy. We’re glad to have been part of that.”

Through the arts, Jack and Priscilla have “met absolutely wonderful people, many of whom we might not otherwise have met. They’re so intellectually and psychologically stimulating.” Plus, Jack notes that when they see live shows, they’re completely engaged. For example, when they attend a show at the Florida Studio Theatre, “it’s just so thought-provoking. We spend our time walking back home talking about the play. Often before going to sleep, we’re still talking about the play. What was its message? What does it represent? It occupies so much of our mental space.”

I don’t quite recall whether Jack or Priscilla said this, but it doesn’t matter since they both so clearly meant it. “It’s just our life, the arts,” they told me. “It’s totally who we are.” 



“You need a strong number two. If you have a strong number two it makes your number one so much better.”

– Laura Spencer,
Community Foundation
of Sarasota County

Erin Jones and Laura Spencer have worked together at the Community Foundation of Sarasota for a decade. (Photo by Lori Sax)

FOUNDATION CFO SETS RETIREMENT DATE — WITH REPLACEMENT AT THE READY

Courtesy *Business Observer*

Sarasota native Laura Spencer has worked for three of the region’s most prominent entities over the past 34 years: leading CPA firm Kerkerling Barberio; drinkware manufacturer Tervis, where she was CEO for four years; and, most recently, the Community Foundation of Sarasota County, where she’s been CFO for a decade. While accomplished, and dedicated and passionate about her work, Spencer has often said, “I’m not going to be one of those people who works until 70.”

She thought 60, tops. That was before the pandemic. And before May 2021, when Spencer’s mom died, unexpectedly at 83, after a short battle with pneumonia. Two months later Spencer’s stepfather,

96, died, of natural causes. (“I really feel like he died of a broken heart — he missed my mom so much,” Spencer says.)

The retire-at-60 mantra took another dent, too, when Spencer read the book “Die with Zero: Getting All You Can from Your Money and Your Life,” by Bill Perkins. The book sets up guideposts to “maximize net fulfillment over net worth.”

With all those happenings, it makes sense an epiphany hit the 57-year-old Spencer in early 2022: If she can financially afford to retire and live the life she wants to, “why do I have an arbitrary age of 60?”

So Spencer decided to retire from the foundation, setting a date of July 22. In doing so she set in motion an essential component of leadership: finding, hiring and preparing your replacement before you leave. Spencer has that in Erin Jones.

The foundation's vice president of finance and operations, Jones, also a Kerkering Barberio alumna, joined the foundation a few months after Spencer, in 2012. Spencer hired Jones to help guide the department, which then had three employees and managed assets of some \$194 million. A decade later the foundation has \$520 million in assets, up 168%, and the Spencer-Jones led department has doubled in size, to six employees. Jones, 44, will take over as CFO July 25.

"You need a strong number two," Spencer says. "If you have a strong number two it makes your number one so much better."

Jones adds while it was never a 100% given she'd be the next CFO, it was a sometimes spoken, sometimes unspoken plan. "We didn't have daily conversations about succession planning," Jones says. "But it evolved."

Community Foundation President and CEO Roxie Jerde agrees there was an evolution to Jones' rise. While Jerde might have thought Jones would be CFO 'someday,' she was a bit caught off guard when Spencer told the CEO in January about her retirement plans. "Laura's wicked smart, but also humble," Jerde says. "And has so much common sense."

Jerde lauds Spencer for not only giving seven months notice, but for mentoring and supporting Jones over a decade. That goes for department continuity, but also

shows the 33-employee organization that even in a small operation, there's significant promotion potential. "I really can't believe Laura will no longer be by my side," says Jerde, who was named CEO in March 2011 and hired Spencer a year later. "But I'm really excited for Erin."

Jones and Spencer are both colleagues and good friends — and both are also preparing for an initially challenging adjustment period. "It's going to be hard at first," Jones says, adding with a smile that Spencer "told me she'll go out to lunch with me as much as I'd like."

The pair met in 2006, when they were classmates in Leadership Sarasota, a program run by the Sarasota Chamber of Commerce for business and civic leaders to get to know the community better. Jones recalls she was intimidated by Spencer, then CEO of Tervis, and hesitated to approach her on bus for a Leadership field trip. The two soon found common ground, as both had worked at Kerkering Barberio, albeit not at the same time.

In 2012, Spencer, soon after joining the foundation, sought a No. 2. "I'd interviewed a few people," she says. "I wasn't feeling great about the candidates and then I saw Erin had applied."

A decade later, a leadership transition unforeseen in 2012 is now in full swing. Spencer says her retirement plans include traveling and following her passion for outdoor sports, especially tennis, golf and cycling.

Jones says her big-picture goal is simple to say, hard to execute: with her moving up, now she needs a No. 2. Says Jones: "Hiring my new Erin will be critical. 🏡"

Bottom Line

Key takeaway: Laura Spencer, who has been CFO for the Community Foundation of Sarasota County for a decade, plans to retire in July. A top sounding board for foundation CEO Roxie Jerde, Spencer has spent considerable time finding and mentoring her replacement.

Core challenge: The foundation, which has grown assets 168% while Spencer has been CFO, to \$520 million, has to maintain top-level controls on finances during the transition.

What's next: The foundation's CFO-in-waiting, Erin Jones, who Spencer hired in 2012, is already looking for her eventual replacement.

LEADERSHIP

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Newsletter Contributors:

Mischa Kirby, APR
Lori Liggett
Leonela Tase Suiero
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— 2022 —
**GIVING
CHALLENGE**

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Presented by the
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