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Marilyn Thompson



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.

LETTER FROM OUR BOARD CHAIR AND PRESIDENT/CEO

Dear Friends:

Just as galaxies illuminate the night sky far beyond what a single star can do, in the past few months, the people of our community have demonstrated just how bright we can shine when we come together for a unified vision.

We just celebrated our ninth Giving Challenge, in which 53,305 donors showed their support for 724 nonprofits through taking part in the 24-hour online giving event. With matching funds provided by our friends at The Patterson Foundation, our friends and neighbors raised \$17.2 million in a single day for our robust nonprofit community.

That success came on the heels of a stellar Season of Sharing campaign. Once again, our community stepped up to raise \$4.2 million to help neighbors in need, an effort that again was bolstered by The Patterson Foundation's \$700,000 match (\$100,000 for every \$500,000 raised by the community).

While those campaigns affirm our community's commitment to the nonprofits that enhance our quality of life, our Community Foundation also hosted the third regional 2Gen Summit in February, a convening celebrating the practitioners, nonprofits, donors, and parents whose combined efforts have fueled our region's 2Gen approach to creating intergenerational prosperity for more than 12 years. Read details of the Summit (page 4) to learn more about the ideas and rationale behind this strategy.

The Summit was an opportunity for our Community Foundation to publicly introduce our Community Indicators Dashboard. The dashboard, which is available to the public for free, is a comprehensive, interactive collection of statistics and a powerful resource. The story 'Heart & Head – Lives & Data' on page 12 offers insight on how to use it and why this tool will propel our mission further and inform strategic charitable giving.

A major theme of the 2Gen Summit was the importance of collaboration, and we are fortunate as a foundation to have many community partners that help us make a difference. One partnership we're proud of is as old as our foundation itself, our exclusive community partnership with the Sarasota County Bar Association, detailed on page 8. Of course, we cherish the partnerships we have with our individual donors, too. These kindhearted and generous people entrust our foundation to help them carry out their vision of a brighter future. Learn about Claudia Barnett (page 10), affordable and fair housing advocate, whose core belief that everybody deserves a place to call home has shaped her action and philanthropy for decades.

Speaking of partnerships, we are grateful for yours! Thank you for Being The One to help create transformational change in our community, making it better for all who call this region home. Each of us adds a star to form the totality of our community's constellation of caring.

Wishing all of you a bright summer,

Marilyn Thompson, Board Chair

Roxanne G. Jerde, President and CEO

THE FOREVER PROMISE OF A 2GEN APPROACH

There’s an old saying:
“A parent is only as happy as their
least happy child.”

For many, this sentiment rings true as an illustration of the interdependency of parents and their children, cementing the notion that parent and child well-being are inextricably connected.

It stands to reason, then, that the most effective way to propel families out of instability is to support them holistically and concurrently, with a focus on the needs of children and the adults in their lives that’s simultaneous and intentional.

This is the basis of the 2Gen (Two-Generation) Approach that has been at the root of our Community Foundation for more than a decade. In February, the foundation hosted the third regional 2Gen Summit to explore creating systemic change that interrupts intergenerational poverty by supporting whole families.

Held at Florida Studio Theatre, the Summit convened practitioners, nonprofits, donors, parents, and policymakers to examine current local and out-of-area programs that support a 2Gen approach. National experts from Ascend at the Aspen Institute and five of their Fellows shared ways to expand existing human services, education, and cultural programs into an integrated and coordinated effort that puts families at the center of the work of our dynamic nonprofit community.

While conventional interventions for vulnerable families often focus on either children, with educational supports, or adults, with social service support, the 2Gen approaches intentionally consider the whole family together to provide wraparound services and opportunities for self-development that lead to economic and social asset building.

“When you empower families, you provide the opportunity to achieve their potential and create a foundation that can be built upon through generations,” said Roxie Jerde, President and CEO of the Community Foundation. “It is magical to witness the transformation that families can make when supports are offered to parents and their children simultaneously and with the intention to achieve educational success and financial stability.”

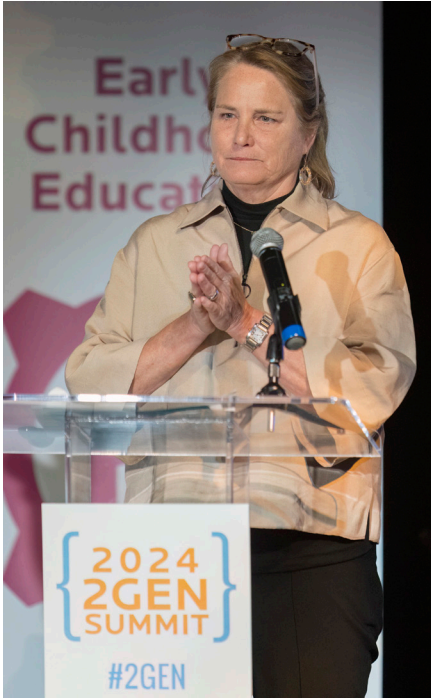
Since 2012, the Community Foundation of Sarasota County has partnered with Ascend at the Aspen Institute, a catalyst of the 2Gen approach and a convener for diverse leaders working across systems to build intergenerational prosperity and well-being. In that time, the Community Foundation invested nearly \$90 million in 2Gen strategies.

At the Summit, national experts in whole-family support systems delivered content and facilitated panel discussions with local Sarasota and Manatee County practitioners of 2Gen programs, along with local parents who have benefited from—and now lead—2Gen opportunities.

These parent leaders and the insight they offer was enlightening at the Summit and the basis for a new grant cycle that was announced that day: the Parent Leadership Grant cycle. Intended to encourage the inclusion of voices of those who have lived expertise, the grant invites nonprofits to center parent voices through creating Parent Advisory Councils, opening board leadership opportunities to parents, conducting training specific to understanding the day-to-day dynamics of parents seeking a better life, and more.

The Need is There

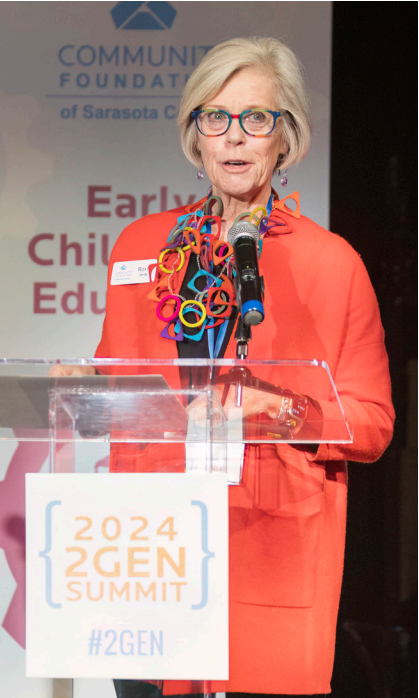
At the Summit, the foundation presented its new Community Indicators Dashboard, a new tool that offers third-party data on critical indicators of well-being (education, housing, health and economic



Anne Mosle, Founder and Executive Director, Ascend at the Aspen Institute



Cedric Hameed, Spoken Word Artist



Roxie Jerde

strength) from reputable sources through graphs and charts that allow visualization of trends and projections. The dashboard allows for a deeper understanding of where needs exist and how factors of well-being are interdependent, providing philanthropists and practitioners with information that’s vital to formulating strategies for disruption. (See page 12 for more about the Dashboard)

Currently, in Sarasota County, 52 percent of students enrolled in public schools, or 26,520 children, qualify for Free or Reduced-priced Lunch; and 38 percent of all households in Sarasota County live at or below the ALICE (Asset-Limited, Income-Constrained, but Employed) threshold, meaning that nearly 75,000 families in the county struggle to afford necessities like housing, transportation, utilities, and childcare.

Further, 33 percent of Sarasota County households are rent-burdened, defined as spending more than 30 percent of their income on housing. The crisis of affordable housing, already crippling too many families, stands to expand as the county’s population is projected to increase by 40,000 people by 2031.

Back to Basics

The notion of empowering families as a means of building strong communities is not new; the link between individual and collective success has been recognized around the globe for centuries. But a systemic approach to whole family development, along with the term “2Gen,” took root in the 1980s, and re-emerged in the early 2000s, building momentum as a solution to shifting economic, demographic, and social realities.

“The research is clear that the top predictors of a child’s academic and financial success later in life are their parents’ income and education level,” said Kirsten Russell, Vice President of Community Impact at the foundation. “It makes sense to focus on parents as an integral part of helping children reach their full potential. The Summit is designed to help us take the great work the community has already accomplished to the next level.”



A session about rethinking education included voices of teachers from early childhood to adults, in both traditional settings and unconventional ones.

The Community Foundation’s commitment to 2Gen approaches is evident in initiatives focused on strengthening families through education, economic support, health and well-being, and social capital.

Initiatives since 2012 address the six components of 2Gen:

- **Early Childhood Education:** A foundation of success starts with the earliest years. Since 2012, **Summer Learning Academies**, founded by Joe and Mary Kay Henson at Alta Vista Elementary school, free summer camp-like programs held at public schools that provide academic support and meals for students, have boosted youngsters’ kindergarten-readiness and overall academic achievement while enabling their parents to work with no cost burden or disruptions. The **Strauss Literacy Initiative** has provided professional development for teachers in the science of reading as well as tools to identify and intervene with reading challenges such as dyslexia. A partnership with the **Early Learning Coalition of Sarasota County** has provided access to technology

and weekly coaching sessions to evaluate and enhance teacher child interaction, specifically in language. The data collection measures early literacy skills of beginning readers.

- **K-12 Education:** **EdExploreSRQ** provides access for all students to hands-on, experiential learning opportunities, and the **Student Emergency Fund** helps students facing economic crisis attain items and services necessary to their education like glasses, shoes, clothing, food, transportation and more.

Thanks to many generous donors, our community foundation is a leading regional provider of **scholarships** based on need for both high school graduates and “adult” students returning to school age 24 and older. Recognizing the needs in the community for sustaining support, in recent years, many scholarship opportunities through the foundation are renewable. Further, acknowledging that pursuing education as a parent comes with unique needs, like childcare and help

with navigating other life expenses, implementing a **Parent Success Program** has been key to the Community Foundation’s 2Gen strategy.

- **Social Capital:** While individual motivation is critical to progress, collective input is often key to the most successful outcomes. Social capital—the networks of trusted relationships that enable society to run effectively—is a necessity. Through Parent University, a component of Summer Learning Academies, and cohort-based educational opportunities, parents have an opportunity to meet with other like-minded people that can form bonds that build social capital. The Parent Education Navigator is a role initially funded by the Community Foundation, now a position supported by Sarasota County Schools, that helps parents navigate the complex system of resources as they re-imagine their possibilities.
- **Economic Assets:** Shifting economic realities are placing stability further out of reach for many families—nearly 40 percent of single-parent Sarasota County households are rent-burdened. Investments in affordable and workforce housing, such as **Lofts on Lemon** and **Family Promise of**

South Sarasota County Parkside Cottages, have enabled affordable, dependable, and safe housing for many families. The enduring safety net **Season of Sharing**, which in 24 years has distributed over \$38 million to more than 50,000 families, has covered one-time expenses, like rent or mortgage, utilities, and other necessities so that families can rebound from economic setbacks. Beyond assisting when family budgets are tight, 80 percent of the nearly 300 parents enrolling in college or post-secondary programs funded in part by the Community Foundation of Sarasota County have completed their programs, leading to an average family wage increase of \$7,000 a year.

- **Health, Including Mental Health:** With one in six adults in Sarasota County living without health insurance, the need for affordable and accessible healthcare is dire. The Community Foundation has partnered with several nonprofits delivering quality healthcare and counseling services to parents, families and children—either free or based on ability to pay—such as **The Florida Center of Early Childhood**, **Forty Carrots Family Center**, **Samaritan Counseling Services**, **NAMI Sarasota-Manatee**, **Children First**, and more.🏡



Marjorie Sims facilitates a discussion with Dr. Raquel Hatter of The Kresge Foundation and John Annis of the Charles & Margery Barancik Foundation. During the discussion, Hatter noted that systems are created by people, people have the power to change them.

PARTNERSHIP IS KEY: THE COMMUNITY FOUNDATION OF SARASOTA COUNTY AND THE SARASOTA COUNTY BAR ASSOCIATION

AMANDA R. KISON, SARASOTA COUNTY BAR ASSOCIATION, 2023-2024 PRESIDENT

Throughout history, many famous duos have emerged that just seem destined to be paired up—think Bert and Ernie, Butch Cassidy and the Sundance Kid, Buzz Lightyear and Woody. These pairs have endured as iconic in large part because of the way they complement one another.

That complementary relationship is one that defines the partnership between our Community Foundation and the Sarasota County Bar Association (SCBA). It is a relationship borne of providing excellent estate planning counsel based on trust, good judgment, and deep expertise.

An Origin Story: Creating Community Connectivity

The Community Foundation was founded by several professional advisors, including key estate planning attorneys in the late 1970s, when the notion of bettering one’s community gained steam. At the time, philanthropists struggled to connect with nonprofits absent an entity that could bring them together. The Southwest Florida Estate Planning Council recognized this need and established the Community Foundation of Sarasota County in 1979.

Ron Skipper, of the law firm Fergeson Skipper and longtime Sarasota County Bar Association member, was one of the seven individuals who founded the Community Foundation. David Steves (longtime SCBA member) and Chip Gaylor (past SCBA president and longtime member), both of Muirhead, Gaylor, Steves and Waskom, served as Board Chairs for the Community Foundation and have been significantly involved with the foundation’s growth throughout the years. While both Skipper and Steves have retired from their careers,

their vision and deep commitment to the foundation’s mission carry on and have been central to the strong relationship between the Community Foundation and SCBA.

To this day, estate planning attorneys look to the Community Foundation to assist their clients who wish to create charitable legacies through their estate plans. Clients who elect to establish a legacy fund with the Community Foundation are ensured expert oversight by the foundation in stewarding the client’s charitable intent, which includes a close working relationship with the nonprofit sector that benefits from the client’s charitable gift. These relationships, and the deep knowledge the Community Foundation has of nonprofits and community needs and trends, ensure thoughtful, strategic investments that provide long-lasting impact.

Seeding a Bright Future: Scholarships to Law Students

In 2007, a generous donor created a fund, the SCBA Richard R. Garland Diversity Scholarship Fund, to benefit law students who intend to practice law in Sarasota County. Not only does the scholarship fund provide vital scholarships to aspiring legal professionals, it also supports summer placement in law firms or government agencies in Sarasota County for these students. It may also benefit a graduating high school senior of the Booker High School Law Academy who has been accepted into an accredited college or university.

Over the years, many SCBA members have contributed to this scholarship fund, and since the fund’s inception, \$150,000 has been granted. Nearly 30 law school students have benefited individually by receiving up to a \$5,000 scholarship and have also obtained an



Booker High School Law Academy graduates Sebastian Martinez (c/o 2021), a community organizer, and Nora Mitchell (c/o 2023), who currently attends Harvard University. Nora was a recipient of the Richard R. Garland Diversity Scholarship.

internship/clerkship in Sarasota County during the summer between the student’s second and third year of law school. Eight Booker High School Law Academy students have benefited individually by receiving a \$1,000 scholarship.

In addition to the Richard R. Garland Diversity Scholarship Fund, the SCBA also has four other charitable funds held with the Community Foundation. Two are donor advised funds, which provide the SCBA with flexibility in making charitable grants to nonprofit organizations located in Sarasota County on behalf of its members. There is also a SCBA Diversity and Inclusion Fund to support and benefit initiatives of the SCBA, which has awarded \$5,550 in grants since its inception in 2019.

The fifth fund was created to honor former Executive Director Jan Jung for her outstanding service to the SCBA. The Jan Jung Fund to Promote the Study of Law in Sarasota Schools was established to support projects or initiatives in Sarasota elementary, middle, or high schools, public or private, that promote law-related education or careers.

Recipe of Reciprocity

Just as the SCBA holds funds with the Community Foundation to support the future of civil society in our region, our Community Foundation also provides support to the SCBA.

In 2015, the Community Foundation became a Platinum sponsor of the SCBA, and that support has grown over the years. In addition, the Community Foundation has been the premier event sponsor for much of the SCBA’s signature programming or events, including the Barrister’s Ball.

Also, since 2006, the foundation has offered a three-part Distinguished Speakers Series each year, providing CLE credits and an opportunity for local professional advisors to network and learn from nationally renowned experts in estate planning, trust administration, and tax planning. These speakers travel to Sarasota to present on current wealth, estate, charitable and tax planning trends and topics.📍

Profile: Claudia Barnett

A HEART NEEDS A HOME

Claudia Barnett remembers the first place she truly felt at home. In truth, her address was in the small town of Leonia, New Jersey. But her heart was at home in New York. Specifically, her grandparents’ Sacandaga summerhouse in the Adirondacks. What she loved most about it was the sense of connection.

That feeling of stability and the comfort of connectivity have shaped her aspirations since those youthful summers. As an adult, Barnett devotes her efforts to helping others realize the joys of a secure home. Before that, though, coming of age in the 1960s, a complex world beckoned her curiosity and sharpened her sense of social justice.

Across the Universe

As a teenager, she spent a lot of time in New York City with friends, listening to The Beatles and developing a worldly perspective.

At 16, her mother sent her to Paris for the summer to study at The Sorbonne. “She wanted my sisters and me to be ‘citizens of the world.’ She was a traditional housewife, but these were transformative years,” Barnett said. “She wanted more for us.”

Inspired by her love of travel, history, and culture, Barnett enrolled at American University in Washington, D.C., to study International Service. On a post-

graduation visit to Italy, she met a U.S. diplomat who captivated her. Within months they married, and enjoyed years of adventure overseas.

Eventually, they settled back in Washington, D.C. and had a child, Alex. She began working with real-estate agents as a freelance writer. One of the agents told her she’d make a great realtor. That’s when Barnett started her career in home sales.

A Roof of One’s Own

She was quickly connected with a developer who worked with historic properties, sparking her interest in preserving historic properties as well as new construction in historic districts, eventually forming her own business, Preservation Development Company. Her business acumen, historical knowledge, and curiosity propelled her career, as new opportunities emerged for her and her organization.

In 1991, as the country endured a crippling recession, Barnett came close to losing everything, facing economic ruin when the banks collapsed. At the same time, her husband left her, further crumbling her foundation.

Her expertise in real estate collided with her interest in social justice in the early 1990s, when she became aware of groups protesting a large homeless shelter that was to be built in a wealthy district near a local children’s recreation center.

Barnett aligned herself with advocates of people experiencing homelessness, stunned that so many people were living in the streets in the exclusive neighborhood. She got to know the mostly women who had fallen on hard times and began to realize how thin the line was between prosperity and poverty. She co-founded the Community Council for the Homeless and Friendship Place D.C., ultimately creating a separate housing organization, Community Housing Trust (CHT). With a \$1,000 grant and Seller financing, CHT purchased its first home just before Christmas 1994.

‘He’s My Ringo’

Barnett’s advocacy continued through the mid-90s, when the economy strengthened, but prices remained low, enabling the purchase of properties that became

permanent housing to homeless mentally ill adults in the upscale neighborhood.

“We met “nimbyism” head on and succeeded in bringing our homeless neighbors home,” she said.

She also began dating again. Jack Barnett was Associate Deputy Assistant Secretary for the U.S. Dept. of Housing and Urban Development. Their common interests catalyzed instant connection. The two had been on a few dates before he invited her to a party where he was playing drums.

“I said to myself, ‘yep, he’s my Ringo.’”

The couple moved to Sarasota, purchasing a 1926 Historic Landmark built by friends of John and Mabel Ringling, which they restored. Both philanthropists, Jack’s focus is arts, and hers remains affordable housing and social justice.

“The Community Foundation is the gold standard,” she said, noting that the expertise of the Community Foundation team can help her realize her vision.

Beyond her philanthropic investments, including All Faith Food Bank, Barnett donates her talents in supporting affordable and special needs housing. She is a Fair Housing advocate and board member at Second Heart Homes, a nonprofit providing housing and support.

She recalled the story of a woman whose husband’s death drained her income. After being evicted, the woman lived at The Salvation Army for two years before taking up residency in Second Heart Home’s first women’s home.

“As soon as she was settled, she got a job,” she said. “All she needed was a safe place.”

Barnett’s work comes at a time when, in Sarasota County, 30 percent of households are rent-burdened, and an additional 544 people are documented as homeless.

“Sarasota needs to build more affordable housing, not just for homeless people,” she said. “Workforce housing is necessary, too. It’s important for the health of this community to create affordable options.”



Claudia Barnett’s fair and affordable housing advocacy has been a beacon of hope for many struggling with poverty and mental illness.

CFSC: HEART & HEAD – LIVES & DATA

Think back to school and how you learned best. Did reading literature make you feel connected to historical figures or new ideas? Was it the fine tuning of equations that left you satisfied? Or perhaps a combination of the two – combining facts, figures and experiences that helped knit together big ideas?

Sometimes we learn best through personal stories. Other times empirical evidence holds sway. Both modes are important.

Whichever fuel accelerates changes in human understanding and behavior is what matters most to us at the Community Foundation.

Over the last two years we have invested in new tools and opportunities to bring together those two ways of thinking. Most recently we developed a free, public dashboard to provide a larger, strategic view of our region that can illuminate how we could grow and work together to make our community a place where everyone can thrive.

“We are using the information from the dashboard to inform our own operations and inject a curiosity that gets us to a place of data-informed decision making,” said Mischa Kirby, Vice President, Strategy and Communications. “We are also sharing this powerful tool with nonprofit organizations to assist in more wholly demonstrating why their missions are so important, and individuals and families are able to assess community needs and trends to to inform their charitable giving.”

The addition of the Community Indicators Dashboard builds on the foundation’s long history of gathering and sharing information to guide charitable giving. Another free platform the foundation provides the community is The Giving Partner (www.thegivingpartner.org), a centralized nonprofit directory that is a trusted resource for philanthropic research for grantmakers and other

entities. This searchable database contains more than 700 profiles of charitable organizations serving Sarasota, Manatee, Charlotte and DeSoto counties. Each profile reflects an organization’s commitment to transparency, including programmatic results, leadership, financial health and more.

How to Use the Dashboard

The Community Indicators Dashboard is organized into five main sections that provide insights into the key aspects that shape our region of Sarasota, Manatee, Charlotte and DeSoto counties.

The interplay of population, education, economic, health, and housing indicators are shown through data-mapping visualizations and engaging narratives. Users can compare nearly 60 indicators county-by-county, and in some cases by ZIP codes, as well as view those data points against state and national trends. The information presented throughout the dashboard is from credible, third-party, open-source agencies and is updated when new information is provided by those agencies, such as the US Census Bureau, the U.S. Department of Housing and Urban Development (HUD), the Florida Department of Education, Florida Department of Health, and the Bureau of Economic Analysis (BEA).

Some examples of information available in this single platform include:

- Projections for nursery or preschool needs through 2031
- A review of wages by industry, by county, based on a person’s place of residence
- Details about teen vaping and adult drinking patterns
- Multiple variations to understand the complexities of housing costs, including rental and ownership trends by the neighborhood level

“For decades, our foundation has made use of data in many forms to inform charitable giving. The powerful, searchable dashboard brings us forward in our ability to identify funding priorities and continue to develop high-leverage strategies. We offer it to the community, promoting transparency and accountability, to ignite conversation about how we can work together to create and sustain a stronger community.”

– Roxie Jerde, President and CEO of the Community Foundation

“For decades, our foundation has made use of data in many forms to inform charitable giving. The powerful, searchable dashboard brings us forward in our ability to identify funding priorities and continue to develop high-leverage strategies. We offer it to the community, promoting transparency and accountability, to ignite conversation about how we can work together to create and sustain a stronger community,” said Roxie Jerde, President and CEO of the foundation. “We also hope this is a tool that media, government, and civic and business groups can call upon as a trusted resource.”

As part of our commitment to listening to our community to inform the foundation’s work, we are developing a series of smaller group discussions about key issues revealed more completely through the dashboard. We hope those verified statistics and trends will motivate others to take action, or at the very least to become a bit more curious about the many facets of our neighbors.

“Philanthropic motivations have long been connected to personal stories of those served through nonprofits. By uniting our knowledge about community needs with the heart-centered understanding that comes from those who share their lives and hopes and dreams, we can invite many more hands to join us in building community-led solutions to improve the lives of all who live here,” Kirby said.

To express your interest in taking part in data-informed discussions, email data@cfsarasota.org

INSIGHT:
Five Sarasota Statistics that
Might Surprise You

- **38%** of Sarasota County households live at or below the ALICE threshold (Asset Limited, Income Constrained, Employed households with income above the federal poverty level, but below the basic cost of living).
- **25%** percent of residents over the age of 16 are below the poverty threshold, yet working.
- **33%** of households in our community are rent burdened.
- **More than 50%** of students attending our local schools qualify for free and reduced lunch (another measure of families living too close to the poverty level).
- **50%** of area middle and high school students report feeling chronically sad or depressed.



View the full **Community Indicators Dashboard** at www.cfsarasota.org/knowledge-impact/community-data-tools-reports

LEADERSHIP

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—2024—

GIVING CHALLENGE

Be The One

Presented by the
Community Foundation of Sarasota County

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53,305 DONORS
SUPPORTING
724 NONPROFIT ORGANIZATIONS
SERVING SARASOTA, MANATEE,
CHARLOTTE, AND DESOTO COUNTIES

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