



COPPERLEAF CARES
Copperleaf Charitable Foundation

**Copperleaf Charitable Foundation Annual Report
(July 1, 2020 – June 30, 2021)**

Due to your generosity, the Copperleaf Charitable Foundation (CCF) raised and distributed more than \$136,000 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 \$1.1 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 2021 Revenue

- Copperleaf member participation rate increased from 57% to 66%.
- Total donations of \$135,000 were the second highest ever, surpassed only by last year that saw \$52,700 in incremental donations to the COVID-19 Special Appeal & Happy Hour.
- Twelve Businesses donated \$32,200.
- \$32,500 of contributions were designated for the Endowment fund.
- Event income of \$35,900 (including \$14,500 in donations) and investment income of \$17,200 increased total revenue to \$188,100.

FY 2021 Grants and Other Expenses

- The CCF made \$136,600 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 \$2,800.
- Management and General Expenses totaled \$10,200, 5.4% of revenue.

Investments/Endowment Fund

- The closing value of the Endowment Fund was \$458,300, an increase of \$119,500 during the fiscal year. The increase was achieved due to investment returns and designated donations, partially offset by \$15,300 distributed from the Fund that was used for grants to local charities.
- Since its inception in 2012, the Fund has achieved an annualized rate of return of 11.2%.

Copper Tree

- The Copper Tree featured in the Clubhouse recognizes contributions to the Endowment Fund. Honorarium Leafs are in the name of living members. Memorial Leafs are in the name of deceased members. The CCF received \$32,500 in donations to Copper Tree leafs.
- This fiscal year donations were received for seven memorial leafs for the following: Chuck Bender, Rich Burgeson, Charlie Horton, John Maggio, Jim McInnis, Jack Meeker, and Paul Thomson. Four Honorarium leafs were added for: Barbara & Stephen Brown, Hugo & Anna Marie Finarelli, Margaret & Joseph Gallagher, and Marion & Lothar Koob. Several of the memorial leafs are awaiting installation pending family visits.

Activities and Events

- The CCF sponsored the following fundraising events: Home Base Veterans Golf Outing, The Copperleaf Hunger Walk/Ride to support HCFB, 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 and distribution.
- Due to Covid-19, several fundraising events were cancelled as well as an educational event and thank you party for our volunteers.

Goals

- Update the Strategic Plan.
- Recruit Neighborhood Captains so that every HOA & Associates have a CCF contact.
- Coordinate donation efforts and activities with the CLGA, CL9 and others.
- Update and improve the CCF website 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

Bill Starr – President & Trustee	Barb Brown - Trustee
Fred Glantz- Vice President & Trustee	Joe Gallagher - Trustee
Mary Ann Wagner – Secretary & Trustee	Ann Kalin - Trustee
Mark Grzesiak – Treasurer & Trustee	Frank Morrison - Trustee
Bob Girsch – Investment Manager	Bill O'Dell - Trustee
	Sherri Veit - Trustee
	Jeff- Younger - Trustee