THE PATTERSON FOUNDATION

Exploring a Decade of Impact 2010-2020
From its inception in 2010 through the end of 2020, The Patterson Foundation (TPF) has invested more than $100 million, mostly in the Suncoast region in Charlotte, DeSoto, Manatee, and Sarasota counties, but also in several vital national initiatives.

What “impact” has that money made? How has it promoted lasting or evolving change? What difference has it made to and in the community?

With these questions as guides, TPF Fellow Abby Rolland analyzed and crafted this report, "Exploring a Decade of Impact" to gain a broad understanding of the change that TPF has inspired. Through quantitative data and qualitative responses she took a deep dive into TPF’s impact and how it has reverberated in the Suncoast region, and across the country and world.

As TPF seeks to strengthen people, organizations, and communities by focusing on issues that address mutual aspirations, foster wide participation, and encourage learning and sharing, it’s important to understand the change being sparked and catalyzed.
Values & Approaches

To understand The Patterson Foundation’s efforts and its impact, one must also look at its values and approach to philanthropy, and how it strengthens people, organizations, and communities.

Our Values

The values guide TPF’s approach to philanthropy, which then guides a greater understanding of its impact. These values aren’t just listed on a wall and then ignored – they are deeply embedded and woven into how TPF conducts its work. Understanding them leads to a greater understanding of the “how” and “why” behind TPF’s work and the change it seeks to catalyze.

We work with others to strengthen their impact by:
• Understanding that resources and expertise beyond the gift provide value
• Being accessible and engaged with others
• Striving to learn as we collaborate and share successes and challenges

We believe meaningful change requires commitment and persistence, and we encourage this by:
• Embracing new ideas that address a constantly changing world
• Undertaking philanthropic work in ways others are not doing, cannot do, or will not do
• Demonstrating integrity blended with joyful stewardship

We invest for lasting impact by:
• Managing assets responsibly
• Realizing real change requires depth of resources
• Focusing on shared aspirations while leveraging resources
Approach

TPF uses many lenses to illustrate how it works with individuals, businesses, nonprofits, government, and the media. Learning about its approaches also creates an understanding of why the Foundation structures its work in the way that it does.

Catalyzing Efforts

The Patterson Foundation connects, learns, shares, evolves, and strengthens people, organizations, and communities. It fosters wide participation in its initiatives, and invites all who want to participate to do so. In all of its efforts, TPF invests time, treasure, talent, and testimony into these five efforts.

Connecting

TPF’s approach is organized around the principle that, to learn, share, evolve, and strengthen, we must first be connected. TPF provides opportunities to bring people, organizations, and communities together, strategically linking Internal Stakeholders (CEO/executives director, board, staff, donors, volunteers and beneficiaries); External Stakeholders (people, businesses, nonprofits, government and the media); and Areas (local, regional, national, and global communities).

Learning

TPF recognizes the importance of investing in learning—because the time spent listening, asking, and exploring builds mutual understanding, and mutual understanding fosters the development of trust.

Sharing

TPF believes that important assets—including information, knowledge, skills, and expertise—are interwoven through collaboration to bolster the impact of initiatives. Sharing is the pivotal point linking the benefits of connecting and learning to the opportunities for evolving and strengthening.

Evolving

A core of philosophy of TPF is that “change happens at the speed of trust.” As confidence grows, the belief in new possibilities begins to emerge, and meaningful incremental changes are made toward positive transformations.

Strengthening

TPF supports the effort of people, organizations, and communities by focusing on issues that address mutual aspirations, foster wide participation, and encourage learning and sharing.
Aligning with Partners

Partnership and collaboration are never easy. To maximize impact and change, TPF aligns with partners who demonstrate alignment in leadership, willingness, readiness, capacity, and culture.

Importance of Alignment

Aligning five characteristics — leadership, willingness, readiness, capacity and culture — to be prepared and, ultimately, successful.”
Opportunities for Impact

The Patterson Foundation capitalizes on methods to refocus efforts toward lasting impact.

Internal Stakeholders Engagement

To foster change, organizations must ensure that they have their internal stakeholders on board and ready to work with others.

External Stakeholders Engagement

Many actors play a role in our lives. By collaborating with cross-sector partners who have diverse ideas, vital strengths, and serve different populations, TPF is better able to work toward collective, shared results.

When we understand the “Why,” we embrace the “How” and the What.”

Working together... to rethink obstacles and explore solutions.
Opportunities for Impact

Moving the Needle

TPF fosters change through concentrated efforts in moving the needle, instead of through short-term outputs and actions. By moving to a mindset of abundance, aspirations, engagement, systems, and outcomes, TPF is better able to work with others to catalyze impact.

Finding ways for people to engage and create their desired future.
Five Constants in the Face of Change

No matter the circumstances, The Patterson Foundation (TPF) enters each day focused on five constants that power its ability to thrive in the face of change while harnessing that change to work in new, impactful ways.

Caring
With its many initiatives — regardless of the aspiration or geography involved — TPF channels empathy and compassion for our world. The unfettered charter undergirding its efforts allows TPF to undertake work in ways others are not doing, cannot do, or will not do. This affords TPF unique opportunities to create meaningful change through its philanthropy, and it’s one for which we are ever grateful. Knowing and embracing what’s possible through our work allows each of us to live and work in the spirit of joyful stewardship.

Connecting
TPF’s approach is organized around the principle that, to learn, share, evolve, and strengthen, we must first be connected. TPF provides opportunities to bring people, organizations, and communities together, strategically linking Internal Stakeholders (CEO/executive director, board, staff, donors, volunteers, and beneficiaries); External Stakeholders (people, businesses, nonprofits, government, and the media); and Areas (local, regional, statewide, national, and global communities).

Collaborating
When TPF seeks to strengthen outcomes within shared aspirations, it looks to the organizations and entities at the forefront of the ongoing work in that space. Rather than arrive at its work with the answer, TPF strives to learn from those actively creating the kind of future people aspire to live in, finding opportunities to strengthen their efforts while continuing to introduce them to other mission-aligned causes and organizations.

Contributing
As a fully endowed charitable entity, TPF has substantial resources to help strengthen those with which it collaborates. However, the true value of TPF’s support goes far beyond any one-time check. With an eye toward long-term thrivability and mission impact, TPF exercises agility in its response to emerging funding opportunities while creating opportunities to catalyze additional support from donors big and small to these organizations and networks.

Creating
Beyond sharing promising innovations within these networks, TPF actively works with them to identify opportunities to innovate organically — from idea to implementation. Developing high-tech platforms and virtual experiences can connect more people, organizations, and communities to proven solutions and approaches that advance shared aspirations in new, exciting ways.

Change is inevitable. Through caring, connecting, collaborating, contributing, and creating, TPF is better able to manage and catalyze positive change.
Phases of Disaster Recovery

Disasters and challenges come in many shapes and sizes. When organizations are able to identify whether they are coping with the challenge, adapting to new realities, or innovating to spark solutions, they are better able to function and take available opportunities.

Diving into detail on each of these approaches could be a small book. What’s most important to realize is that each contributes to TPF’s impact in that they model and guide TPF in its efforts. TPF approaches issues from a holistic, thoughtful, community-based, and cross-sector perspective. There is never a simple answer to the thorny issues it seeks to tackle, which makes quantitatively measuring impact difficult. However, knowing about these principles and understanding how they influence and guide TPF’s efforts illustrates that defining impact is not straightforward, but instead is evolving and requires analyzing a wide variety of contributing factors and players.

The Patterson Foundation understands that the recovery process following a disaster or unexpected challenge includes three distinct phases:

Cope → Adapt → Innovate
TPF has invested more than $105.7 million into the community through the end of 2020. While the numbers don't paint the entire picture of TPF's impact, they show the quantitative investment made into people, organizations, community, disaster relief, and more.

Of note – During the momentous year of 2020, TPF gave far more than its required 5% distribution from its endowment. When the COVID-19 pandemic struck, thus terrifying populations, leading to the deaths of millions of individuals worldwide, and changing the fabric of how we conduct life, TPF invested not only into direct COVID-19 response, but also into a new initiative focused on digital access after recognizing that in a world focused on doing all activities from home, digital access is a necessity.

In addition, understanding the importance of the decennial U.S. Census and why it matters for every person to be counted, TPF invested toward support for Census education.

These additional efforts illustrate TPF’s mindset and how it invests resources at times most needed, and not when it only satisfies the ledger.

Supporting organizations (38% of all given funds) and community (33%) are at the heart of what TPF does. While people (9%), disaster relief (8%), and other related initiatives and projects (12%) are vital contributing factors for change, part of TPF’s impact can be recognized through its deep, abiding investments into the organizations and communities that strengthen people and the entire region.

The giving has been distributed over 52 initiatives, of which 24 are closed and 28 are current initiatives.
Endowment Funds

Not only does TPF invest into current initiatives, but it also supports efforts through its 20 endowment funds. TPF has invested $11.7 million into these funds that have grown to over $18.7 million to date. The Endowment Funds are designed to support projects and efforts for the long term. While not illustrating the totality of TPF’s impact, these funds help paint a picture of an organization’s commitment to its community in perpetuity.

Initiatives – People, Organizations, and Communities

When Dorothy Patterson passed away and left her estate to The Patterson Foundation, she also left an unfettered charter. In other words, she gave the stewards of the Foundation the ability to be creative and try new and innovative ways to give back.

Initially, TPF created nine legacy initiatives to honor Dorothy and Jim Patterson. Over time, as various community needs shifted, altered, or began, initiatives were adapted, morphed into new initiatives, or concluded.

Many TPF initiatives are not short-term projects that will produce a desired product in a small amount of time. Rather, they are thoroughly planned, deep investments into the community. Shorter-term initiatives have specific reasons behind the length of the project — for example, Legacy of Valor led up to the dedication of Patriot Plaza.

When The Patterson Foundation invests resources into its work, it invests for the long-term.
Notes on Current Initiatives

TPF's longest, lasting initiative, Season of Sharing, supports a program created with the Community Foundation of Sarasota County and Herald-Tribune Media Group. Patriot Plaza, its second longest-lasting initiative, is in collaboration with a federal agency. This is the first-ever partnership between the U.S. Department of Veterans Affairs' National Cemetery Administration and a private foundation.

TPF's current initiatives have a wide variety of different focus areas that benefit people, organizations, the community, and disaster relief.

Many of the longest-lasting initiatives, such as Aspirations to Actions and Nonprofit Thrivability, have evolved. For example, Aspirations to Actions evolved from focusing solely on incorporating the Harwood Institute for Public Innovation's labs to including the one-act play A Walk to Respect, the Stepping Forward book circles, and various community conversations. Initially, TPF's work in supporting thrivable nonprofit organizations was limited to its work in Margin & Mission Ignition. When this work expanded to include Advancing Mission Thrivability in 2020 and the HundredX pilot project in 2021 as a reaction to the COVID-19 pandemic, the Nonprofit Thrivability initiative was created to encompass all of TPF's work strengthening nonprofits and helping them become more thrivable.

TPF's current initiatives also include long-term community investments and public-private partnerships. The Bay will transform 53 acres of the city's most precious land on Sarasota's bayfront into a public park. TPF provides support to The Bay project when certain levels of community fundraising are realized.

The Suncoast Campaign for Grade-Level Reading (SCGLR) partners with parents, schools, nonprofits, businesses, and community members to help boost third-grade reading level scores in the four counties. With numerous partners and multiple projects, SCGLR collaborates with many to ensure children have access to books, love reading and school, and have families who understand the importance of learning, especially at an early age.

Aspirations Journalism partners with various media outlets to share important, unbiased information about pressing issues. Philanthropy can amplify communications work, and this initiative seeks to share knowledge about issues that the community cares about.

Other initiatives focus not on specific projects or ideas, but on people. Advancing Philanthropic Leadership invests in philanthropic leaders to strengthen the sector and embed TPF values in future leaders in the field. This initiative is dedicated to growing the capacity of young people dedicated to working in philanthropy.

Initiatives also respond to current challenges that have no direct answer. SCGLR is one of those initiatives. So are Digital Access for All and COVID-19 Response. Each of these initiatives requires deep commitment to partnerships and learning, an understanding that the needle for change moves slowly and cannot always be measured, and the difficult but essential nature of aligning goals and aspirations to reach community objectives.

EdExploreSRQ and Suncoast Nursing Action Coalition (SNAC) focus on learning and development, while the Giving Challenge also seeks to strengthen nonprofits in the work that they do. Support for NetHope and the Center for Disaster Philanthropy represents support following local, national, and international disasters throughout their complete lifecycle, along with capacity-building investments. Age-Friendly Sarasota and Suncoast Villages seek to spark connections with older adults and help them connect with communities and neighbors in various ways.

The Patterson Foundation's past and current initiatives are a broad range of community-based efforts focused on community needs and aspirations. Each initiative is carefully researched and planned before implementation, and each one considers relevant community and expert voices to be the driver behind its actions and efforts. While it is challenging to understand their impact, and even more difficult to quantify it, they provide a glimpse into the wide-ranging foci of TPF.

To learn more about them and see how each one is making a difference, visit ThePattersonfoundation.org.

However, it's also important to note that no single TPF initiative or endeavor is solely responsible for creating lasting change. Rather, TPF works in a philanthropic and community ecosystem with many investments that complement each other, alongside many partners who collaborate with TPF and contribute to sparking the change that the community seeks.
While it is difficult to quantify TPF’s impact and hard to explain the impact of each initiative, TPF Fellow Abby Rolland asked individuals involved directly and indirectly in TPF’s efforts to share their thoughts.

Individuals and organizations surveyed include consultants who work directly with TPF, as well as partners from the following organizations and communities: Center for Disaster Philanthropy, Community Foundation of Sarasota County, DeSoto County, United Way of Charlotte County, the Herald-Tribune Media Group, Sarasota County Schools, Anna Maria Oyster Bar, Florida Cultural Group, Visual Arts Center, and the Harwood Institute for Public Innovation.

They have been involved in the following current initiatives: Center for Disaster Philanthropy, Season of Sharing, The Giving Partner, the Giving Challenge, Aspirations to Actions, Suncoast Campaign for Grade-Level Reading, COVID-19 Response, Aspirations Journalism, EdExploreSRQ, Patriot Plaza, Nonprofit Thrivability, NetHope, Honoring & Onward, Suncoast Villages, Digital Access for All, Advancing Philanthropic Leadership, and Age-Friendly Sarasota.

**People**

Guided by individual values, experiences, and expertise, people engage in the world beyond themselves to create positives.

**Organizations**

Organizations are collectives — each with a mission focus to build a vibrant society.

**Communities**

Through the collaborative efforts of people, businesses, nonprofits, government, and the media, we can achieve greater impact toward community thrivability.
External Partner Comments

“TPF has sought to operate in a fundamentally different way than more traditional funders. It seeks to be catalytic; to leverage other funders and partners; to ensure alignment with its partners in real and genuine ways; to create connective tissue. I think of TPF as a kind of applied lab; the individual initiatives, while all important in their own right, collectively create insights and lessons that transcend any of those individual efforts.”

“The Patterson Foundation’s work has been critical and inspiring. Beyond the financial support provided to our organization, the team at TPF has been a consistent partner for high-quality feedback and strategy discussions.”

“TPF’s team from the top to the bottom are risk starters, cultural changers and willing to have open, uncomfortable conversations. TPF is about uncovering the strengths within our community for the benefit of all.”

“TPF’s disaster-related investments are thoughtful, compassionate while also quick and decisive. Knowing that medium- and long-term recovery requires significant, sustainable and unrestricted funding allows TPF’s impact to have a ripple effect around the globe. Such impact associated with long-term recovery includes early childhood education, health, household stability (food security and workforce development), and affordable housing.”

“Connective tissue has been built so we are strengthened rather than being so siloed. All sectors of our community are improved – more qualified nurses, kids can read, non-profits have more skills, etc. People have hope. “New” and “possibility” thinking is afoot and deepened.

“Through leveled and intentional investments, TPF has reached exponentially more than can be quantified by a dollar amount. Complementing our mission of mobilizing the power of the community to break the cycle of poverty, TPF dollars have allowed us to grow our capacity to serve, reach more people than otherwise would have been possible, and all the while inspire partners to look outside of ourselves.”

“Our communities are so blessed to have the vision and leadership of TPF. The huge investment made in key initiatives that affect the wellbeing and future of our community will be felt for generations to come - the $100 million investment in these initiatives is saving our communities hundreds of millions of dollars in future investments to ensure the equitable quality of life for all.”
As a result of its on-the-ground work, TPF demonstrates the power of ‘more than money philanthropy.’ It brings perspective, influence, networks, skills, credibility, local knowledge, and assorted trusting relationships to the table. It’s the combination of all of those offerings that advances the work, in addition to TPF serving as a partner and critical friend in this catalytic role.”

The personal touch that’s displayed in every detail captures the level of honesty, empathy, and excellence that is like no other. TPF propels possibility on a daily basis, whether through allowing for open dialogue and discussion in a personal, one-on-one setting or hosting a large number of individuals working together for the good of all humans.”

TPF is building an infrastructure of positive change. It does this through initiatives like Aspirations to Actions, through its efforts to strengthen nonprofits, through its Giving Challenge matching funding. It also does this through Aspirations Journalism, bringing the public into the effort by informing and educating them about a specific topic that encourages the community to participate in positive change.”

TPF has made our communities think bigger, look to long-lasting solutions, expand the horizons of the entire community, and provide pathways out of poverty that can be used for generations. They are thoughtful, long-term initiatives that the community can continue to learn from and implement.

Through its initiatives, TPF touches every person in our community multiple times in seen and unseen ways. TPF teaches a person (organization or community) to fish instead of giving a fish. It facilitates others to help themselves and achieve their aspirations. The work focuses upon engagement – uniquely focusing on mutual aspirations and fostering wide participation. TPF is about engagement of people, organizations, and communities in issues they care about. TPF supports and builds from a collaborative “we” platform, breaking down a we/they mentality to create lasting systemwide change and results. TPF has and is changing attitudes, beliefs, and outcomes about what is possible and how we can address challenges (together) because it is deeply committed to why and how as well as who and what.”
Analysis

Quantitative

By analyzing the numbers of TPF’s current and past initiatives, as well as its endowment funds, one can see how much of an investment TPF has made into a variety of community-based initiatives. Numbers don’t tell the whole story, but they do illustrate on a pure dollar basis how much TPF has invested monetarily into the Suncoast and several broader efforts.

The numbers, as well as the initiatives, illustrate how carefully TPF considers what it invests in. It does not sit with initiatives longer than is necessary but decides to move on when the initiative is carried forward by others or is not relevant any longer. In addition, creating new initiatives based on external events and shared aspirations illustrates a clear effort to address relevant community issues.

Looking at the sheer number of past and current initiatives, as well as endowment funds, shows TPF’s creative and various approaches to catalyzing community impact.

Qualitative

Not only has TPF invested monetary resources, but the number of positive and thoughtful messages from many different individuals and organizations demonstrates the impact that TPF has had on others and in its community.

Part of describing impact is not only revealing how your organization catalyzes change, but sharing how others describe it as well. TPF’s impact would be nothing without having partners or community organizations to engage with. TPF has been able to help stimulate change, at times through painstaking, groundbreaking work, with partners who are on the ground doing work. From a qualitative perspective based on stories from collaborators, TPF’s investment into people, organizations, and communities has made a measurable impact.

What’s Evolving?

Part of describing impact is describing evolution. Impactful organizations don’t sit still after they’ve inspired or catalyzed change. They find new ways to build on success, create new opportunities to think outside of the box, and find and pursue new possibilities to engage with others.

In that sense of impact, TPF also continually asks, “What more? What could be better?” As evidenced in the Nonprofit Thrivability initiative that evolved from Margin & Mission Ignition, in the ways that the singular Patriot Plaza initiative has developed over the years, in the creation of new initiatives, and the numerous conversations, events, and initiatives that TPF supports and leads, evolution is built into TPF’s DNA.

Rather than asking, “Are you evolving?” perhaps it’s better to ask TPF, “What’s evolving, why is it evolving, and why does that matter?”

The answers will be plentiful and demonstrative of TPF’s willingness and eagerness to evolve. Thus, the $100 million invested so far is continually evolving, as will the next $100 million.
What’s Lasting?

To describe impact, it’s also vital to understand what has lasted. These efforts may have evolved over the years, but what is lasting about the work TPF has stimulated?

Take a look at Season of Sharing. Created in 2000 as a partnership between the Herald-Tribune Media Group and the Community Foundation of Sarasota County, TPF became involved at its inception. Its involvement continues to this day, as it contributes a unique match to help people in crisis regain their stability. Even in a generally wealthy area like Southwest Florida, many individuals and families are one missed paycheck or one extra bill away from being forced to leave their homes. TPF’s support for this program is evidence of its longstanding belief in the inherent dignity of people and the utter importance of a home in maintaining that dignity.

Then, there are the initiatives such as the Aging Mastery Program, the Health Safety Net System of Care Collaboration, and New Media Journalism that evolved and/or moved beyond the realm of TPF and/or helped incubate other new organizations. They now are either organized and/or led by others who carry the work forward.

What’s continued at TPF throughout its 10+ year history is its commitment to its values and approaches. While some of the approaches were clearly defined and illustrated as a result of the COVID-19 pandemic, the other approaches and the values of TPF have been embedded into the organization since its creation, and they continue to inform and guide the Foundation’s work.

So, the $100 million that has been invested into the community, region, nation, and world is $100 million that has lasted and continues to influence and inspire in its efforts.
Conclusion

The generosity of Dorothy Patterson has sparked long-lasting and far-reaching change in the Suncoast region. While the word “impact” is difficult to understand, the best way to frame it is through TPF’s Moving the Needle Framework.

**Scarcity to Abundance**
Expanding a narrow scope of thinking to a broad view of the collective resources from multiple sectors.

**Issues to Aspirations**
Shifting the focus from problems, challenges, and barriers to a shared vision and new possibilities.

**Enabling to Engaging**
Rather than taking actions that perpetuate problems, creating opportunities that change realities.

**Silos to Systems**
Rather than acting in isolation, exploring, discovering, and working together in a shared ecosystem.

**Outputs and Outcomes**
Rather than focusing on short-term actions, optimizing efforts toward long-term impact.

This framework provides a lens for understanding TPF’s $100 million of giving thus far. That $100 million has brought together individuals, organizations, and communities to share collective resources with a wide variety of groups. It has established shared aspirations, goals, and visions through the mindset of asking, “What’s possible?” rather than focusing on the problem. It has created spaces and opportunities to change realities instead of taking actions that perpetuate problems and failed attempts at solutions. It works in a shared ecosystem, realizing that working in isolation does not benefit anyone or move projects, plans, or solutions forward. Finally, TPF doesn’t focus on short-term actions, but rather optimizes efforts and collaborates with many partners toward long-term change.

Trust helps shape communities, and change happens at the speed of trust. Change and building trust are integral to what TPF does. Using that $100 million to build trust and move the needle through its initiatives, endowment funds, and its many, many partners, The Patterson Foundation catalyzes and inspires change and impact in our world.