



COPPERLEAF CARES

Copperleaf Charitable Foundation

Copperleaf Charitable Foundation Annual Report (July 1, 2021 – June 30, 2022)

Due to your generosity, the Copperleaf Charitable Foundation (CCF) raised and distributed \$212,500 to local charities and volunteered at many events to support our charities.



Since 2004 the CCF, a tax exempt 501(c) 3 non-profit organization, has raised funds and made grants of more than \$1.3 million to support local charities. The Foundation is staffed entirely by Copperleaf volunteers. Every member of the Copperleaf Community Association is a member of the CCF.

FY 2022 Revenue

- Copperleaf member participation rate (donations and events) increased from 66% to 76%.
- 162 Copperleaf households (28%) donated to the Foundation's Annual Appeal.
- Donations of \$144,800, Event income of \$115,200 (including \$68,100 in donations) and investment income of \$30,000 increased total revenue to \$290,000, the largest ever.
- Eighteen Businesses donated \$29,100
- \$ 50,900 of donations were designated for the Endowment fund. 92 Copperleaf households donated to Memorial Leafs.

FY 2022 Grants and Other Expenses

- The CCF made \$212,500 in grants to the following charities:

Abuse Counseling & Treatment Center	Kids' Minds Matter
Bonita Springs Assistance Office	Literacy Council Gulf Coast
Café of Life	New Horizons of SWFL
Community Cooperative	Our Mother's Home of SWFL
Harry Chapin Food Bank	Partners for Breast Cancer Care
Home Base	Society of St. Vincent DePaul (LOL)
Interfaith Charities of South Lee County	
- There were other program expenses of \$3,800.
- Management and General Expenses totaled \$7,500, 2.6% of revenue.

Investments/Endowment Fund

- The closing value of the Endowment Fund was \$426,249, a decrease of \$32,034 during the fiscal year. The decrease was due to investment losses, and \$18,422 distributed from the Fund that was used for grants to local charities, partially offset by donations designated for the endowment fund.

Copper Tree

- The Copper Tree featured in the Clubhouse recognizes contributions to the Endowment Fund. Honorarium Leaves are in the name of living members. Memorial Leaves are in the name of deceased members. The CCF received \$50,900 in donations to the Copper Tree.
- This fiscal year donations were received for four memorial leaves for the following: Donna Anderton, Carol Gemelli, John Humphreys and Carol Lingbeck. Five Honorarium leaves were added for: Candice & Stephen Bruns, Bill & Judy Hoewischer, Regina & Thomas Leonard, Kelli & Jim Matthew, and Joanne & Dan McPhail. In addition, donations were received to upgrade three memorial leaves and one honorarium leaf. Shortly after year-end, donations were received for two memorial leaves for Joe Bage and Bruce Kephart. Several of the memorial leaves are awaiting installation pending family visits.

Activities and Events

- The CCF sponsored the following fundraising events: Home Base Veterans Golf Outing, The Love Boat Dine & Dance, The Copperleaf Hunger Walk/Ride to support HCFB, The Lifestyle Expo and a 50/50 Cash Raffle.
- The CCF sponsored the following volunteer events: Thanksgiving Dinner for Café of Life, Interfaith Charities Holiday/Christmas Food Distribution, Sewing Bee to benefit patients at Golisano Children's Hospital and ACT, and Community Cooperative Food preparation.

Goals

- Assist our Charities to meet their needs of the surrounding communities due to Hurricane Ian.
- Update the Strategic Plan.
- Coordinate donation efforts and activities with the CLGA, CL9 and others.
- Update and improve the CCF website (Home | Copperleaf Charitable Foundation copperleaaffoundation.org) so that it is more visible and useful for members.
- Maintain communications with nearby Foundations to share ideas.
- Communicate the CCF's participation in the Amazon Smiles program so that members designate .5% of their Amazon purchases to the CCF.

CCF Officers and Board of Trustees – FY 2022-2023

Bill Starr – President & Trustee Barb Brown- Vice President & Trustee Mary Ann Wagner – Secretary & Trustee Mark Grzesiak – Treasurer & Trustee Joe Gallagher - Trustee Ann Kalin - Trustee	Frank Morrison - Trustee Bill O'Dell – Trustee Randy Schumacher - Trustee Sherri Veit - Trustee Jeff- Younger - Trustee