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PHOTO BY JOHN REVISKY

## 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.**

### Cover photos, from top left:

1. The Sarasota Players
2. The Sarasota Ballet – “A Time of Beauty” choreographed by Jessica Lang
3. Florida Studio Theatre – Photo courtesy of Visit Sarasota County
4. WEDU – “Greater Sarasota” Series
5. Asolo Repertory Theatre



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## LETTER FROM OUR BOARD CHAIR

Dear Friends:

When we reach a big life milestone—whether it's a special birthday, anniversary, or a personal achievement—it naturally prompts us to pause and reflect. It's a time to look back on the changes, the challenges, and the triumphs we've experienced. We smile at the memories, appreciate how far we've come, and dream about what the years ahead might hold.

This year marks a significant milestone for us as we celebrate our 45th anniversary. It's a time for retrospection, a moment to honor our journey thus far. Throughout these years, our organization has evolved, adapted, and grown, but what has remained constant is our dedication to building a community where opportunities abound for every individual. From our early days to where we stand now, we've stayed true to that goal, making an impact through our grants and programs and, perhaps more importantly, through the partnerships we've formed, like our collaboration with The Patterson Foundation (page 10), which helps us create lasting, positive change and brings us closer to a future where everyone has the chance to thrive.

One of the key figures in our journey has been our beloved President and CEO, Roxie Jerde. Since joining us in 2011, Roxie has been a transformative leader. Under her guidance, our assets have grown significantly, allowing us to support even more people, projects, and dreams (page 12). As we look toward our future, the Board is committed to finding the right leader to build upon our history and momentum of building a strong community. The professional staff continues to carry out our vision and build upon the growth and success achieved during Roxie's tenure as the search continues.

We understand, however, that the work of the Community Foundation is never the work of one individual, it is the work of all of us. It is your trust in us with your legacies, your hopes, and your dreams for the future that enables us to do this work. This spirit is infused in the mission of the Muriel O'Neil Fund for the Performing Arts (page 4) allowing the Community Foundation to work on behalf of those who have passed with fidelity. Together, we are building a stronger community—one where everyone has a chance to be the one to make a difference in the life of another person, a cause, a community.

As we celebrate our 45th anniversary and look forward to the next 45 years with optimism and joy – we thank you for your ongoing support, your dedication to our mission, and your belief in the power of a shared future.



Marilyn Thompson, Board Chair

## Impact: The Muriel O'Neil Fund for the Performing Arts

### A TALE OF TWO SISTERS

For nearly a decade, our community foundation has invited individuals and families we work with to behind-the-scenes tours of local nonprofit organizations to gain a more in-depth understanding of their work. Over the years we have visited charter schools, scientific research organizations, and many human services organizations to learn about the issues they aim to solve, or possibilities they imagine for a stronger community. These tours even continued virtually throughout the COVID-19 pandemic as a way to remain connected and to keep abreast of the evolving nonprofit landscape in our region.

Colloquially known as “Third Thursdays” – as the programs take place the third Thursday of certain months – the 2025 series highlighted arts organizations that are cornerstones of our cultural repertoire in Sarasota County that were included in the legacy of two very special sisters, Muriel O'Neil and Dr. Gertrude Hight.

#### Founded on Love

Sisters Muriel O'Neil and Gertrude Hight first fell in love with the performing arts years ago, when the pair moved to Sarasota upon retiring. Their story is legendary: born in Chicago, they both started off as writers in New York City. Muriel enjoyed a distinguished publishing career, working at *American Heritage*, *The New York Times*, and a spattering of magazines. Gertrude returned to school late in life to study psychology and finished her career as Dr. Hight, psychologist.

Childless when the sisters retired, they purchased separate condos in the same building overlooking Sarasota Bay and spent their golden years as fixtures of the local arts and culture scene, but perhaps in unexpected places. They served as ushers, volunteered behind-the-scenes, and built deep



relationships with team members at the organizations they cherished.

Florida Studio Theatre was a favorite of the sisters, and FST Managing Director Rebecca Hopkins recalls Muriel would eat lunch with staff on the back patio.

“She [Muriel] was known throughout FST for her fun-loving and warm spirit,” Hopkins shared at a tour of the theatre in January 2025. “They [Muriel and Gertrude] attended shows, of course, but their passion for the theatre ran deeper; they volunteered, became donors, and befriended staff.”

When Muriel passed away in 2013, she left her estate to Gertrude. But Gertrude, not needing the money, came to imagine a bigger vision with guidance from her estate attorney, Susan Hecker, now retired from Williams Parker.

#### A Legacy Grows

Hecker was key to helping Gertrude consider greater possibilities on how to invest Muriel's estate so that the organizations she and her sister enjoyed so thoroughly would benefit in ways that they may not have imagined.

“Gertrude wanted to honor her sister in a way that gave back to the arts organizations that Muriel had been volunteering with and had been quietly supporting for many, many years,” Hecker said.

Over time, exactly how that support would manifest would depend on the needs of those organizations and the needs of the community, with guidance from the Community Foundation.

With that counsel, Gertrude established a fund in her sister's name: The Muriel O'Neil Fund for the Performing Arts at the Community Foundation of Sarasota County. The fund was created to give to specific arts organizations, including FST, as well as Asolo Repertory Theatre, The Sarasota Ballet, The Sarasota Players, and WEDU (see sidebar for details on support).

The community foundation's vice president of philanthropy, Jay Young, said this year's tour series has resonated with attendees. The idea of working collaboratively with nonprofit organizations to create new spaces and new programs that neither of the sisters would have been aware of in their lifetimes instills confidence in the foundation's long-term ability to work on behalf of those who have passed with fidelity.

“We are honored to be the trusted stewards of Gertrude's vision and to help her sister's name carry on—just as we are for so many others who wish to leave a lasting mark on our community,” Young said. “The community needs and those of nonprofit organizations is always evolving and so the possibilities of a legacy are truly endless.”

Hecker said that the projects and programs supported by the Muriel O'Neil Fund for the Performing Arts has reached far beyond any early concepts.

“Even though I don't think that either of them ever would have imagined their family names on a billboard on the side of a building, I think they would have focused greatly on all the good things happening inside that building, every day,” Hecker said. 🏡

## Notable support from the Muriel O'Neil Fund for the Performing Arts since 2018

### Florida Studio Theatre

- Sustaining sponsor for programs and expansion of the campus, including a new costume studio in the Montminy Wing and administrative offices in the Sudakoff Wing.
- Underwriter for FST's Winter Mainstage Series, in perpetuity.

### Asolo Repertory Theatre

- Enhanced sound system in the Mertz Theatre.
- Commission of the Muriel O'Neil American Heritage Series, which supports underrepresented playwright voices in American theater.
- Multi-year support of the Muriel O'Neil Education and Engagement Director staff position.

### WEDU

- Development of the inaugural “Greater Sarasota” series, a hyper-local documentary series that showcased people and projects from local arts groups that ran for three years.
- Assisting with the transition of programs and services from WUSF-TV Public Media.

### The Sarasota Players

- Support of the capital campaign for the 100-year-old community theater's new performance space.

### The Sarasota Ballet

- Support of “Dance the Next Generation,” the company's community engagement program that offers a tuition-free dance education to students in grades 3-12 in Sarasota and Manatee counties.
- Development of an original work by noted director and choreographer Jessica Lang as the Virginia B. Toulmin and Muriel O'Neil Artist in Residence.

# KEY PROVISIONS OF A CHARITABLE GIFT AGREEMENT



By: **Betsy Pennewill, JD**,  
General Counsel for  
Community Foundation of  
Sarasota County, Inc.

Most nonprofit organizations will agree that a “perfect gift” is an unrestricted gift which can be used for any purpose. An unrestricted gift does not limit the organization to any restriction on the amount that can be expended or limit the purpose for which the gift may be used. During a pandemic or a natural disaster, such as a hurricane, unrestricted gifts are paramount in keeping nonprofits in business until our communities and the economy return to “normal”. When an unrestricted gift is conveyed, a detailed charitable gift agreement is not necessary, unless the donor wishes to have a level of recognition for the gift which must be spelled out clearly, as discussed below. Substantial gifts, those \$100,000 or more, will typically have restrictions as to the purpose for the use of the gift which triggers the need for a well-written charitable gift agreement. Most of today’s donors making significant gifts seek more control over their gifts, thus causing the necessity to discuss and document in detail the terms of the gift.

A well-drafted charitable gift agreement has the following provisions:

### 1. **Identify the Parties to the Gift Agreement.**

The names of the donor and nonprofit organization must be spelled correctly, and the parties should discuss whether the name of the donor can be recognized in the manner the donor desires. Further, identifying the correct name of the charitable organization is important so there is no confusion

as to who is to receive the gift, especially with a testamentary gift which will happen at a later point in time after the donor’s death. A professional advisor who drafts a charitable gift agreement should conduct the necessary due diligence to verify that the legal name of the entity is correct in the relevant documents. The formal name of the organization, as identified on the IRS 990 tax return, the EIN number, and city and state where the organization is operating are good ways to ensure the organization has been identified correctly. Also, a discussion must take place among the parties as to how the donor’s name should be recognized – whether their formal name, a nickname or including the family foundation’s name must be determined.

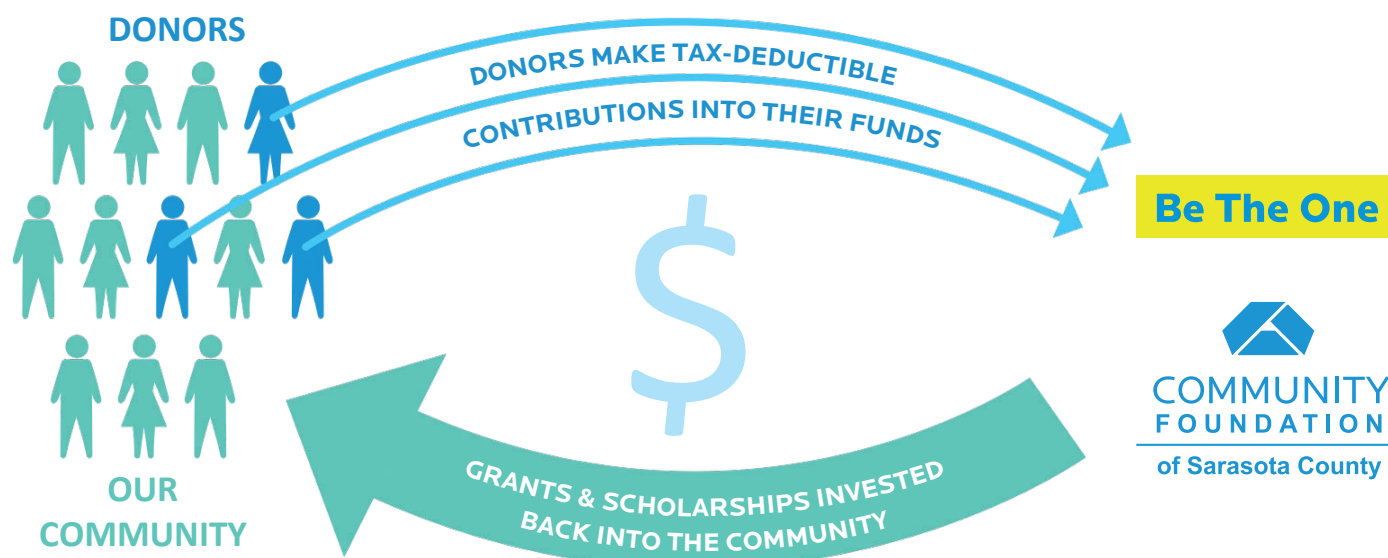
**2. Amount of Gift.** The entire amount of the gift should be stated and the timing of the payments of the gift should be discussed among the parties and documented in the gift agreement. A donor may wish to pay a percentage of the gift initially and have additional payments made when milestones are reached for the purpose of the gift. Language should also be written to address what happens if the gift is not completed prior to or at the death of the donor and whether the gift shall be binding upon the estate of the donor.

**3. Purpose of Gift.** The purpose of the gift needs to be carefully discussed among the parties, and restrictions spelled out clearly in the gift agreement for the donor to avoid conflict with the IRS’s rules on deductibility of the charitable contribution or create obstacles that impede the benefits of the gift to the nonprofit organization. Providing scenarios for both the best case (purpose can be met completely) and the worse case, with an alternative use (purpose cannot be met as stated, but an equal value will be

attributed to the donor's gift) are important to discuss and written into the gift agreement to determine the outcomes for these scenarios. A key element in crafting a gift agreement is the consideration of future changes in circumstances. What happens if a disaster occurs or substantial circumstances change for the nonprofit organization. A donor may wish to have language that requires the nonprofit organization to use insurance proceeds to rebuild the building and put the donor's name on the rebuilt facility as it was prior to the disaster. Language should spell out whether the gift is fully expendable or to be held in an endowment. Discussing what happens if the charitable purpose cannot be met is important and whether the nonprofit should hold the gifted assets in a separate account throughout the term of the gift until the purpose has been met. These items, as well as alternative uses for the gift should be addressed in the charitable gift agreement. Further, alternative solutions for use or recognition of gift must be documented if full payment is not made to the organization.

**4. Recognition of Gift.** The parties must discuss whether the donor desires publicity of their gift or do they wish to have anonymity. The charitable gift agreement should address the nonprofit organization's right to use the donor's name and image to promote the gift and publicize such gift during the organization's capital campaign. A donor may wish to reserve the right to revoke the organization's use of their name and/or image.

**5. Naming Rights.** Most substantial gifts are recognized by naming rights at the location of the building of the nonprofit organization. If a donor wishes to have their name on a building, then the location of the name, the size of the letters, the material used in the signage, and whether a government permit must be obtained to hang a sign or name should be discussed among the parties and documented in the charitable gift agreement. The donor should ask the nonprofit organization to provide a rendition of the naming recognition as an exhibit







Community Foundation of Sarasota County's Jay Young, Vice President of Philanthropy and Betsy Pennewill, General Counsel with Sam Donaldson, Professor of Law Georgia State University, and Susan Hines, Sabal Trust.

in the gift agreement before it is executed by the parties. Further, it is important for a gift agreement to address both the future obsolescence of the project and the charity's obligation if the honoree's subsequent actions or reputation later tarnish, rather than enhance, the reputation of the charity. Nonprofit organizations also may wish to term out naming rights. All of these issues must be spelled out clearly in the gift agreement.

**6. Standard Contract Terms.** While charitable gift agreements are generally drafted to reflect the gratuitous nature of the transaction, it is important to have standard contract provisions to avoid unnecessary uncertainty and expense for both the donor and the nonprofit organization. The governing law, merger clauses, indemnification of the parties, and how an amendment or modification to an existing agreement is made must be discussed in the gift agreement.

Today's donors who make significant contributions to nonprofit organizations often retain control over the purpose of their gifts. While donors may impose reasonable conditions that can be carried out by the nonprofit organization, changes are inevitable. Changes in the organization's operations and leadership, changes in the economy, changes in the needs of the beneficiaries served, and changes in the law all affect the charitable purpose for the use of the funds contributed. Discussing and documenting the provisions above help set forth reasonable expectations for the parties and their heirs and successors. Considering the long-term use of funds and having broad language which allows the nonprofit organization to pivot the charitable purpose of the gift when necessary, helps prevent defeating the benefits intended by the donor in making the gift to the nonprofit organization. 🏠



# Charitable Gifting Strategies



## Gifting Appreciated Stock

Gifting appreciated stock that has been held for more than a year allows a donor to deduct the full fair market value on the date of the gift while avoiding paying capital gains tax. The gift may be contributed to a donor advised fund, which can be used over time to support nonprofit organizations and charitable causes they care about.



## IRA Required Minimum Distribution Gifts

A donor may consider contributing an IRA gift to the Community Foundation of Sarasota County to create a fund to benefit certain named organizations over a period of time for much needed support or to create a scholarship fund to provide educational support to individuals. An individual may contribute up to \$108,000 from his/her traditional IRA if they are 70½ or older. The donor will not receive a charitable deduction. However, the amount contributed will not be recognized as income to the donor.



## Real Estate Gifts

A donor may gift appreciated real estate to the Community Foundation of Sarasota County. There are certain tax benefits available to a donor, provided they convey or “gift” the property to the foundation before accepting a contract in writing from a third-party buyer. The real estate proceeds may benefit a donor advised fund to be used over time to support nonprofit organizations and charitable causes the donor cares about. The donor will be responsible for getting a qualified appraisal no earlier than 60 days from gift.



## Business Owners

As a business owner, exit planning can be a daunting task. In many cases charitable planning can play a powerful role to avoid taxes, provided it is considered at the onset of conducting the due diligence to seek potential buyers. A donor advised fund created at the Community Foundation of Sarasota County to accept an assignment of a donor's business interest could serve the dual purpose of providing immediate tax benefits at the time of the business sale while providing the flexibility to the donor to give to causes they care about for years to come.

If you have questions about the various types of assets to consider gifting, please feel free to contact **Betsy Pennewill, JD**, General Counsel, and **Jay Young**, Vice President Philanthropy, at **941-955-3000**.

## Profile: The Patterson Foundation

# A COLLABORATION STRENGTHENING PEOPLE, ORGANIZATIONS, AND COMMUNITIES

Dorothy Clarke Patterson never considered herself ultra-rich, even after inheriting a fortune rooted in the Chicago Tribune upon the death of her husband and high school sweetheart, Jim Patterson, in 1992. She was determined to share her wealth with charitable causes throughout Sarasota, where she and Jim had retired more than a decade prior.



Dorothy Clarke Patterson

Dorothy outlined the mission of The Patterson Foundation with a strong, yet open approach to philanthropy that mirrored the way she lived her life. In binding the Foundation to an unfettered charter, Dorothy ensured that it would operate without any constraints to a specific issue or region — imbuing it with the flexibility, opportunity, and responsibility to be imaginative in philanthropy that makes a meaningful impact.

Upon Dorothy's passing in 2007, she bequeathed \$178 million in assets to The Patterson Foundation for use in fulfilling its philanthropic mission — a number that has nearly doubled today, despite giving more than \$170 million in charitable donations. Since 2010, the Foundation has remained committed to strengthening people, organizations, and communities in ways that foster wide participation around shared quality-of-life aspirations.

## A Trusted Partner in Meaningful Philanthropy

As its philanthropic mission launched, The Patterson Foundation was mindful to not reinvent the wheel or assume how best to make an impact. Rather, it sought partners with expertise in meaningful philanthropy and a proven track record of making a difference.

In the Community Foundation of Sarasota County, The Patterson Foundation has had a trusted, values-driven collaborator since its inception, forming a unique partnership between a private endowed charitable entity and a public foundation.

"Regardless of what cause a person is passionate about, the Community Foundation's expert team can help them strengthen organizations and opportunities to make a meaningful difference throughout our region," said Debra Jacobs, president and CEO of The Patterson Foundation. "Our collaboration has afforded The Patterson Foundation with an abundance of opportunities to work in ways that would not be possible otherwise and create outsized impact."



Debra Jacobs. *Courtesy of The Patterson Foundation.*

“Creating opportunities for people of all ages, means, and backgrounds to learn the impact they can have is one of the wisest investments a funder can make” — Debra Jacobs

## Strengthening Opportunities to Give

Joined in their shared belief that everyone can be a philanthropist, The Patterson Foundation has worked alongside the Community Foundation on ways to help more people discover, own, and act on their generosity. This has manifested in support for existing Community Foundation funds, both through direct contributions and donation match challenges.

Take Season of Sharing, for example. This support has helped propel the fund from raising \$1.5 million in 2010 — The Patterson Foundation's first year of involvement — to raising \$7.19 million in 2025, safeguarding thousands of families and individuals across the Suncoast. This record-breaking total from the 2025 campaign includes a \$1 million gift from The Patterson Foundation made directly to Season of Sharing in response to Hurricane Milton and an additional \$1 million total through 10 separate \$100,000 contributions activated by donors.

That same spirit of strengthening our inherent generosity has helped the Giving Challenge grow since 2012, when the community donated \$2.4 million to nonprofits in Charlotte, DeSoto, Manatee, and Sarasota counties. In the years since, The Patterson Foundation's no-cap match for this opportunity has significantly strengthened the biennial 24-hour event. In 2024, donors leveraged this opportunity to raise \$17.2 million — one of the most impactful giving days in the entire Southeast.

"Creating opportunities for people of all ages, means, and backgrounds to learn the impact they can have is one of the wisest investments a funder can make," said Jacobs. "The enthusiasm we've witnessed in each giving opportunity demonstrates how eager our community is to have a hand in shaping a stronger future that benefits all of us."

## Investing Toward Shared Aspirations in Perpetuity

The Patterson Foundation works to generate meaningful impact that touches future generations. The Community Foundation has provided effective avenues that achieve that aspiration through its




Roxie Jerde stands next to Debra Jacobs, President and CEO of The Patterson Foundation, during the kickoff to the 2018 Giving Challenge. *Courtesy of the Community Foundation of Sarasota County.*

stewardship of several endowments supporting The Patterson Foundation's philanthropic initiatives and goals in perpetuity, including:

- **Providing** unrestricted funds to maintain Season of Sharing as an effective resource for neighbors helping neighbors
- **Connecting** teachers, administrators, and parents to curriculum-aligned experiential learning opportunities for students through EdExploreSRQ
- **Maintaining** Patriot Plaza, the ceremonial amphitheater at Sarasota National Cemetery, while providing educational tours and programs teaching visitors of all ages the true meaning of service and sacrifice
- **Ensuring** that asset-limited students have the resources they need to be productive and engaged in learning through the Student Emergency Fund

## Honoring Our Collaboration

As our region evolves, The Patterson Foundation is grateful for the Community Foundation's continued efforts to connect with more givers and strengthen the impact of their generosity. As Jacobs puts it, "They are an invaluable conduit to the people, organizations, and communities contributing to the vibrancy of the Suncoast." 



## CELEBRATING THE LEADERSHIP OF PRESIDENT AND CEO ROXIE JERDE

When it was announced last spring that Roxie Jerde, President and CEO of the Community Foundation of Sarasota County since 2011, would retire on June 30, 2025, many naturally wanted to recall her arrival and accomplishments.

Roxie's path to the Community Foundation began at a time when the hiring committee would select only the second CEO in the Foundation's history following the 22-year tenure of Stewart Stearns – a notable force among community foundation leaders.

After a few phone calls, the candidate from Kansas City made her way to Florida for in-person meetings and tours – even though Roxie admits she wasn't exactly sure where Sarasota was located within the state. Roxie walked through the door of our Fruitville Road offices somewhat casually dressed and explained with her signature smile that the airline had lost her luggage. Clothes did not make the man – or woman. The way Roxie took the challenge in stride and plunged into her vision for the foundation instantly won the hiring committee over. In March 2011, Roxie and her husband of now 48 years, Mike Jerde, put down roots in Sarasota County.

### Rooted in Community

Over the next 14 years, Roxie caringly guided the Community Foundation to its greatest potential yet. Under her visionary leadership, the Foundation grew to an extraordinary \$544 million in charitable assets and now manages nearly 1,600 funds. Among her many achievements, Roxie is most proud of doubling the number of donors partnering with the Foundation for community good and significantly growing the

assets – particularly endowment funds – that ensure perpetual support and strengthening of the community.

Roxie's leadership has always been steered by a commitment to listening to the needs of the community. In 2012, Roxie recognized a need to make our area's nonprofits more accessible and visible. The Giving Partner was born: an online searchable nonprofit database of 800 local nonprofit organizations that contributes to the quality of life in our community.

Another indispensable tool for understanding arrived at the latter part of her tenure. The Community Indicators Dashboard, launched in 2022, offers reliable statistics that helps inform decisions that can guide charitable giving to a greater impact.

### Empowered Through Collaboration

While innovative in her thinking, if you've had the opportunity to meet Roxie, you'll know that her true magic rests in her ability to form and sustain meaningful relationships. It's through these partnerships and personal relationships that the Community Foundation initiatives have flourished.

Initiatives like the Giving Challenge, an online giving day that has raised more than \$92 million in unrestricted funding through nine challenges for our local nonprofit community, with nearly \$37 million of that total coming from The Patterson Foundation in matching dollars and donor incentives since inception a dozen years ago.



Roxie has also overseen some of the most impactful community driven campaigns like Season of Sharing, which provides emergency financial assistance to help individuals avoid eviction or utility shutoffs when unexpected crises strike. This past year, the need for Season of Sharing was amplified by the damage caused by Hurricanes Helene and Milton, which arrived within less than two weeks of one another, including a direct hit on Siesta Key. The community responded generously, raising an unprecedented \$7.2 million through the campaign—marking the highest total in its 25-year history. This total includes support from both individual donors and major contributions from The Patterson Foundation, the Brian and Sheila Jellison Family Foundation, Hugh and Eliza Culverhouse, and the Baltimore Orioles.

In 2022, after Hurricane Ian made landfall the Community Foundation in partnership with The Patterson Foundation founded the Suncoast Disaster Recovery Fund (SDRF). SDRF has raised nearly 10 million since its inception. In 2024, the fund expanded

its mission to support broader recovery beyond Ian's damage, responding to new storms and the growing need for sustained recovery efforts.

## Leadership with Heart

There's no denying that Roxie occupies rarefied air. She is the leader whose prudent fiscal savvy and deep knowledge of our community has been a North Star. All these important achievements, and still, one of her gifts is her down-to-earth sensibility. As most of you know, when she talks to you, she makes you feel like you're the most important person in her world.

Roxie will be the first to tell you that the friendships, the shared dreams, the moments of challenges and success are the treasures that she will carry with her. And though she may be retiring, her heart will always be with our Community Foundation, cheering on her successor, the third CEO of our Foundation in 45 years. 🏡

# LEADERSHIP

## BOARD OF DIRECTORS

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Amanda Suits, *Coordinator, Marketing and Events*  
Sumitra Sankarasubramanian, *Data Analyst*

### Newsletter Contributors

Betsy Pennewill, JD  
Branan Jacobs, MagnifyGood  
Lori Liggett



*Save the Date!*



Presented by the  
Community Foundation of Sarasota County

**APRIL 15-16, 2026**  
NOON to NOON

**Celebrating the 10th Giving Challenge**



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