



Charitable Foundation

Annual Report

July 1, 2018 - June 30, 2019

The Copperleaf Charitable Foundation, founded in 2004, is a 501(c)3 (not-for-profit) organization that distributes funds for the benefit of local charities. The Foundation raises funds through memorials, fundraisers, businesses and Copperleaf residents. The following is a brief synopsis of last year's fiscal activities.

Financial

- Total donations received in the fiscal year were \$110,844.
- This number included \$24,750 from 27 corporate sponsors.
- There was a 40% participation rate from Copperleaf members.
- Contributions during the year can be broken out as follows:

General Fund	\$6,854
2019 Annual Drive	\$34,390
Harry Chapin Hunger Walk	\$13,030
Copper Tree Contributions	\$18,000
Home Tour Raffle	\$3,720
Home Tour Tickets	\$10,100
Business Sponsors	\$24,750
Total	\$110,844

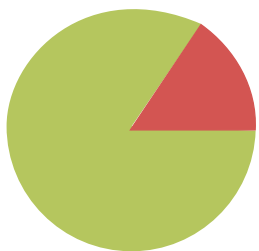


Members who opened their residences for the Home Tour

Investments/Endowment Fund

- As of June 30, 2019, the closing value of the fund was \$308,219.
- The annualized rate of return since its inception in 2012 is 9.3%.
- On an annual basis, the CCF bylaws provide the following: 5% of the average three year endowment balance can be transferred annually to the CCF's General Fund for distribution to local charities; or retained in the Endowment Fund for future growth. In the fiscal year ending June 2019, \$10,834 was retained in the Endowment Fund.
- During the 2019 fiscal year, a total of \$23,950 was transferred to the Endowment Fund by member donors. Since its inception, net donations to the Endowment Fund total \$211,584

Sources of Revenue



Local Businesses	\$24,750	22%
Copperleaf Members	\$87,844	78%

Local Businesses

FineMark Bank	\$5,000
Summit Wealth	\$2,500
Summit Broadband	\$2,000
Northern Contracting	\$2,500
Other 23 vendors	\$12,750
Total	\$24,750

Copper Tree

- Leaves were added in the memory of Paula Axtell, Mary Ann Cross, Vince Shanley and Ralph Fazzolari.
- Honorariums were also added, with appreciation, by the following members: Carol and Bob Gerbel, Jim Nelson, Susan and Richard Hughes, Helga and John Reynolds, Gerald Gluhanich, Janet and James Zilinski, Mildred and Alton Wendzel, John Bykowski, Barbara and Jeffrey Miller, Peggy and Robert Keach and Marijane and Fred Glantz.

Copperleaf Cares - Making a Difference

Grants for 2019

Bonita Springs Assistance	\$5,000	Harry Chapin Hunger Walk	\$13,030
Literacy Council	\$5,000	Café of Life	\$5,000
Community Cooperative	\$7,000	Our Mother's Home of SW FL	\$5,000
Interfaith Charities	\$4,000	Society of St. Vincent DePaul	\$3,000
Home Base (Wounded Vets)	\$9,000	Abuse, Counseling, Treatment (ACT)	\$10,000
Sewing Bee	\$1,132	New Horizons	\$5,000
Harry Chapin Food Bank	\$2,000	Total	\$74,362

Activities and Events

Monthly meetings are held the first Tuesday of each month

November 2019 - April 2020

- Veteran's/Home Base Golf Outing
- Copperleaf Christmas Donations
- Annual Report presentations
- Harry Chapin Hunger Walk
- Sewing Bee
- Annual Appeal
- Copper Tree Presentations
- Home Tour
- Grants Distributed
- ACT Shelter Project

November 17, 2018

December 2018

January-February 2019

January 19, 2019

January 30, 2019

February 2019

Ongoing

March 10, 2019

March 2019

June 14, 15, 2019

Communications and Marketing

- Blasts, Leaf articles, brochures and flyers are devices used to keep our constituency up-to-date.
- Copperleaf Charitable Foundation's Facebook page is used to share information and photos.
- Brief updates regarding the Foundation are presented at the annual meetings of each neighborhood in Copperleaf.

Summary of long-term goals for the Copperleaf Charitable Foundation

- Make a difference to deserving charities.
- Be well organized and appreciated throughout Copperleaf and the local community.

Board of Trustees

Rae Ann McCall, President

Doreen Evans, Vice President/Secretary

Richard Hughes, Treasurer

Shirley Burrell

Kati Capps

Fred Glantz

John Rae

William A. Starr



Ladies 9 Hole Golf League delivering Easter baskets to children in the abuse shelter (ACT).