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Roxie Jerde and  
Richard Gans

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## LETTER FROM OUR BOARD CHAIR AND PRESIDENT/CEO

Dear Friends:

In our fast-paced world, instant gratification is the norm. We have appliances, social media tools, and even movies all with the word “instant” (or the shorthand of “insta”) that are leading our popular culture. A review of Google Trends shows that in the last decade, use of the word “instant” is now at an all-time peak in popularity. And what of its opposite, “long-term”? That phrase is used much less often these days.

This brings to mind the classic parable of “The Tortoise and the Hare.” We are taught as young children that fast is fun, but consistency is the key to success. That maxim holds true for much, but in the realm of driving community change through philanthropy, there is room both to go fast and to go slow, and for a tempo in the middle.

In this issue of our newsletter you will read about donor-supported initiatives that are designed for lasting change, but that have been quickly put into action so that immediate needs – in this case the mental health needs of area students (see page 12) – could be addressed when immediate assistance was required.

The Community Foundation of Sarasota County has one-by-one established multi-generation programs in partnership with arts, cultural and scientific institutions across the region (see page 4). These programs reconnect families with experiences they may have been forced to leave behind because of loss of income, health concerns, or other hardships. Each of these programs is steadily growing from the seeds planted some time ago, and they constantly evolve to adapt to the changes in the families they serve and in our community.

All of these investments in our region are possible thanks to our donors for whom both meeting acute needs and promoting long-term change is a passion. On page 10 we share the story of one couple whose careful planning and commitment to children’s literacy will positively help local students and school systems for generations to come. Because it is important to many of our donors that their children and grandchildren share their commitment to philanthropy, we touch on ways to start family conversations about charitable giving and making a difference in the lives of others (see page 8).

We hope you will enjoy reading about the opportunities that philanthropy is powering throughout our community, both today and for generations to come. We are here to listen and help all in the greater Sarasota community to realize their ability to “be the one” to impact another person, a cause, and our community.

Gratefully,



Richard R. Gans, Board Chair



Roxanne G. Jerde, President and CEO





The Ringling's "Where Everyone Belongs" (WEB) program offers free family-level museum memberships to families.

## Community: Connecting Families

# CONNECTING FAMILIES WITH CULTURAL RESOURCES

Our region abounds with opportunities to explore culture, nature and art. But many low income families never have the opportunity to experience and learn from the community's rich resources.

That's why several years ago, as the Community Foundation of Sarasota County focused on supporting families across multiple generations, it was important to help develop and expand initiatives to open the doors of many of the area's educational attractions to children and their parents or guardians who might not otherwise have the means to visit them.

A prime example is The Ringling's "Where Everyone Belongs" (WEB) program, first piloted in 2016 and launched publicly in 2017, which offers 800 free

family-level museum memberships to at-risk families funded over four years by the Community Foundation. Parents are welcomed to the museum and assisted in making the most of their family's visits.

To identify families for the program, The Ringling works with many non-profit groups including Easter Seals: Project Rainbow/Kids Night Out, a respite program for caregivers of disabled children; Forty Carrots: Partners in Play, a free parenting skills program at local libraries; Visible Men Academy, a Bradenton Title I charter school; and Harvest House: Home Again, a program for families transitioning out of homelessness. Ana Juarez, Barancik Community Engagement Fellow, presents art enrichment projects at the nonprofit locations and offers free museum

memberships to participating families. Those families are invited to the museum for programs that provide educational tools for visiting the museum, ensuring an enriching parent-child museum experience.

"The program's main focus is to give underrepresented families a chance to discover their state art museum," says Juarez. "For a lot of the families, it is the first time they have stepped foot into any art museum, period." As a result, a key goal is to make families feel comfortable so they will keep coming back. "We strive to make them feel welcome and let them know it is a space for them where they can be safe and learn something new in a fun, exciting way," Juarez says.

The program's two-generation approach is key. "Engaging both the child and the caregiver in the learning process is vitally important to break that poverty cycle," she adds.

The Ringling hopes WEB will be a model for cultural institutions nationwide, so it is focusing on data collection to demonstrate its effectiveness. The data

tracks how often each family visits the museum over the course of a year, what programs they attend and surveys the parents' comfort level with museums and knowledge of engagement strategies before and after they participate.

### **A key goal is to make families feel comfortable so they keep coming back.**

The Community Foundation also provided funding to Marie Selby Botanical Gardens to pilot its Family Togetherness Program in 2017. The Gardens welcomed 1,200 children and parents who received free admission to family-friendly events that first year.

Designed to give children from Title I schools and their families a chance to immerse themselves in nature, this year the program expanded thanks to additional Foundation funding. It offers complimentary entry to several family-friendly events including Spooktacular, held in October; Lights in Bloom, the Gardens' popular nighttime holiday event; and Family Saturdays in Paradise, which features outdoor children's art activities during the *Gauguin: Voyage to Paradise* exhibition.



The "Family Togetherness" program at Marie Selby Botanical Gardens welcomes families to special events like "Lights in Bloom" throughout the year.

## Community: Connecting Families

The families are identified by school administrators and nonprofit organizations including Girls Inc., Unidos Now, Visible Men Academy and Brotherhood of Men. Additional funding for Family Togetherness is provided by Tervis and Michael and Marcy Klein.

To gift the experience of live theater in a family-friendly environment, the Community Foundation of Sarasota County works with Asolo Repertory Theatre in support of its Family Days programs with funding which offers discounted tickets for matinee performances of full-productions both in summer and during holiday break. A focus of Asolo Rep's board, the performances have included "Twenty Thousand Leagues Under the Sea" and "Jungle Book." In addition to special funds dedicated by the Asolo's board of directors, funding for Family Programs at Asolo Rep is provided in part by Publix Super Markets Charities and The Koski Family Foundation.

Another avenue for family enrichment is EdExploreSRQ, which aims to enable all Sarasota County schoolchildren to engage with the area's arts, cultural, and science institutions by making their educational opportunities easy to find on one website. Launched in 2011, EdExploreSRQ is best known for helping teachers identify and apply for funding field trips and in-classroom presentations that relate directly to their curriculum and state educational benchmarks. For students, such experiential learning motivates them to learn, helps them understand and apply concepts and creates new interests. The free website provides information on more than 250 explorations available from nearly 70 organizations and teaching artists, with grants available to fund experiences.

EdExploreSRQ also helps parents enrich their children's lives and enhance their education. Parents can find information about active learning experiences available at local museums, theaters, performing arts and science venues, and parks, as well as intellectually-stimulating summer camps and kid-friendly activities.



Asolo Repertory Theatre hosts "Family Days" productions each summer, introducing families to live theater productions in the historic theater.





Parents can find information about active learning experiences at local venues like Mote Marine Laboratory through [EdExploreSRQ.com](http://EdExploreSRQ.com)

“For many of our lower socio-economic group students, EdExploreSRQ offers an opportunity to connect to a community resource they haven’t been to before through a school trip,” says Angela Hartvigsen, Sarasota County Schools fine arts program specialist and manager of EdExploreSRQ. “Afterwards there is a higher likelihood that parents will be interested in taking a family trip there.”

To encourage that, EdExploreSRQ.com is promoted in print and online newsletters sent to parents, and younger students get an “I’m an EdExplorer” sticker to wear on explorations, which organizers hope will prompt questions from parents and encourage them to find out more.

EdExploreSRQ is a partnership between the Community Foundation, The Patterson Foundation, the Science & Environment Council of Southwest Florida, the Arts & Cultural Alliance of Sarasota County, Education Foundation of Sarasota County, and Sarasota County Schools. Visit [EdExploreSRQ.com](http://EdExploreSRQ.com) to learn more.

“If you want philanthropy to continue on through your family, there are some very specific steps to take now to ensure goodwill continues on in your name for causes you care about.” – Richard Gans

## Philanthropy: Strategic Giving and Generational Wealth Management

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### MULTIGENERATIONAL LEGACY GIVING

Recently, a number of studies and reports have predicted trillions of dollars to be transferred between generations over the next 30 to 40 years as Baby Boomers age and begin to involve their families in charitable giving. While predictions about the amount of money to be distributed have greatly varied, and some financial analysts have doubted the potential impact, there is no denying that a generational shift is coming and that anyone concerned about their legacy of charitable giving should be discussing their wishes with their loved ones.



Richard R. Gans

“To have made a living commitment to charitable giving demonstrates a high regard for the place you call home and the people you count as neighbors,” said Richard R. Gans, Shareholder and Past President of Fergeson Skipper Attorneys at Law and Chairman of the Board for the

Community Foundation of Sarasota County. “If you want philanthropy to continue on through your family, there are some very specific steps to take now to ensure goodwill continues on in your name for causes you care about.”

Gans recommends grandparents and parents discuss with younger family members why they choose to support causes in the first place, and what their philanthropic goals are.

“Sometimes these conversations reveal assumptions each generation has about important factors in family philanthropy. You have to start at the beginning, and not take for granted that your wishes are entirely understood,” Gans says.

From there, each family can develop activities to engage other generations.

“One idea could be to host an annual family meeting and assign grant amounts to the next generation to manage, with some reporting due back to the family leaders,” Gans says.

This can be easily accomplished through a Donor Advised Fund (DAF) which allows for immediate giving with some flexibility as interests evolve with each generation or family member.

“Typically, families working with DAFs want to help their communities, work with other donors to tackle persistent problems, and get their children involved in a lifetime of giving,” says Roxie Jerde, President and CEO of Community Foundation of Sarasota County. “This idea of “giving while living” is often one of the best ways for a family to see the impact they can make together for a specific cause or the greater community.”



Roxie Jerde





Betsy Pennewill

As for timing of when to bring in other family members, that is a highly personal decision. At the Community Foundation of Sarasota County, Betsy Pennewill, Corporate Counsel, advises families to weigh a series of questions when planning their next steps of adding family members to the decision-making process.

First, examine if the next generation has the financial knowledge needed to help guide decision making.

"We can be part of those discussions and offer tools and guidance on best practices for what to look for in a non-profit to ensure your gifts have the greatest impact," Pennewill says.

Sometimes, even with financial acumen and knowledge about causes, generational philanthropy can encounter difficulties if family members simply don't have the same charitable interests. In such cases donors can make gifts of endowed funds to be managed by a community foundation for continued good, but under the advisement of the foundation. These funds can be designated for specific non-profit organizations, or for a general "field of interest" such as children's literacy or no-kill animal shelters.

"Ultimately, a donor's wishes are the final word in how they want to make a difference in their community," Jerde says. "We just help you find the way to have the greatest impact in ways that meet each family's needs."

**“We can be part of those discussions and offer tools and guidance on best practices for what to look for in a non-profit to ensure your gifts have the greatest impact.”**

— Betsy Pennewill

**While each family's goals are unique, broad topics that should be discussed early in family discussions include:**

### **Philanthropy Philosophy.**

Is your charitable style that of an investor [want to see returns], passive [cause-led], or collaborative [crowd-funding]? Answers to these questions can help form a family's charitable mission statement.

### **Decision-Making Structure.**

Is your goal a "shared experience" between generations, or will sharing of giving decisions be limited? Will you make decisions as a group? If yes, how do you set up governance and decision-making guidelines?

### **Communications Style.**

Generational communications preferences vary greatly. Determine how you will communicate with deadlines in mind. A conversation with one person could be the beginning for one family member and seen as a final solution for another. It is best to define the terms of how family members will come to agreement.

## LEGACY GIVING

### THE IRA AND PATRICIA STRAUSS FUND FOR CHILDREN'S LITERACY

During 47 years of married life, Ira and Patti Strauss built three homes: a beach house in Fire Island, New York; a farm in Schooley's Mountain, New Jersey; and another beach home on Boca Grande, a barrier island on Florida's Gulf Coast just south of Sarasota County. Repeatedly described as a "lovely couple" by many who knew them, these New Jersey natives had a zest for life.

Ira's passions included sports cars, especially English and Italian models, particularly Lamborghinis. Through his love of cars, Ira enjoyed life in the fast lane.

Patti, on the other hand, was always a bit shy, partly due to her dyslexia and a learning disorder. With Ira's help over many years she was able to largely overcome the challenges she found as a student and young woman. Patti's hobbies included knitting and needlepoint, her book club and animals, and later her daily walk through the village or along Boca Grande's beautiful beaches.

"They were very detailed, thoughtful and hardworking," says Michael White, a Senior Vice

President-Financial Advisor with RBC Wealth Management, who knew the Strausses for more than 20 years and worked as their financial advisor in New Jersey. "Both did things the old-fashioned way, researching and teaching themselves."

The opportunities for the Strauss' abundant life came about largely from Ira's brilliant business mind. Along with two others, in 1969 he started Webcraft Technologies, a printing company in New Jersey. In 1971, the company created a system for printing pamphlets and envelopes simultaneously, revolutionizing the industry. Webcraft was acquired by Big Flower Press in 1996 (a NYSE-listed company with sales in excess of \$1 billion at the time).

While busy with work, Ira and Patti always found time to enjoy the world around them and share it with others. White remembers taking his children to their home on Schooley's Mountain, where his kids could chase their pet llama, Delaney, around the yard.

Without any children of their own, the Strausses decided to create a lasting impact for children with



learning disabilities, as Patti had been helped during her life. In planning their estates, the couple decided to work with the Community Foundation of Sarasota County, based on the foundation's focus on families and education, and reputation.

Indeed, today, nearly 3.5 percent of American students — slightly more than 2 million children — are in need of special educational services for a reading disorder, such as dyslexia. Overall, more than 40 million Americans are dyslexic, nearly 15% of the population.

Dealing with this tremendous problem is the goal of the Ira and Patricia Strauss Fund for Children's Literacy. This \$23 million dollar-plus endowed fund was created to help children of all ages obtain the skills and support needed to read proficiently for their age, with a primary focus on children with dyslexia or other obstacles to the development of their reading skills.

The fund was established in 2017 with the assistance of Ric Gregoria, president of Williams Parker Harrison Dietz & Getzen, and Michael White. Both men were confidants of Ira and Patti, and had socialized with the couple for many years.



Ric Gregoria

As Ira's health began to fail, the Strausses leaned on Gregoria to offer guidance on estate planning and contract oversight. When Patti, however, was diagnosed with cancer, she called more heavily upon Gregoria to be the person "who will take care of my Ira."

The couple eventually moved to Golden Gate Point in Sarasota so Ira could be set up in a caring environment close to Gregoria and other friends in preparation for Patti's passing.

"Ira and Patti Strauss were a truly devoted couple," says Gregoria. "They loved and cared for each other immensely. It was an honor to work with them for so many years and I was incredibly touched when they decided to move from Boca Grande to Sarasota to be closer to me as I oversaw their day-to-day affairs and, ultimately, their estates," he adds.

Patti died of cancer in 2015 and Ira lived on comfortably, just as Patti had intended, with help from a guardian and additional guardianship counsel.

"We had set up the life that Patti wanted him to have," Gregoria says. Ira had a cook and often went shopping at Brooks Brothers, as he always liked to be dressed to the nines. "Anytime we had to make a decision for Ira, I would make sure that the choice was what Patti would have wanted," he adds.

Ira passed away on April 18, 2018.

Ira and Patti were devoted to making a difference in the community and thoughtfully left a gift which will positively impact children with learning disabilities, among other worthy causes, for years to come.

The fund's future is secure, as when Ric Gregoria passes, his colleague Colton Castro will become advisor to the fund, along with Michael White and his partner, Tom Collins.



Colton Castro

Mike Kennedy, Senior Vice President of Community Investment for Community Foundation of Sarasota County, notes that the foundation is working to ensure that the donors' intent with this fund is fully realized.

"The Community Foundation of Sarasota County is honored to steward the Strauss' passion for children of all ages receiving a quality education through the development of reading proficiency," Kennedy says. "In order to enrich the lives of young people who experience dyslexia and other reading challenges, we are working with experts to develop the strategy for the greatest impact."



Mike Kennedy

Kennedy added that the Community Foundation has begun researching best practices and innovative strategies and analyzing current programs already available in the community, in order to establish both short-term and long-term goals, ensuring that the legacy of Patti and Ira Strauss is just as they intended.



## PILOT PROGRAM SHOWS EARLY SUCCESS WITH IN-SCHOOL MENTAL HEALTH SERVICES

A promising pilot program funded by the Community Foundation of Sarasota County providing in-school mental health services at one Title I elementary school is serving as a model for Sarasota County Schools.

The idea started with a social worker at Alta Vista Elementary School, where the Foundation had an ongoing relationship, looking at the best ways to address the needs of a school where most students live in poverty. The social worker had frequently referred students to off-site mental health providers, but found that often the referrals went unused. Cost, transportation and the stigma associated with mental illness were barriers to parents following through on the referrals. For the children whose parents did follow through, Medicaid limited sessions to 50 minutes per week.

To make services more available and utilized, Alta Vista brought in a mental health clinician from the Florida Center for Early Childhood to work with students at school.

“When we heard about this program at Alta Vista, we called The Florida Center to begin a dialog,” says Kirsten Russell, Director of Community Investment for the Foundation. They learned that if the Foundation partnered with The Florida Center, providing additional funding, the students would not be limited to 50 minute sessions and the mental health clinician could do home visits, invite parents in, have small group sessions and work with teachers and school staff to provide targeted support to the students.

“We wanted to do a full-fledged pilot to track data and determine if the program was replicable,” Russell says.



Gocio Elementary Principal Steve Royce welcomed a pilot program in 2017 to integrate a mental health clinician into the school's operations.

## Thank You Cards & Test Scores

Gocio Elementary, another Title I school, was selected for the expansion program, which launched in the summer of 2017. Throughout the year, every week the clinician, supervised by the Florida Center, saw an average of 18 students, performed an average of 10 short term crisis interventions and an average of 10 therapeutic counseling sessions, according to a report on the first year results.

Teachers praised the program both for addressing the needs of the treated students and also for improving the learning environment for the rest of the class.



Kirsten Russell

Some parents wrote letters of thanks citing an improved quality of life for the child and the family. The report also documented that 86 percent of students served by the program improved their English scores and 79 percent improved their math scores.

## Tragedy Ignites Services

After the Parkland, Florida, school shootings in February 2018, the mental health needs of the young became an urgent priority in Florida and around the country. The state legislature made one-year, non-recurring funding available to local school districts, and Sarasota County Schools decided to use the funds to provide mental health services in other elementary schools based on the Gocio model.

"Sonia Figaredo-Alberts, the school district's Executive Director of Pupil Support Services, was impressed with what she heard about behavioral referrals decreasing and attendance increasing [at Alta Vista and Gocio],



Kathryn Shea

so she asked the Florida Center to hire an additional 10 mental health clinicians within two weeks," says Kathryn Shea, President and Chief Executive Officer of The Florida Center. In an intense hiring blitz, the Center attracted many qualified applicants and met the hiring deadline. The director of the

program matched each therapist to the culture of the schools, which were selected by the school district.

For the 2018-2019 school year, 14 schools are participating in the program, with the Community Foundation and a private donor supporting four — Alta Vista, Gocio, Tuttle and Emma E. Booker elementary schools — with the rest funded by the school district's state funds. The Foundation is also funding an evaluator, assessing program's effectiveness.

Anecdotally, successes continue to be reported. Shea cites how one youngster who was severely depressed and acting out told his mom, "[my therapist] is like a fire hydrant that puts water on my fire."

## Future Needs

About half of the 43,000 students enrolled in Sarasota County schools receive free or reduced fee lunches, the federal measure for determining the poverty level at the school. Such children are more likely to have experienced trauma including homelessness, child abuse and neglect, and food scarcity or to have witnessed homicides and other acts of violence. These experiences, Russell says, actually change the brain, affecting the child's behavior and ability to learn. "We need to start addressing trauma and mental health as early as we can," she says.

Shea hopes in the short term that The Florida Center can add therapists in an additional five to seven elementary schools per year and extend to children in pre-school. She is optimistic that efforts in Tallahassee to continue and expand state funding will be successful, and hopes for more private funding.

"If we can get the word out about the success of this program, I could see a donor committing to indefinitely funding a therapist in a school," she says.

Continued private and public funding both will rely heavily on the documented results of the early pilot programs.

"Philanthropy can play a vital role in helping to raise awareness about a critical need and provide resources to pilot a program," Russell says. "This is a very promising program. I hope the impact we have seen at Gocio is felt at the other schools and that the county and the state will recognize the difference this makes."

# LEADERSHIP

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# Save the Date

## GIVING CHALLENGE

### April 28th and 29th, 2020

Since 2012, donors from throughout our region have shown their love for local nonprofit organizations by providing more than \$40 million in unrestricted funding to support their missions through six Giving Challenges. The 2018 Giving Challenge raised more money than previous challenges in our community, when more than \$11.7 million was raised in just 24 hours to benefit more than 630 nonprofits listed on The Giving Partner.

When first launched seven years ago, the Giving Challenge was envisioned as a three-year commitment by the Foundation. Thanks to our community's generous support and enthusiasm for the Giving Challenge, it was decided to keep a good thing going on a variable timeline. This intermittent schedule allows nonprofit organizations to develop independent fundraising plans that support their important work in a deeper way throughout the year – not just during the challenge. This format also allows time for relationships to develop between organizations and their donors who may have first become connected with their missions through this special event.

If you have questions about the Giving Challenge, or the incredibly important online tool, The Giving Partner, which guides our grantmaking and is a resource for donors, please contact our Manager of Nonprofit Services, **Abigail Oakes**, by email at [aoakes@cfsarasota.org](mailto:aoakes@cfsarasota.org) or call 941-556-7149.

The 2018 Giving Challenge was presented by the Community Foundation of Sarasota County with giving strengthened by The Patterson Foundation, as well as support from Manatee Community Foundation, John S. and James L. Knight Foundation, William G. and Marie Selby Foundation, and the Herald-Tribune Media Group.

**Be The One**

**Be The One**



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