

## Copperleaf Charitable Foundation Annual Report (July 1, 2023 – June 30, 2024)

***Due to your generosity, the Copperleaf Charitable Foundation (CCF) raised and distributed \$248,000 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 \$1.8 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.

At the January 2024 Copperleaf Hunger Walk for Harry Chapin Food Bank, HCFB awarded us with our first ever Gold Record Award, putting us in the esteemed company of other major donors like Publix for our commitment to our SWFL neighbors dealing with food insecurity. Copperleaf is the first gated community to receive this award. WINK News covered this event again this year.

### FY 2024 Revenue

- Copperleaf household participation rate (donations and events) decreased from 83% to 68%. The prior year had a Home Tour and Raffle which increased participation.
- 229 Copperleaf households (41%) donated to the Foundation's Annual Appeal. An increase from last year.
- Donations of \$178,900, Event income of \$99,700 (including contributions) and investment income of \$16,500 made up total revenue to \$295,100, \$11,900 less than last year.
- Eleven Businesses made cash donations of \$27,800. Six businesses and one member donated silent auction items for the "One Enchanted Evening" Dine and Dance that netted \$14,800 in winning bids.
- \$ 46,900 of donations were designated for the Endowment fund. 76 Copperleaf households donated to Memorial Leaves.

### FY 2024 Grants and Other Expenses

- The CCF made \$248,000 in grants in the following categories (see the financial summary for a detailed list of recipients):
 

Food & Basic Needs	\$114,000
Healthcare	\$ 95,000
Education	\$ 36,000
- There were other program expenses of \$6,200.

- Management and General Expenses totaled \$9,300, 3.1% of revenue.

**Investments/Endowment Fund**

- The closing value of the Endowment Fund was \$562,5000, an increase of \$65,400 during the fiscal year. The increase was due to investment gains of \$60,400, and contributions of \$46,900, partially offset by \$24,100 distributed from the Fund that was used for grants to local charities and amounts pending transfer from the general fund to 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 \$47,900 in donations to the Copper Tree.
- This fiscal year donations were received for memorial leaves for the following: A Group Copper Leaf for the November accident victims (Maria Burgeson, Mary Engdahl, Suzie Galla and Diane Powers), and a Silver leaf for Mike Galla. Four Gold Honorarium leaves were added for Ron Campbell & Patty McPherson, Maxine Saul, George & Diane Silca, and Richard & Mary Ann Wagner. John & Nancy Howald’s Silver Honorarium leaf was upgraded to Gold and Jim & Jan Zilinski’s Gold Honorarium leaf was upgraded to Copper. These leaves are awaiting installation pending the reopening of the clubhouse.

**Activities and Events**

- The CCF sponsored the following fundraising events: The January Copperleaf Hunger Walk/Ride to support HCFB, and the March “One Enchanted Evening” Dine & Dance.
- In early September, the CCF hosted its annual Home Base Golf Outing to show appreciation to veterans by having them join our members for a round of golf and lunch afterwards. WINK News covered the event and Home Base received a great deal of visibility to WINK News viewers.
- 166 Copperleaf members volunteered 366 times at the following group volunteer events: Monthly Lunch preparation and Serving for Café of Life at Leitner Park, Community Cooperative Bread cutting in the tent, Thanksgiving Dinner for Café of Life, Christmas Stockings for Interfaith Charities Holiday/Christmas Party, Sewing Bee to benefit patients at Golisano Children’s Hospital and ACT, Community Cooperative Food preparation, Easter baskets for ACT, and packing food at the HCFB warehouse.

**Goals**

- Update the Strategic Plan using feedback from last year’s survey.
- Increase 2025 grants to local charities to \$260,000.
- Increase the Copperleaf Household participation rate from 68% to 75% in 2025.
- Define and implement a long-term succession plan.
- Maintain communications with nearby Foundations to share ideas.

**CCF Officers and Board of Trustees – FY 2024-2025**

William Starr	Trustee - President
Barbara Brown	Trustee-Vice President
Bill O’Dell	Trustee - Secretary
Mark Grzesiak	Trustee - Treasurer
Marcia Allison	Trustee
Denny Engel	Trustee

Joe Gallagher	Trustee
Ann Kalin	Trustee
Donna Kasle	Trustee
Dave Maher	Trustee
Randy Schumacher	Trustee