



THE DONNA FOUNDATION, INC.

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EIN: 26-2736601
Report Generated on: 03/28/2024

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THE DONNA FOUNDATION, INC.

fka 26.2 WITH DONNA THE NATIONAL MARATHON TO FINISH BREAST CANCER

Jacksonville, FL

thedonnafoundation.org

(904)551-0732



View GuideStar Profile



MISSION

The DONNA Foundation is a 501(c)3 nonprofit organization established in June 2003 by three-time breast cancer survivor and visionary Donna Deegan. Through her own experience breast cancer surviving breast cancer three times, Donna has cast a vision to transform the experience for those living with breast cancer to one of love and support over fear and confusion. The mission of The DONNA Foundation is to provide financial assistance and support for individuals living with breast cancer and fund ground breaking breast cancer research.

EIN

26-2736601

RULING YEAR

2008

IRS SUBSECTION

501(c)(3) Public Charity

FOUNDING YEAR

2003

MAIN ADDRESS

1015 Atlantic Blvd #58
Atlantic Beach, FL
32233

AFFILIATION TYPE

Independent Organization

CONTACT

Amanda Napolitano, Executive
Director
(904) 608-3481
amanda@thedonnafoundation.
org

EXECUTIVE DIRECTOR

Amanda Napolitano

BOARD CHAIR

Amy Mergen

SUBJECT AREA

Breast cancer

Human services

NTEE Code

Human Service Organizations
(P20)

Breast Cancer Research (H32)

PROGRAMS

1. DONNA CareLine

Population(s) served:People with diseases and illnesses, Families
2. Research Disbursement

Population(s) served:People with diseases and illnesses, Families
3. Survivorship, Education and Awareness

Population(s) served:People with diseases and illnesses, Families

POPULATIONS SERVED

1. Women and girls
2. Families
3. People with diseases and illnesses

COMPLIANCE

- ✓

IRS Pub 78 Verified as of March 2024
- ✓

IRS BMF 509(a) (1) as of March 12, 2024
- ✓

A-133 Audit Required/Performed?
- ✓

Conflict of Interest Policy
- ✓

Written whistleblower policy

Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- ✓

Board Practices Reported?
- ✓

Diversity Data Reported?
- 12

Number of Independent Board Members

Programs & Results

PROGRAMS

Source: Self-Reported by Organization,
September 2023

DONNA CareLine

Population(s) Served:

People with cancer
Families

The DONNA CareLine is the front door for families in need with breast cancer to The DONNA Foundation. The DONNA CareLine provides specific case management services to patients, caregivers and/or their providers. The CareLine is staffed by a team of professional case managers with both nursing and social work backgrounds, and non-clinical case managers who have an insurance industry background with coding and billing expertise. Using their knowledge of reimbursement issues, this dedicated team will be able to help patients diagnosed with breast cancer with the following:

- Access to care issues
- Assist patients with insurance denials
- Assist with workplace and employment protections
- Review and educate on insurance plan language
- Employment challenges including loss of income and compromised benefits that impact access
- Medical debt crisis that has impacted or stopped required care
- Cost of living debt crisis that forces many to choose between paying for treatment or paying for their essential costs of living, often resulting in a decision to go off therapy
- Screening for the DONNA Financial Aid Fund providing small grants to help offset expenses related to care.

The DONNA Foundation funds novel research initiatives with the goal to more effectively diagnose, treat and ultimately finish breast cancer for all patients. More than \$3M has been granted in support of translational genomics and immune studies. From an initial contribution from The DONNA Foundation to Mayo Clinic of more than \$500,000 in 2008, Mayo Clinic established its Breast Cancer Translational Genomics Research Program. Ongoing contributions from The DONNA Foundation, as of February 2020 totaling more than \$3 million, allow Mayo Clinic to build and maintain genomics infrastructure in Jacksonville, making it possible for laboratory teams not only to carry out state of the art breast cancer research, but also to function as a resource for individuals who need genomics support for clinical/translational or basic studies in cancer.

Survivorship, Education and Awareness

Population(s) Served:

People with cancer
Families

Although the word survivorship can mean different things to different people, survivorship for most begins at diagnosis and continues for a lifetime as a family learns to live with and beyond breast cancer. The DONNA Foundation empowers survivors and their families with specifically designed programming, events and information.

Research Disbursement

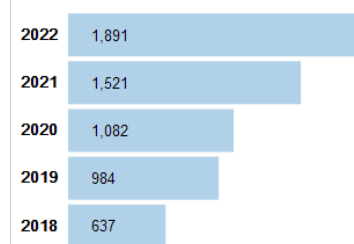
Population(s) Served:

People with cancer
Families

RESULTS

Number of chronically ill patients served

TOTALS BY YEAR

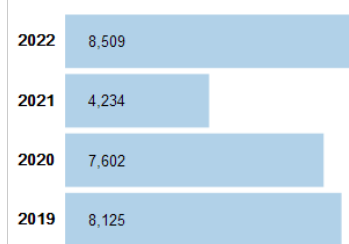


Population(s) Served: People with diseases and illnesses

Related program: DONNA CareLine

Participation in annual Survivorship Programming.

TOTALS BY YEAR

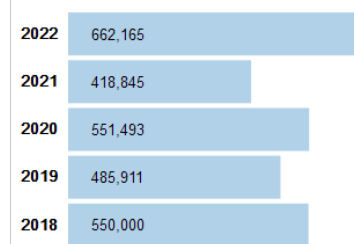


Population(s) Served: No target populations selected

Related program: Survivorship, Education and Awareness

Amount of financial services and debt relief secured for families living with breast cancer.

TOTALS BY YEAR

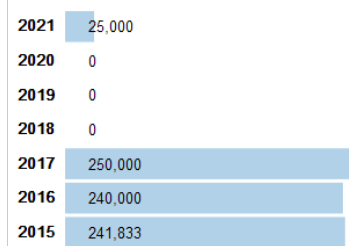


Population(s) Served: No target populations selected

Related program: DONNA CareLine

Total funds disbursed to Research Programs.

TOTALS BY YEAR



Population(s) Served: No target populations selected

Related program: Research Disbursement

CHARTING IMPACT

What is the organization aiming to accomplish?

The DONNA Foundation is delivering on a three-year strategic plan aimed to achieve the following objectives:

1. Our organization and resources are well aligned to support strategic priorities and driving sustained performance.
 2. The performance of the organization aligns to brand perception, and the community understands and supports the programmatic needs of the organization.
 3. The organization has no deficit and three months of operational reserve.
 4. All programs are fully funded, with funding channels aligned to growth of demand.
 5. DONNA Marathon Weekend recognized as an industry leader both locally and nationally.
 6. Organization is recognized nationally with funding support in/from strategic markets.
 7. The DONNA Foundation is viewed as a source of love and empowerment with all who join our tribe living life fearless.
-

What are the organization's key strategies for making this happen?

1. Build our human and organizational capacity.
 - a. Continue to follow an actionable, strategic plan.
 - b. Reimagine the organization both structurally and culturally.
 - c. Develop and deliver on a CRM RoadMap.
 2. Ensure the sustainability of our organization, increasing revenues to sustain impact.
 - a. Hire/engage Chief Financial Officer.
 - b. Standardize development opportunities including sponsorship packages.
 - c. Establish Board Development Committee with strong leadership.
 3. Advance the organization's brand.
 - a. Develop comprehensive/integrated marketing and communication plan.
-

What are the organization's capabilities for doing this?

We are in year 3 of a 5 year strategic plan to increase visibility, grow our team, and secure needed resources.

What have and haven't they accomplished so far?

Our organization has:

1. Continued to develop and maintain strategic partnerships – both new and renewed initiatives.
2. Continued to monitor success and evaluate programs
3. Redefined the development team to align with the strategic planning process
4. Grown the size of the board of directors

Financials

FISCAL YEAR START: 07/01
FISCAL YEAR END: 06/30
✓ Financials audited by an independent accountant

FINANCIALS QUICK VIEW

Total revenue, gains, and other support per audited financial statements	\$1,666,983
Total expenses and losses per audited financial statements	\$1,903,655
Surpluses in last 5 years	2
Negative Net Assets in past 5 years	4

Financial Trends Analysis

Business Model Indicators

Created in Partnership with
 Nonprofit Finance Fund®

Profitability	2019	2020	2021	2022	2023
Unrestricted surplus (deficit) before depreciation	\$210,606	-\$124,417	\$276,393	-\$45,747	-\$226,672
As a % of expenses	11.1%	-6.9%	27.1%	-2.7%	-11.9%
Unrestricted surplus (deficit) after depreciation	\$210,606	-\$124,417	\$276,393	-\$45,747	-\$226,672
As a % of expenses	11.1%	-6.9%	27.1%	-2.7%	-11.9%
Revenue Composition					
Total revenue (unrestricted & restricted)	\$2,108,582	\$1,686,267	\$1,284,753	\$1,590,940	\$1,666,983
Total revenue, % change over prior year	0.0%	-20.0%	-23.8%	23.8%	4.8%
Program services revenue	0.0%	0.0%	0.0%	0.0%	0.0%
Membership dues	0.0%	0.0%	0.0%	0.0%	0.0%
Investment income	0.0%	0.0%	0.0%	0.0%	0.1%
Government grants	0.0%	0.0%	0.0%	0.0%	0.0%
All other grants and contributions	100.2%	99.3%	99.6%	99.6%	99.3%
Other revenue	-0.2%	0.7%	0.4%	0.4%	0.6%
Expense Composition					
Total expenses before depreciation	\$1,897,976	\$1,798,492	\$1,020,552	\$1,676,687	\$1,903,655
Total expenses, % change over prior year	0.0%	-5.2%	-43.3%	64.3%	13.5%
Personnel	21.1%	18.9%	33.3%	21.7%	17.5%
Professional Fees	3.2%	2.8%	4.0%	3.4%	6.4%
Occupancy	0.0%	0.0%	0.0%	0.0%	0.0%
Interest	0.0%	0.0%	0.0%	0.0%	0.3%
Pass-Through	5.3%	10.8%	14.0%	12.8%	9.2%
All other expenses	70.4%	67.5%	48.7%	62.1%	66.6%

Financial Trends Analysis, continued

Moving Toward Full Cost Coverage

Full Cost Components (estimated)	2019	2020	2021	2022	2023
Total Expenses (after depreciation)	\$1,897,976	\$1,798,492	\$1,020,552	\$1,676,687	\$1,903,655
One Month of Savings	\$158,165	\$149,874	\$85,046	\$139,724	\$158,638
Debt Principal Repayment	\$0	\$35,000	\$0	\$0	\$19,904
Fixed Asset Additions	\$0	\$0	\$0	\$0	\$0
Total Full Costs (estimated)	\$2,056,141	\$1,983,366	\$1,105,598	\$1,816,411	\$2,082,197

Capital Structure Indicators

Liquidity					
Months of cash	0.6	1.5	4.8	1.9	0.4
Months of cash and investments	0.6	1.5	4.8	1.9	0.4
Months of estimated liquid unrestricted net assets	-0.5	-2.0	-0.2	-0.5	-1.9
Balance Sheet Composition					
Cash	\$98,623	\$226,243	\$404,569	\$261,378	\$65,827
Investments	\$0	\$0	\$0	\$0	\$0
Receivables	\$36,309	\$22,230	\$29,073	\$1,200	\$52,570
Gross land, buildings, and equipment (LBE)	\$101,015	\$101,015	\$101,015	\$101,015	\$13,568
Accumulated depreciation (% of LBE)	100.0%	100.0%	100.0%	100.0%	100.0%
Liabilities (as % of assets)	145.3%	170.7%	81.6%	101.8%	207.2%
Unrestricted net assets	-\$71,178	-\$295,595	-\$19,202	-\$64,949	-\$300,092
Temporarily restricted net assets	\$0	N/A	N/A	N/A	N/A
Permanently restricted net assets	\$0	N/A	N/A	N/A	N/A
Total restricted net assets	\$0	\$112,192	\$100,000	\$60,000	\$50,000
Total net assets	-\$71,178	-\$183,403	\$80,798	-\$4,949	-\$250,092

Key Data Checks

Material Data Errors	2019	2020	2021	2022	2023
	No	No	No	No	No

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- ☒ [Formulas for key metrics](#)
- ☒ ['Key Revenue & Expense Data from Form 990'](#)
- ☒ ['Key Balance Sheet Data from Form 990'](#)

Operations

Source: Self-Reported by Organization, September 2023

EXECUTIVE DIRECTOR

Amanda Napolitano

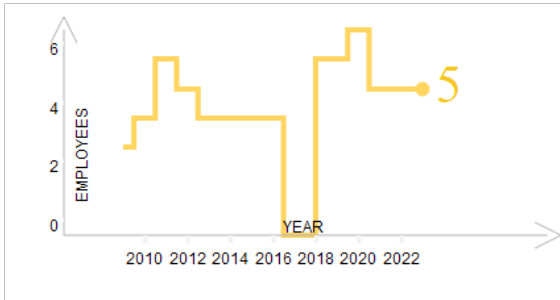
[LinkedIn profile](#)

The City of Jacksonville will finish breast cancer, and Amanda Napolitano is racing to make that happen. Amanda is the Executive Director for The DONNA Foundation, a nonprofit organization producing the only marathon in the U.S. dedicated to breast cancer research, awareness and care. The Foundation provides assistance and support to families living with breast cancer, funds groundbreaking breast cancer research at the Mayo Clinic, and celebrates survivorship. Amanda earned her associates degree from Florida State University, and her Bachelor's of Science in Technical Communication from Mercer University in Macon, GA. Her professional memberships include Running USA, Road Runners Club of America, and the Nonprofit Center of Northeast Florida.

An avid runner and mother of two girls, Amanda is proud of the legacy she is helping to leave for her community, and in 2008 was awarded the 'Spirit of Galloway' award from Olympian Jeff Galloway for her work.

NUMBER OF EMPLOYEES

Source: IRS Form 990



BOARD CHAIR

Amy Mergen

FIS

Term: 2016 - 2022

BOARD CO-CHAIR

Teri Sowder

Dixon Hughes Goodman LLP

Term: 2016 - 2025

BOARD MEMBERS

Melissa Circelli

Black Knight Financial Services

Andy Marelo

PGA Tour

Allen Skipper

Expedient

Chris Twiggs

Jeff Galloway Productions

Amy Mergen

FIS

Edith Perez

Mayo Clinic, Emeritus

Jim Gilmore

Infinity Global Solutions, LLC, Emeritus

Molly Walker

iHeart Media

Teri Sowder

Dixon Hughes Goodman

Rees Mason

Merrill Lynch

Janice Cobb

Equitable

Lauren Hayes

FIS

Christopher Turner

AARP

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2023

Name	Title	Compensation	Other	Related
Amanda Napolitano	Executive director	\$100,876	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2022

Name	Title	Compensation	Other	Related
Amanda Napolitano	Executive director	\$91,000	\$0	\$0
Chris Twiggs	Secretary	\$0	\$0	\$0
Andy Marello	Treasurer	\$0	\$0	\$0
Amy Mergen	Chairperson	\$0	\$0	\$0
Melissa Circelli	Director	\$0	\$0	\$0
Allen Skipper	Director	\$0	\$0	\$0
Christopher Turner	Director	\$0	\$0	\$0
Janice Cobb	Director	\$0	\$0	\$0
Lauren Hayes	Director	\$0	\$0	\$0
Molly Walker	Director	\$0	\$0	\$0
Rees Donofrio	Director	\$0	\$0	\$0
Teri Sowder	Vice-Chairperson	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2021

Name	Title	Compensation	Other	Related
Chris Twiggs	Secretary	\$0	\$0	\$0
Andy Marello	Treasurer	\$0	\$0	\$0
Amy Mergen	Chairperson	\$0	\$0	\$0
Melissa Circelli	Director	\$0	\$0	\$0
Allen Skipper	Director	\$0	\$0	\$0
Christopher Turner	Director	\$0	\$0	\$0
Janice Cobb	Director	\$0	\$0	\$0
Lauren Hayes	Director	\$0	\$0	\$0
Molly Walker	Director	\$0	\$0	\$0
Rees Mason	Director	\$0	\$0	\$0
Teri Sowder	Vice-Chairperson	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2020

Name	Title	Compensation	Other	Related
Chris Twiggs	Secretary	\$0	\$0	\$0
Deborah Nicol	Director	\$0	\$0	\$0
Andy Marello	Treasurer	\$0	\$0	\$0
Amy Mergen	Chairperson	\$0	\$0	\$0
Melissa Circelli	Director	\$0	\$0	\$0
Nick Furriss	Director	\$0	\$0	\$0
Allen Skipper	Director	\$0	\$0	\$0
Christopher Turner	Director	\$0	\$0	\$0
Janice Cobb	Director	\$0	\$0	\$0
Jeff McCall	Director	\$0	\$0	\$0
Lauren Hayes	Director	\$0	\$0	\$0
Molly Walker	Director	\$0	\$0	\$0
Rees Donofrio	Director	\$0	\$0	\$0
Teri Sowder	Vice-Chairperson	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2019

Name	Title	Compensation	Other	Related
Donna Deegan	Founder	\$0	\$0	\$0
Chris Twiggs	Secretary	\$0	\$0	\$0
Deborah Nicol	Director	\$0	\$0	\$0
Antonia Hernandez	Director	\$0	\$0	\$0
Andy Marello	Director	\$0	\$0	\$0
Amy Mergen	Chair	\$0	\$0	\$0
Edith Perez	Director	\$0	\$0	\$0
Melissa Circelli	Director	\$0	\$0	\$0
Nick Furriss	Director	\$0	\$0	\$0
Allen Skipper	Director	\$0	\$0	\$0
Jim Gilmore	Director	\$0	\$0	\$0
Charlyn Barrett	Vice Chair	\$0	\$0	\$0

Paid Preparers
FISCAL YEAR 2023

Firm Name	Firm EIN	Firm Address	Firm Phone
Masters Smith & Wisby PA	59-1466001	4651 Salisbury Road Suite 185, Jacksonville FL 32256 USA	904-396-2202

Paid Preparers
FISCAL YEAR 2022

Firm Name	Firm EIN	Firm Address	Firm Phone
Masters Smith & Wisby PA	59-1466001	4651 Salisbury Road Suite 185, Jacksonville FL 32256 USA	904-396-2202

Paid Preparers
FISCAL YEAR 2021

Firm Name	Firm EIN	Firm Address	Firm Phone
Masters Smith & Wisby PA	59-1466001	4651 Salisbury Road Suite 185, Jacksonville FL 32256 USA	904-396-2202

BOARD LEADERSHIP PRACTICES

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

BOARD ORIENTATION & EDUCATION

Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?

Yes

CEO OVERSIGHT

Has the board conducted a formal, written assessment of the chief executive within the past year?

Yes

ETHICS & TRANSPARENCY

Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?

Yes

BOARD COMPOSITION

Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?

Yes

BOARD PERFORMANCE

Has the board conducted a formal, written self-assessment of its performance within the past three years?

No

Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

The organization's leader identifies as:

Race & Ethnicity	White/Caucasian/European
Gender Identity	Female, Not transgender
Sexual Orientation	Heterosexual or Straight
Disability Status	Person without a disability

Race & Ethnicity

No data

Gender Identity

Transgender Identity

No data

Sexual Orientation

No data

Disability

No data.

Equity Strategies *Last Updated: 09/07/2023*

Candid partnered with Equity in the Center - a project that works to shift mindsets, practices, and systems within the social sector to increase racial equity - to create this section. [Learn More](#)

Policies and processes

- ✓ We seek individuals from various race backgrounds for board and executive director/CEO positions within our organization.

Appendix

Key Documents

IRS Forms 990	2023 990
	2022 990
	2021 990
	2020 990
	2019 990
IRS Forms 990T	Not Available
Audited Financial Statements	2022 Audited Financial Statement
	2021 Audited Financial Statement
	2020 Audited Financial Statement
Key Organization Documents	Letter of Determination
	2022 Annual Report
	'Key Revenue & Expense Data from Form 990'
	'Key Balance Sheet Data from Form 990'

THE DONNA FOUNDATION, INC.

1015 Atlantic Blvd #58
Atlantic Beach, FL 32233

✓ Foundation Status Code: PC*

✓ Public charity described in section 509(a)(1) or (2)

IRS Publication 78 Details

IRS Pub 78 verified

Organization name	Location	Most recent IRS Publication 78
The Donna Foundation Inc.	Atlantic Beach, FL	March 2024
EIN	<u>Deductibility status description</u>	Verified with most recent Internal Revenue Bulletin
26-2736601	A public charity (50% deductibility limitation).	March 25, 2024

IRS Business Master File Details

IRS BMF509(a)(1)

Organization name	Most recent IRS BMF	Reason for Non-Private Foundation Status
THE DONNA FOUNDATION INC	March 12 2024	Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)
EIN	IRS subsection	Ruling date
26-2736601	This organization is a <u>501(c)(3) Public Charity</u>	08/2008
This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.		

On September 8, 2011, the IRS issued [regulations](#) which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](#)

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

[IRS Revenue Procedure 2011-33](#) allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.

-[IRS Publication 78 \(Cumulative List of Organizations\)](#) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.

-The [IRS Internal Revenue Bulletin](#) (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.

-The [IRS Business Master File](#) lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The [IRS Automatic Revocation of Exemption List](#) contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.

-The Foundation Status Code is a value derived by mapping the codes found on the [990PF filing instructions](#) to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.

-The Office of Foreign Assets Control (OFAC) [Specially Designated Nationals \(SDN\) list](#) organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.