The Community Foundation of Sarasota County has been identified as a national leader among community foundations for overall impact on the community and donor satisfaction according to an independent third-party that evaluates philanthropic funders for effectiveness.

The Center for Effective Philanthropy (CEP) ranked the Community Foundation in the top 99th percentile for overall donor satisfaction and impact on the community after conducting a 2019 Donor Perception Report that compared local results with CEP’s broad dataset of nearly 10,000 donors from more than 70 community foundations across the United States.

Throughout the in-depth survey, donors who partner with the Community Foundation described the organization and its leadership as effective, trustworthy, and responsive, with more than 90% of respondents stating they would recommend its philanthropic services to others. Donors also highly ranked the Community Foundation’s strong understanding of community needs, viewing it as a key resource for information, advice, and guidance.
Dear Friends:

There are moments in our lives that will remain with us. Something unexpected or an important milestone that changed your life for the better in some way. Some moments we never forget are the ones in which someone, maybe even a complete stranger, showed us kindness. No matter what, their generosity is something we hold on to in our memory.

Since 1979, the Community Foundation has seen that kindness from others. Starting with our founders, members of the Southwest Florida Estate Planning Council (who you can read about on page 10), whose kindness and dedication are built into our culture. To us, they are an example of selflessness with a desire to better the community by creating a resource to connect donors to community needs.

Of course, we also see this example of kindness in our donors. People who have true passions and interests, driven by a sense of altruism. People like you — who welcome us in partnership to ensure your generosity. Our donors continue to inspire us every day.

While it is hard to narrow down the highlights and memories we cherish from our history, one community-wide initiative that stands out is Season of Sharing. For 20 years, Season of Sharing has been how generous donors make acts of kindness that help families keep what matters most to them: their homes. See page 12 to read more about the lives that were touched while preventing homelessness.

Helping a neighbor also means showing them a sense of belonging and worth. That is what scholarships do for students. It is one of the most buoying gifts, giving a student the confidence to know they have the potential and power to change the world. The history of our scholarship program, which today provides almost $2 million a year, is chronicled on page 8.

The Community Foundation takes pride in our partnership with our donors, and what has been accomplished in the community. Thanks to our wonderful donors, we have been identified as one of the best Community Foundations in the nation to work with (see callout on page 2 of our survey results from the Center for Effective Philanthropy). It is humbling to know that we can make an impact not only on our community, but also on each person that walks through our door.

We hope you enjoy reading about the acts of kindness and generosity we’ve seen throughout these past 40 years. Kindness comes in many forms, including donating time, giving a helping hand, and providing opportunity, all of which frames our history and partnership with you.

Gratefully,

Nelle Miller, Board Chair

Roxie Jerde, President and CEO
The 1980s: Establishing Connection and Priorities

The Community Foundation was first orchestrated by an Estate Planning Council donation, a committee of volunteers, and an office in the back room of the West Coast Symphony. The objective of this decade was to improve the quality of life as the community saw needs appear. Getting into hands-on community involvement, the first grant initiative helped identify street addresses and numerically label houses in Newtown. After the Salvation Army had an unexpected rise in needs, the Community Foundation stepped up to provide aid. Mote Marine’s Jason Project, an educational deep-sea discovery, was one of many examples of the Community Foundation’s developing interest to support culture and science. Thanks to Richard Curcio, the first scholarship fund was created and awarded to Venice High students. Betty and Alex Schoenbaum gave a gift to the Community Foundation which helped to print brochures and organize a marketing campaign. After growing success, Stewart Stearns was hired as the first Executive Director who later helped to ring in the “electronic age” by loaning the Community Foundation his son’s Tandy Computer.
The 1990s: Uncovering Deeper Needs

The 90s were a time of developing trust and showing Sarasota County that residents could look to the Community Foundation as a resource. So, in addition to traditional grantmaking, the Community Foundation’s leadership sought out other ways to help. For example, after reading about a burglary at St. Vincent de Paul Society’s food pantry, Stearns created an emergency fund to bring relief to families before Thanksgiving arrived. This reactive response demonstrated a sensitivity to community needs and expressed a culture of collaboration.

As its commitment to the community expanded, the Community Foundation was looked to as an entity that could address issues that weren’t largely recognized. Funds were given to a variety of needs including the Ear Research Foundation, a nonprofit that provides hearing aids to children whose families cannot afford them. Notably during this time, Sarah Greer Mayer, who greatly valued literacy and helping the disadvantaged, provided one of the largest gifts that opened a children’s library in Newtown. Projects including the Women’s Legal Fund, Nurturing Dad’s Initiative of Children First and the Parenting Initiative of the late 90s were early ideas of the Two-Generation Approach, a method that we apply today, which believes to help a family is to help a child.

The 2000s: Strategic Planning for Philanthropy

Diane McFarlin, editor of the Herald-Tribune, suggested a partnership with the Community Foundation after expressing great concern around homelessness in Sarasota. An idea grew into a program that could help families avoid homelessness...
Community: Our History of Giving

by providing funds to aid a variety of needs such as rent, mortgage assistance, utility bills, and childcare. Season of Sharing was born, developing connections between organizations to focus on homelessness prevention. By building off individual programs that were established in the 90s, the Community Foundation looked closer into the Two-Generation Approach with Connecting Fathers and Families, an initiative helping fathers learn parenting skills, bringing them closer to their children. Jo Bowen Nobbe gave the Community Foundation its largest donation of $17 million which propelled future giving towards education and scholarships. Recognizing the unmet needs of the elderly, grants were provided to organizations like the Senior Friendship Center with continued funding for healthcare programs. The 2000s closed with a developed understanding of family needs across all ages and collaborating in unique ways to find solutions.

The 2010s: Culture of Caring

This decade ushered in a culture of philanthropy by taking new approaches to integrate charitable work. Under the guidance of Roxie Jerde, the new President and CEO, the Community Foundation jump-started the Giving Challenge, inviting everyone to become a philanthropist. In just the first year, it raised $2.4 million for 109 nonprofits. Today, six challenges have raised over $40 million in donations. Continuing to help families, the Community Foundation supported the Alta Vista Elementary School summer program and nursing program for single mothers, providing

The 2000s: Strategic Planning for Philanthropy

As trust within the community grew, the Community Foundation established firmer roots, building a permanent space in 2004 with the help of Leila Gompertz (left). Partnerships further connected the Community Foundation with opportunities to tackle even larger challenges, such as preventing homelessness through Season of Sharing (center) and building capacity for our nonprofit partners (right).
opportunities through education. As the lead Grade-Level Reading organization in Sarasota County, our collaboration with Suncoast Campaign for Grade-Level Reading and Embracing Our Differences use children’s literacy and creative strategies to promote diversity, increasing success in the classroom. By 2015, over 70 scholarship funds were supporting 575 students and adult learners in Sarasota. New and unique collaborations were created when the Community Foundation helped the Humane Society purchase dog food to be delivered by All Faith’s Food Bank for low-income families with pets. With collaborations that travel across the sector, the Community Foundation has built strong relationships that work deeper to make our community stronger.

Looking Ahead

The Community Foundation of Sarasota County will continue to evolve as the needs of the community and the hopes of our donors do. Although the future is unwritten, the Community Foundation is a place that has been dedicated to serving the community and building connection, and it will always strive for a better tomorrow for all.

Philanthropic work allows us to shape our own society by giving to the common good. The 1970s was a decade of “pivotal change” and members of Sarasota County sought to better their community.
Education can be a crucial aspect to bettering society. Affording higher education, however, can be a challenge for some students who dream of degrees that promise them the tools they need to achieve their dreams.

The Community Foundation of Sarasota County has been working with donors since 1986 to establish scholarship funds for deserving students to provide opportunities for furthering their education. The first scholarship fund the Community Foundation received was from Richard Curcio of Venice. Mr. Curcio established the scholarship for Venice High School students honoring his father, Sam A. Curcio.

Since then, almost 90 scholarship funds have been established at the Community Foundation and now each year nearly $2 million is awarded in scholarships.

The opportunity to give others a way to “pay forward” one’s success is the uniting passion that guides our donors who work with the Community Foundation to establish a scholarship, no matter their background or experience. Roland Abraham grew up in the Great Depression era and dropped out of college when he couldn’t afford tuition. In 1992, he created the Emily and Roland Abraham Education fund, determined to make sure no other student found themselves in a situation like his. Abraham hoped to live long enough to see his vision come to fruition.
help 1,000 students get through college. He was able to see 963 students helped when he passed in 2011. Today, his scholarship has helped over 1,100 students afford higher education.

As expenses related to higher education have increased, the scholarships provided through our donors have also evolved. Today, many scholarships place greater emphasis on completing a degree and holistic student support, rather than simply supporting freshman year expenses.

Two examples of this are the lela D. Jackson Foundation scholarship and the Bogner Family scholarships.

In 2015, the lela D. Jackson Foundation Scholarship was able to help Evelyn Fragoso, a high school student working to raise her child while attending class. Fragoso wanted to create a better life for her daughter and herself, and she believed higher education was the pathway to that dream. She tutored other students in math and maintained a high GPA. Her hard work paid off, and the scholarship was able to help her pursue her degree in nursing.

Daniel Lopez had big dreams for his future. He wanted to go work for Tesla after attending college. However, being diagnosed with narcolepsy and losing his stepfather made school life challenging. Slowly transitioning back into public school routine, Lopez kept his heart set on Embry-Riddle and a career at Tesla. His hard work and determination were recognized, and the Bogner Family Scholarship was able to help Lopez attend his dream school in 2017.

The Community Foundation also provides scholarship options for adult learners who may want to go back to school.

Eva Crossman grew up overseas but returned to the United States with her family when she was 23. She watched as her parents struggled without having a college degree and knew she wanted to have a career that aligned with her passion. With the help of the Community Foundation and the scholarship she received, Eva was able to attend college. Today, she strives to make a difference and improve the quality of healthcare.

Now with 33 years of scholarship recipients connected through the Community Foundation, we see generational return in our community. Many previous scholarship awardees return to help review applications for students following in their footsteps. Former board member and financial advisor Orion Marxa, a graduate of Venice High School and the University of Florida, is one such recipient, as is Colton Castro, a graduate of Sarasota High School who went on to earn a law degree from the University of Florida with support of a Community Foundation scholarship. Castro today is an Estate Planning attorney with Williams Parker.

“The scholarship I received as a second-year law student provided the opportunity to gain invaluable experience, propelling me to build my career in Sarasota and give back to the community”, says Castro. The Community Foundation and the Sarasota County Bar Association Diversity and Inclusion Council continue to be part of my life as I work to pass along the inspiration and value that was so generously given to me.”

The generosity of one person to another has the power to change lives. For students, these scholarships change their lives by giving them an opportunity they might not have been able to attain on their own. Our students are our future, and with the support and kindness of others, the possibilities of what they can accomplish are endless.
In the late 1970s, Burt Bershon, a local businessman, wanted to find a way to organize charitable giving in Sarasota County. Bershon had seen over the years the good that came from donations made throughout the area, but he felt the region would benefit from a more strategic plan for philanthropy.

Bershon familiarized himself with community foundations, which had existed in large cities across the United States since 1914. Bershon knew it was what Sarasota needed to bridge the gap between individuals and causes who both nobly wanted to work toward benefitting the community. Bershon turned to J. Ronald Skipper, an estate planning attorney and then president of the Southwest Florida Estate Planning Council (SWFEPC).

As the long-established group that provides guidance and expertise in estate and wealth planning, the SWFEPC was best positioned to help jump-start the area’s first community foundation. With a membership roster of lawyers, trust officers, CPAs, Certified Financial Planners, endowment professionals, and chartered life underwriters, council members were the best resources to give legal, tax, financial, and charitable advice to clients.

Knowing the SWFEPC was not designed to manage the intricacies of the charitable wishes of its members’ clients, the Council’s members formed a committee in 1978 to discuss building a similarly well-respected entity to provide expert charitable advice.
“I thought it was a great idea and would be beneficial to the community...the community foundation could be an organization that would encourage and accept gifts from the public to benefit and impact Sarasota County,” Skipper said. “It was a group of professional advisors, members of the Estate Planning Council, who held these charitable trusts created for their clients. These advisors didn’t have the knowledge or time to find the right nonprofit organizations to give their client’s donation to. Creating a community foundation to handle donations and connect them to nonprofits seemed like a perfect solution and future partnership.”

Within a few months, the Community Foundation of Sarasota County was founded. The Board of Directors consisted of nine members including board members from the Council. Bershon served as chairman and the committee members consisted of Skipper, Ward Dahlgren, Donald Griswold, Gordon Smith, Russell Natherson, John Shea, Sr., Michael Dorman, and Ralph Fensterwald.

These founding board members built the foundation from nothing — no office, no staff, no money. But their commitment as volunteers was greater than any bank account balance. The first step after establishing the Community Foundation was to build an asset base, a challenge that is still appreciated by the Council today.

Those first few years of trying to get off the ground, build momentum, and create a culture of giving was extremely hard. I can only imagine how hard it was for this group to get together and essentially fundraise,” said Kim Bleach, Senior Vice President and Private Client Advisor of Bank of America Private Bank, and current President of the Council.

As a new foundation, it was crucial to find a way to guarantee to donors that their charitable gifts were going to be properly cared for and serve the greatest good. Within the first few years of existence, the board focused on ensuring that the Community Foundation was an organization that donors could trust.

“It was extremely difficult because people weren’t interested in contributing to an organization that had just gotten started and had very little assets. Once we reached the five million-dollar level, I think that gave people comfort in knowing that we were someone they could trust, and the organization was going to thrive.” Skipper said.

The Council continued in the early years to function as the Community Foundation’s guiding sponsor. All work undertaken by the Council was done through the generous time of these members. They knew to be truly successful, however, the Community Foundation needed a leader to guide executive-level decisions. They convinced Lester Kurth to take on the position of Executive Director part-time and without a salary, which was a strategic decision that propelled the Community Foundation to its next incarnation. Within its ninth year, the Community Foundation had $235,000 in total assets and was able to hire Stewart Stearns as its first paid executive director.

The Community Foundation of Sarasota County and Southwest Florida Estate Planning Council continue to work in partnership today, with the Community Foundation being the resource for charitable trusts and community needs, and the Council and its members providing prime financial and estate planning advice to clients. As an acknowledgement to its origins and a nod to the professional advisors who refer their clients, the Community Foundation hosts several continuing education programs for professional advisors throughout the year.

According to Bleach, the legacy of the Council and the founding Community Foundation members demonstrates that philanthropy is more than money and numbers: it is about selflessness and the desire to strengthen the community.

“Sarasota County is incredibly philanthropic. It’s part of what makes our community so wonderful,” Bleach said. “I believe that people are moving into our area because they are drawn to how our community interacts. While our area is constantly evolving, what hasn’t changed is how the Community Foundation of Sarasota County does such a fabulous job of connecting donors with the dollars they are giving back to our community.”

Kim Bleach
Even in our vibrant, active community that repeatedly ranks high on national lists for quality of life, there is a gray cloud looming over low-income families who call our region home: homelessness. As parents work long hours for multiple jobs — including many in the hospitality industry — paying the bills, putting food on the table, and providing for their children can be a daily challenge. It only takes one emergency or unexpected expense for these families to face losing their home. Sarasota County has six times the national average percent of homeless men and women, according to the Department of Housing and Urban Development. That number is still growing; and families are the fastest growing demographic that make up the homeless population.

Unfortunately, the trend isn’t new. Two decades ago, Diane McFarlin, former publisher of the Herald-Tribune, recognized that the threat of homelessness in Sarasota and the surrounding counties was an issue deserving attention that needed to be addressed in a different way.

The Community Foundation and the Sarasota Herald-Tribune created “Season of Sharing,” a now 20-year-old annual campaign with the purpose of helping families of Sarasota, Manatee, Charlotte, and DeSoto counties stay in their homes, avoiding homelessness. By raising funds to distribute among local nonprofits, neighbors can assist neighbors to avoid homelessness by helping pay utility bills, rent, food vouchers, childcare, and other related expenses.
“We have a serious problem here [with] homeless families. It is an issue that, really, the root causes are very deep,” McFarlin said in 2001 when describing the Herald-Tribune’s push to produce a series that encouraged the public to educate themselves on this issue and become part of the solution.

Since 2000, this program has provided more than 20,000 recipients a desperately needed safety net. Most of these families supported through “Season of Sharing” do not receive aid from government funding because they are still working, however, many of the jobs these parents work do not pay enough for them to be able to support their families or pay for emergencies when they occur.

“It is the fact that our income level for service workers is so low here, and we don’t have enough affordable housing. But the purpose of this fund is while we deal with these deeper and broader issues, we need emergency money”, McFarlin said when “Season of Sharing” was first established.

“Season of Sharing” receives donations of all sizes, and every one of those donations matter because every donation makes an impact, from $2 to $200,000. In this past year, “Season of Sharing” surpassed its goal of $2 million in donations, and during the last 20 years, more than $21 million has been raised. The Community Foundation does not charge any fees for accepting and distributing gifts through our nonprofit partners like Catholic Charities, United Way, Friendship Centers and many more. Partners ensure 100% of gifts are distributed to those in need.

“As a near-lifelong resident of this region, ‘Season of Sharing’ always brings a warm feeling to my heart when it rolls around each year, but it is an important effort far beyond the emotions it engenders. It simply makes good economic sense: it costs eight times more to put a family back into housing after they have lost their home than heading off that catastrophe,” said Matthew Sauer, executive editor and general manager of the Herald-Tribune and a board member of the Community Foundation of Sarasota County. “What I also love about the program — from both an emotional and financial standpoint — is that people rarely come back for additional money, and some of them actually pay it forward by becoming donors themselves. But the unfortunate truth is that there is always additional need, and that is why the Herald-Tribune remains committed to this very important initiative. “Season of Sharing” is yet another example of the power of journalism to change people’s lives in our community.”

Some of the stories told across the years through the Herald-Tribune include:

ANTONIO was a kid abandoned by his father and other relatives. He struggled living on his own and finding food to eat. With determination, he found his way to the YMCA’s Transitional Living Program where he was given the resources to find work and attend high school. When his time there came to an end, Season of Sharing funds were able to help him afford his apartment while he continued into higher education. Antonio went on to become an anesthesia technician at Sarasota Memorial Hospital.

TASHA, a single mother of two, needed help after having to take in her brother’s three children when he began to struggle with drug addiction. Season of Sharing was able to provide her with aid, so she and the five children could live in a house together.

ANGEL struggled to raise her two children on her own after no longer receiving child support from the children’s father and rent and car insurance costs increased. Season of Sharing was able to help her stay in her home after being rejected by government programs because she was working.

In 2012, to ensure there would be future funds, The Patterson Foundation and Community Foundation established the Diane McFarlin Season of Sharing Endowment Fund in McFarlin’s honor. This fund currently holds a balance over $1 million.

Join us in celebrating 20 years of helping families avoid homelessness by donating today. You can donate online or by check to Community Foundation of Sarasota County Season of Sharing Fund, 2635 Fruitville Road, Sarasota, Florida 34237. Contact the Foundation at 941.955.3000 for more information. All donations are 100% tax-deductible. Thank you for your generosity.
LEADERSHIP

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40 YEARS OF COMMUNITY IMPACT

COMMUNITY FOUNDATION
of Sarasota County

2635 Fruitville Road | Sarasota, FL 34237 | 941.955.3000
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COMMUNITY CARE

Caring for our community means being a resource during challenging times. We are proud to respond to Emergency Needs & Disaster Relief and initiatives around Preventing Homelessness, that address Health & Hunger issues, provide care for Animals & the Environment, and assist with Placemaking through housing, transportation, and economic support.

EMPOWERMENT & SUCCESS

A successful life is one filled with purpose. What that looks like for each of us differs, but the paths to reaching one’s greatest potential are common to all of us. We invest in Education, Academic Enrichment, Career Development, Scholarships & Mentoring, and opportunities to create Lifelong Connections so that everyone can be empowered to realize their dreams.

BELONGING & CULTURE

To have a place or group where you belong inspires passion and creativity. By supporting organizations whose work Bridges Generations and Unites the Community around Cultural Development & the Arts, we are here to help build the community we all want to live in.
SAVE THE DATE
GIVING CHALLENGE
April 28th and 29th, 2020
Noon to Noon

Since 2012, donors from throughout our region have shown their love for local nonprofit organizations by providing more than $40 million in unrestricted funding through six Giving Challenges to support their missions.