


COPPERLEAF CARES
Copperleaf Charitable Foundation

**Copperleaf Charitable Foundation Annual Report
(July 1, 2022 – June 30, 2023)**

Due to your generosity, the Copperleaf Charitable Foundation (CCF) raised and distributed \$248,500 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 \$1.5 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 2023 Revenue

- Copperleaf member participation rate (donations and events) increased from 76% to 83%.
- 180 Copperleaf households (31%) donated to the Foundation's Annual Appeal.
- 21 Copperleaf households donated \$20,100 to CCF charities to support their Hurricane Ian Relief efforts.
- Donations of \$179,900, Event income of \$105,800 (including \$79,700 in donations) and investment income of \$21,300 increased total revenue to \$307,000, the largest ever.
- Twenty-one Businesses made cash donations of \$36,700. Twelve businesses made donations of auction items totaling more than \$6,400.
- \$ 44,500 of donations were designated for the Endowment fund. 156 Copperleaf households donated to Memorial Leaves.

FY 2023 Grants and Other Expenses

- The CCF made \$248,500 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 (OLOL)
Interfaith Charities of South Lee County	

- There were other program expenses of \$6,300.
- Management and General Expenses totaled \$10,100, 3.3% of revenue.

Investments/Endowment Fund

- The closing value of the Endowment Fund was \$497,000, an increase of \$70,800 during the fiscal year. The increase was due to investment gains of \$46,600 and contributions of \$44,500, partially offset by \$22,200 distributed from the Fund that was used for grants to local charities.

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 \$44,500 in donations to the Copper Tree.
- This fiscal year donations were received for four memorial leaves for the following: ,Joe Bage, Ron Broadway, Bruce Kephart, and Lois Kipp. Three Honorarium leaves were added for:Pam & Dave Baker, Richard & Nancy Johnson (upgrade) and Jim & Jan Zilinski (upgrade). Several leaves are awaiting installation pending reopening of the clubjouse..

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 Home Tour 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, Community Cooperative Food preparation, Easter baskets for ACT, and packing food at the HCFB warehouse.

Goals

- -Conduct a survey of Copperleaf Members to get their feedback on the CCF.
- Update the Strategic Plan using feedback from the survey.
- Update and improve the CCF website ([Home | Copperleaf Charitable Foundation \(copperleaffoundation.org\)](http://Home | Copperleaf Charitable Foundation (copperleaffoundation.org))) so that it is more visible and useful for members.
- Maintain communications with nearby Foundations to share ideas.

CCF Officers and Board of Trustees – FY 2023-2024

William Starr	Trustee - President
Barbara Brown	Trustee-Vice President
Jeff Younger	Trustee - Secretary
Mark Grzesiak	Trustee - Treasurer
Marcia Allison	Trustee
Denny Engel	Trustee

Joe Gallagher	Trustee
Ann Kalin	Trustee
Bill O'Dell	Trustee
Randy Schumacher	Trustee
Sherri Veit	Trustee