



COPPERLEAF CARES

Copperleaf Charitable Foundation

Copperleaf Charitable Foundation Annual Report (July 1, 2019 – June 30, 2020)

Due to the unprecedented generosity of Copperleaf members, the Copperleaf Charitable Foundation (CCF) raised and distributed more money to local charities this fiscal year than ever before.



Since 2004 the CCF, a tax exempt 501(c) 3 non-profit organization, has raised funds and made grants of almost \$1 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 2020 Revenue

- Copperleaf member participation rate increased from 40% to 57%.
- Total donations of \$155,200 were the highest ever due to the COVID-19 Special Appeal & Happy Hour (\$52,700).
- Ten Businesses donated \$26,500.
- \$37,940 of donations were designated for the Endowment fund and \$22,700 to the Harry Chapin Hunger Walk.
- Event income of \$15,700 and investment income of \$12,100 increased total revenue to \$183,000.

FY 2020 Grants and Other Expenses

- The CCF made \$154,400 in grants to the following charities, which is more than 50% higher than ever before:

Abuse, Counseling & Treatment Center, Inc.	Interfaith Charities of South Lee County
Bonita Springs Assistance Office	Literacy Council Gulf Coast
Café of Life	New Horizons of SWFL
Community Cooperative, Inc.	Society of St. Vincent DePaul (OLOL)
Harry Chapin Food Bank	Our Mother's Home of SWFL
Home Base	
- Administrative costs totaled \$4,200, only 2.3% of revenue.

Investments/Endowment Fund

- The closing value of the Endowment Fund was \$338,817, an increase of \$30,598 during the fiscal year. The increase was achieved due to designated donations and investment returns, partially offset by \$30,000 taken from the Fund that was used for COVID-19 related grants to local charities.
- Since its inception in 2012, the Fund has achieved an annualized rate of return of 8.0%.

Copper Tree

- The Copper Tree featured in the Clubhouse recognizes donations to the Endowment Fund. Honorarium Leafs are in the name of living members. Memorial Leafs are in the name of deceased members.
- This fiscal year a memorial leaf was added in the memory of John Glick and an honorarium leaf was added to recognize Judy and Bill Starr.
- Due to Covid-19, the following Memorial leaves are awaiting installation: Rich Burgeson, Al Ringler, Vince Shanley and Greg Vogel. An Honorarium leaf for Judy and Stan Ruskin is also awaiting installation.

Activities and Events

- The CCF sponsored the following events: Home Base Veterans Golf Outing, WINK Harry Chapin Hunger Walk, Rae's Sewing Bee, Copperleaf Has Talent -Cabaret, FineMark Fraud & Identity Theft Presentation.
- The CCF provided accounting for the Annual Fashion show and proceeds were donated to ACT.
- At the start of Covid-19, the CCF sponsored a food drive for Café of Life.
- Due to Covid-19, several events were cancelled.

Goals for 2020 - 2021

- Implement the Strategic Plan that was developed in the Fall of 2019 and updated in October 2020.
- Recruit Neighborhood Captains so that every HOA and Associates have a CCF representative.
- Improve the CCF website so that it is more visible and useful for members.
- Establish and maintain communications with nearby Foundations to share ideas.

Board of Trustees

Bill Starr - President	Barb Brown
Fred Glantz- Vice President	Joe Gallagher
Mary Ann Wagner - Treasurer	Frank Morrison
Doreen Evans - Secretary	John Rae