



an unprecedented year

ANNUAL REPORT 2019 - 2020

SARASOTA MEMORIAL
HEALTHCARE
FOUNDATION

Even in the toughest of times, our community steps forward to help one another and our beloved institutions. This year was no different, representing Sarasota Memorial Healthcare Foundation's most successful fundraising year to date.

An Unprecedented Year

Dear Friends and Supporters,

To say that 2020 was an unprecedented year would be an understatement. The pandemic created challenges for all of us, testing our resilience and our health care system. But even in the toughest of times, our community steps forward to help one another and our beloved institutions. This year was no different, representing Sarasota Memorial Healthcare Foundation's most successful fundraising year to date.

We are very grateful to the Brian and Shelia Jellison Family Foundation whose transformational gift will help ensure that SMH's vision to bring comprehensive cancer care to Sarasota will become a reality. Thanks to the Jellison family's generosity, local cancer patients and their families will be able to receive exceptional cancer care without leaving home.

Donor support was also instrumental in helping Sarasota Memorial tackle some of the most pressing COVID-19 needs and ensuring that our hospital had the resources necessary to deliver the highest quality of care to all patients.

We have much to look forward to in the coming year, and we thank you for your continued support and commitment to our mission.



Mason Ayres, CFRE, CFP®
PRESIDENT



William E. Chapman II
2020 BOARD CHAIR



- 04 Highlights
- 10 Grants
- 13 Financials
- 14 Donors
- 29 Board of Trustees



Fundraising Highlights

2019-2020

2020 In Review

The Healthcare Foundation has seen steady growth over the last three years, but 2020 was the most successful year in our over 45-year history. More than \$40 million was donated to Sarasota Memorial Healthcare Foundation. In addition, the Healthcare Foundation awarded more than \$5 million in grants to fund life-saving technology, state-of-the-art facilities, patient care initiatives, clinical research and staff education.

In January, for the third year in a row, our annual Hospital Gala proved to be one of our community's most elegant and successful fundraising events. Over 700 guests attended in a show of support for our community hospital. Each year, proceeds for the Gala help support critical needs at SMH, and this year, the event raised over \$1.2 million in support of Cancer Services at Sarasota Memorial.

In March 2020, the Healthcare Foundation focused much of its fundraising efforts on helping SMH battle the COVID-19 crisis. Over the next weeks and months, the Healthcare Foundation was able to award SMH over \$2 million in grants to address critical needs related to COVID-19 and to help ensure that all patients would continue to receive exceptional care for the duration of the pandemic.

Remarkably, the construction of the new state-of-the-art Cancer Institute continued despite COVID-19. The Healthcare Foundation's *Leading with Care* campaign experienced a significant boost, receiving a \$25 million gift from the Brian and Sheila Jellison Family Foundation. This incredibly generous gift will help transform cancer care in our region.





Brian D. Jellison Cancer Institute

A TRANSFORMATIONAL GIFT

The Healthcare Foundation's *Leading with Care*, a \$75 million fundraising campaign, achieved an important milestone in supporting Sarasota Memorial Health Care System's vision of bringing comprehensive cancer care to our community.

The Brian and Sheila Jellison Family Foundation donated \$25 million to Sarasota Memorial Healthcare Foundation—the largest, single donation in the Healthcare Foundation's history—to advance the mission of Sarasota Memorial's Cancer Institute. The gift was made in honor of Brian D. Jellison, former Roper Technologies President and CEO, who lost his battle with cancer. The Jellisons' generosity was born out of the family's own experience and a belief that no one should have to leave home to receive the best cancer treatment.

In addition to the Jellisons, we also thank the many other donors who have supported the hospital's vision to bring comprehensive cancer care to the region by making significant gifts to our campaign.





Jonathan Mitchell, Philip A. Delaney Jr. and Michelle Mitchell



Mason Ayres with Susan Milman



Gerald A. and Karen A. Kolschowsky

THE CORINTHIAN SOCIETY

DINNER

The Corinthian Dinner

DECEMBER 2019

The Healthcare Foundation honors generous donors at the annual Corinthian Dinner. Honorees are annual donors who have made cumulative gifts totaling \$25,000 or more. Held at the Sarasota Yacht Club, 275 guests attended the dinner, where 82 individual and corporate donors were recognized.



The Hospital Gala

JANUARY 2020

The annual Hospital Gala is one of Sarasota's most highly anticipated events. Over the last three years, The Hospital Gala has raised millions of dollars to support critical services at SMH, and 2020 was no exception. Over 700 guests attended Sarasota's premier black-tie event at the Ritz-Carlton, Sarasota. Proceeds benefitted Cancer Services at SMH, generating just over \$1.2 million in a single evening.



David Verinder, Paul Hudson and Mason Ayres



Ariane M. Dart, Gala Chair



Gala paddle raise



Critical Resources in Real Time

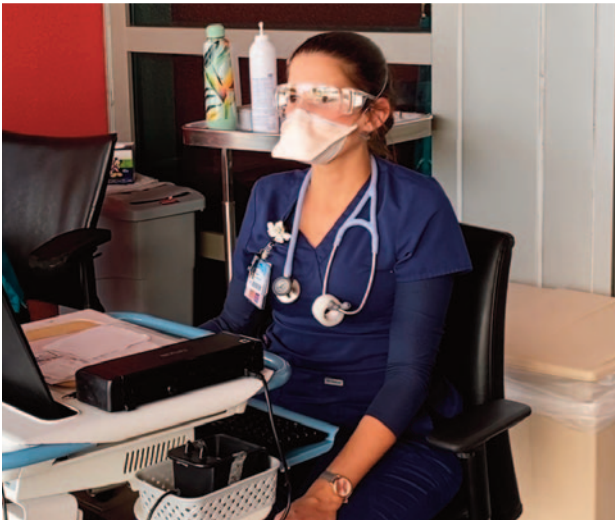
2019-2020

COVID-19 Support

In response to the pandemic, the Healthcare Foundation immediately established a COVID-19 Support Fund. The fund helped SMH with several important initiatives, including COVID-19 patient care, testing and protection for frontline healthcare workers. Without hesitation, our donors stepped forward to help us ensure that our hospital had the critical resources needed in this unprecedented time of need.

The Healthcare Foundation approved over \$2 million in grants to augment equipment in use at the hospital, enhance cleaning and infection control, and assist hospital staff with resources to help manage this pandemic. Grants also supported the purchase of

additional ventilators and high-flow oxygen delivery equipment for critically ill patients, funded additional lab equipment to speed the delivery of COVID-19 test results and expanded the hospital's infectious disease testing capabilities. In the area of research, grants helped support studies testing the effectiveness of the antiviral drug remdesivir and evaluating whether antibodies in plasma from recovered COVID-19 patients could help newly infected patients. Recognizing that no asset is more important during a health emergency than hospital physicians and staff, grants helped purchase additional personal protective equipment (PPE) and provided financial assistance to SMH employees who were economically impacted by the pandemic.



A group of five healthcare workers standing in a hallway. From left to right: a woman in a blue surgical cap, face shield, and white gown; a man in a blue surgical cap and teal mask; a woman in a blue surgical cap and yellow mask; a woman with glasses and a yellow mask; and a woman with blonde hair and a yellow mask wearing a tan cardigan. They are all wearing blue scrubs or shirts and have ID badges. The background shows a hallway with glass doors and a white pillar.

The COVID-19 Support Fund helped SMH with several important initiatives, including COVID-19 patient care, testing and protection for frontline healthcare workers.



Fulfilling Our Mission

2019-2020

Strengthening Healthcare

The Healthcare Foundation supported many critical needs at SMH, awarding more than \$5 million in grants to essential areas such as COVID-19 support, cancer care programs and equipment, behavioral health programs, urology and endoscopy equipment.

With these grants, the Healthcare Foundation also helped support comfort improvements for families in labor and delivery, orthopedic surgery technology, electrophysiology lab upgrades and replacement intravenous pumps for the neonatal intensive care unit (NICU), and more than \$750,000 went to the renovation of SMH's Emergency Care Center. The Healthcare Foundation also designated funds to upgrade the medical library, enhance the music therapy program and support additional patient resources.

We would not have been able to provide these grants without the support of our community.



Grants Awarded

OCTOBER 1, 2019 - SEPTEMBER 30, 2020

Behavioral Health Programs

\$329,492

Blood Drives

\$24,000

Breast Health Diagnostics, Reconstruction, Patient Resources

\$72,283

Cancer Institute Patient Navigation Program

\$113,278

Cancer Care Programs

\$737,371

Cardiac Equipment

\$53,522

Community Specialty Clinic

\$400,000

COVID-19 Support

\$1,829,659

Staff Education

\$241,023

Emergency Care Center Renovation & Equipment

\$759,274

Endoscopy Equipment

\$100,000

Laboratory Equipment

\$3,935

Logistics Center Upgrade

\$101,096

Medical Library Upgrade

\$25,000

Music Therapy Program

\$19,750

Neurological Equipment & Instruments

\$56,003

Patient Care Equipment & Supplies

\$20,000

Patient Resources

\$76,450

Pediatrics Equipment & Supplies

\$65,775

Rehabilitation Program Support

\$30,267

RENEW Employee Wellness Research Program

\$210,500

Scholarships

\$70,000

SMH EXCEL Program

\$3,200

Urology Equipment

\$474,677

Other Healthcare Needs

\$12,928

Total Grants Awarded

\$5,829,483



2020 Financial Position

OCTOBER 1, 2019 - SEPTEMBER 30, 2020

Assets

\$7,420,255	Cash and Cash Equivalents
\$45,200,763	Investments
\$236,659	Prepaid Expenses and Other Current Assets
\$30,840,511	Pledges Receivable, Net
\$6,062,254	Bequests Receivable
\$336,459	Contributions Receivable from Charitable Trusts
\$126,760	Assets Held in Charitable Trusts and Annuities
\$936,729	Beneficial Interest in Perpetual Trusts
\$141,355	Furniture, Fixtures and Equipment, Net
\$91,301,745	Total Assets

Liabilities

\$286,678	Accounts Payable and Accrued Expenses
\$9,422,219	Grants Payable
\$374,544	Deferred Revenue
\$45,727	Annuities Payable
\$79,270	Liability Under Trust Agreements
\$10,208,438	Total Liabilities

Net Assets

\$11,035,960	Without Donor Restrictions
\$61,188,623	WITH DONOR RESTRICTIONS: Purpose and Time Restrictions
\$8,868,724	Held in Perpetuity
\$81,093,307	Total Net Assets



The Corinthian Society is composed of individuals who made or pledged cumulative gifts of \$25,000 or more.

Bonnie and Bill Chapman



Corinthian Society

OCTOBER 1, 2019 – SEPTEMBER 30, 2020

New members are in bold.

CAPITAL \$1,000,000 +

Anonymous
M. Beverly and Robert G. Bartner
The Bolger Foundation
Dart Foundation
Miss Jane C. Ebbs
Louis and Gloria Flanzer
Philanthropic Trust
Keith G. Hirst
Carolyn Thurston Holden
Leona Hughes
**Brian and Sheila Jellison
Family Foundation**
The Janet and Stanley Kane Family
Searcy G. Koen Trust
Gerald A. & Karen A. Kolschowsky
Foundation, Inc.
Mrs. Elizabeth E.G. Mann
Mrs. Philip P. Marvin
Harry O. and Alwena Mayer
Susan F. Milman
Edward D. and Anna Mitchell Family
Foundation
Mr. and Mrs. L. Sanford Reis
Gary and Barbara Rodkin
Samowitz Foundation
Sarasota Memorial Hospital
Auxiliary, Inc.
Helen Schacht
Mrs. Charlotte Siks

The Harry Sudakoff Foundation

Roberta Leventhal
Sudakoff Foundation

KEYSTONE \$500,000 +

Anonymous
Charles & Margery Barancik Foundation
Francine Joyce Blum
Boar's Head Brand
Mr. Henry Cape
Douglas and Sharyn Chapman
Pleasants D. Coggeshall
Anonymous
Dr. and Mrs. Hanns R. Ehrhardt
Mrs. Helen S. Enterline
Jean and Alfred Goldstein
Mary Ernestine Hart
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Ms. Karen S. Matteson
Marianne and William L. McComb
Mrs. Lillian A. Meckler
Rickie and Jana Paley
Gladys Parkin
Winfield & Mildred Ramsdell Trust
Mrs. Ellen M. Sickmeier
Mr. Herbert G. Wile

PILLAR \$250,000 +

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Bini-Scarborough Family Fund
Breast Health Sarasota, Inc.
Emmett J. Brennan
Joan and Dik Browne
Carol and Les Brualdi
The Burruss Foundation Trust
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Margot E. and Warren J. Coville
Linnie E. Dalbeck Memorial Foundation
John H. and Alida J. de Jongh
Mr. and Mrs. Paul Eckel
Lawrence P. and Carol M. English
Mr. John R. Fitzpatrick
Beatrice Friedman
Mrs. Bernadine Haman-Sponzilli
Intertape Polymer Group
Ms. Margaret M. Irwin
Michael V. Janes Non-Grantor
Charitable Lead Annuity Trust
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Jeffrey and Susan Jones
Anonymous
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Flora Major for the
Kutya Major Foundation
Adrienne J. Matcham

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Northern Trust
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Lee and Bob Peterson
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Ms. Helen Scherer
Mark and Paula Schleicher
Mildred and Donald Stein
Frank N. Tedesco, Charitable
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James and Toni Turner Foundation
Michael and Karen Valentino
Jean Weiller
Mr. and Mrs. William L. Weiss
Williams Parker-Attorneys at Law

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Amicus Foundation, Inc.
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Anonymous #14
David S. and Myrna L. Band
Harry and Harriet Bernbaum
Robert and Willa Bernhard
Estate of Marjorie Brett Boulware

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 Audrey Rau Dempsey Endowment
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 Michael Saunders & Company
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 Chuck and Chris Shivery
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 Harry O. Specht, M.D.
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 Donna Wolf Steigerwaldt Foundation
 Norma and Hugo Stein
 Dee and Charles Stottlemeyer
 Michael and Robin Strauss
 Robert L. Stuffings
 Dr. and Mrs. Christopher C. Swain
 Jim and Charlie Ann Syrett
 Tarr Charitable Family Foundation, Inc.
 Joyce Tate

Marcia Jean Taub in loving memory
 of Ethel and Ron Taub

Mrs. Beatrice R. Thompson
 Tom Towler and Nancy Lyon
 Mrs. Howard W. Trevey

Anonymous

Frances G. Van Gorder Estate
 Bernard W. and Maureen Walsh
 Elisabeth Waters
 Ms. Barbara Whitcraft and
 Mr. David Heinsler
 Steven White
 The Edward and
 Ruth Wilkof Foundation

Mr. and Mrs. Jason D. Wilson

Edie Winston
 Margaret Wise
 Marilyn Wolff, Charitable
 Remainder Unitrust
 Peggy and Art Wood
 Angelia and Robert Wood
 Mrs. Frances Wormser
 Judy Zuckerberg and George Kole

DOCTOR OF PHILANTHROPY \$50,000 +

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 Bank of America
 Bank of America Client Foundation
 Anonymous
Bernbaum Family Charitable Fund

CORINTHIAN SOCIETY | 2020

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 Foundation
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 Charitable Trust
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 Bibb and Pamela Swain
 Sylvia and James Taylor
 Team Tony Cancer Foundation, Inc.
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Virginia B. Toulmin Foundation
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 Mrs. Teresa J. Weill
 Mrs. Judy White
 Elton and Gordie White

CORINTHIAN SOCIETY | 2020

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Allegiance Fundraising Group
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Carol and Morton Allen
Drs. George and Janet Allgair
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APG
Mason and Anne Ayres
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Bank of America Client Foundation-
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Jan and Bill Mauck
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The Mennen Company
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Lois Rose Miles

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Mrs. Adelaide Moise
Ms. Elizabeth Moore
Mr. Gordon C. Morse

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Margaret Nadler
Richard and Betty Nimitz
Anonymous

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Flori Roberts
Ms. Amy F. Rode
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Sarasota Anesthesiologists, P.A.

Sarasota Ford
Sarasota Plastic Surgery Center
Sarasota Vascular Specialists
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Lorraine and Richard Schwarz Family Foundation

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Starlight Children's Foundation
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SunTrust Bank, Gulf Coast
Synovus Bank
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David and Monica Verinder
Dr. Kirk and Chris Voelker
Wachovia Foundation
Pauline Wamsler

Mr. and Mrs. Peter Wasserman

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Jacob A. Weiser Memorial Fund
Mrs. Beth R. Welsh
Mrs. Virginia West
Mrs. Bessie S. Whitcraft

Thomas and Ann Wierdsma

T. Wilson Williamson
Bill and Cheryl Woeltjen
Mr. and Mrs. Rudolph F. Zupancic



New members are in bold.



The Legacy Society recognizes individuals who have made a commitment through a will, trust agreement, prepaid life insurance policy or other estate plan vehicle.

Adrienne Matcham



Legacy Society

OCTOBER 1, 2019 – SEPTEMBER 30, 2020

Mrs. Beverly Arries
Patricia and Graham Barkhuff
M. Beverly and Robert G. Bartner
Elaine Baverman
Mr. and Mrs. Arne K. Berg
Harry and Harriet Bernbaum
Donald H. and Barbara K. Bernstein
Mr. Sidney Bernstein
Mrs. Robert W. Bingham
Francine Joyce Blum
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Mrs. Nina Bossert
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Carolyn Cooper
Thomas Coundit
Mrs. William O. Crittenden
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Mr. and Mrs. Richard O. Donegan

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G. Duncan Finlay, M.D., and
Michele Wolk, MSN
Beatrice Friedman
Anne and Cope Garrett
Dr. Arthur and Toby Geller
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Leila Gompertz
George and Ruth Haines
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Mr. and Mrs. Robert Hammer
Werner and Karen Hartenberger
Casiana and Barry Hilton
Allen and Stephanie Hochfelder
Verna M. Hoffman, Charitable
Remainder Unitrust
Doug and Carolyn Ann Holder
Betty S. Holmes
Patricia N. Holmes
Anonymous
Mr. Richard S. Johnson
Harriet V. Josenhans
Mr. and Mrs. Steven H. Judd
Dr. Sidney Katz
John J. Kestly
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Mrs. Carol Krug
Moses and Pat Lane

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Kathryn and James Liddell
Dr. Charles and Mrs. Lisa Loewe
Carol K. Longley
Madge Lumb
Flora Major
Walt Mannini
Adrienne J. Matcham
Allen D. McGee and Paula Norwood
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Joan Armour Mendell
Eileen Skehen Michala
Heather G. Miller, Ph.D.
Lois Rose Miles, Gift Annuity Fund
Shirley Rae Miller, Pooled Income Fund
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Joel and Gail Morganroth
Loretta Naylor
Mr. and Mrs. William O. Nicoll
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Deborah Poff and Valarie Clark
Rose Marie Proietti
Florence and Saul Putterman
Beverly R. Ricciardi
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Mr. Brent Rugh
Mary and Buddy Savary
Mary Seymour
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Mr. S. Richard Silbert
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Marcia Jean Taub
Elizabeth T. Templeton
James and Susan Tollerton
Mr. Thomas H. Towler, Gift
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New members are in bold.

A photograph of three people standing in front of a large, decorated Christmas tree. On the left is a man in a light blue suit and dark tie. In the center is a woman in a colorful, patterned dress holding a glass of red wine. On the right is a man in a dark blue suit and striped tie, wearing a name tag that reads "Jack Rodman, M.D." and the number "18". The Christmas tree is decorated with lights and ornaments.

The Annual Gifts list is composed of individuals who made or pledged cumulative gifts of \$500 or more in fiscal year 2020.

David Verinder, Carla and Dr. Jack Rodman



Annual Gifts

OCTOBER 1, 2019 – SEPTEMBER 30, 2020

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Family Foundation
Anonymous
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