

PLANTATION COMMUNITY FOUNDATION



Founded 1988

ANNUAL REPORT 2024

July 1, 2023 – June 30, 2024

“Together we make a difference
across our community”

THE PLANTATION COMMUNITY FOUNDATION, INC. 500 ROCKLEY BOULEVARD, VENICE, FL 34293

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WWW.PLANTATIONCOMMUNITYFOUNDATION.ORG

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Dear Member,

On behalf of the Plantation Community Foundation Board of Directors, we present to you the 2024 Annual Report.

“The Plantation Community Foundation is an organization dedicated to improving the life of South Sarasota County Residents by supporting organizations involved in providing food, housing, and healthcare.”

The Fundraising season began in 2023 with our annual membership drive in September. Our membership numbers have continued to decline from the prior years. However, with the defined membership levels of Platinum, Gold, Silver and Bronze we realized a membership revenue gain.

We began the month of November with quite an engaging Casino night event. A fun time was had by all. We closed the month of November celebrating the Plantation Community Foundation’s 35th Anniversary. It was wonderful to see so many past presidents, former board members and volunteers in attendance. The passion for the Foundation was on display during this celebratory event.

In February our Olympic events of golf, tennis and pickleball were cancelled due to lack of participation. We concluded our fundraising season with the annual Grant Awards April 17th 2024. The diligent works of the Grant Committee, vetting all the requests from agencies and ranking award amounts, provided the Board with the data need to make the financial allocation to give to Pat Hurley, the leader of the Grant Committee. The Board approved \$120,000 in funding to support 42 charities.

“Together We Make a Difference Across Our Community.”

Best Regards,

Kathleen A. Braglia

President

THE PLANTATION COMMUNITY FOUNDATION ANNUAL REPORT

ABOUT THE FOUNDATION

The Plantation Community Foundation, incorporated in Florida on June 1, 1988, is an organization composed of residents of Plantation and surrounding neighborhoods, and members and employees of the Plantation Golf & Country Club, who, are dedicated to improving the quality of life in South Sarasota County.

VISION STATEMENT

"Together we make a difference across our community"

MISSION STATEMENT

"The Plantation Community Foundation is an organization dedicated to improving the life of South Sarasota County Residents by supporting organizations involved in providing food, housing, and healthcare."

PLANTATION COMMUNITY FOUNDATION LEADERSHIP

2023-2024 Directors & Officers

Kathleen Braglia, President
Gregg Richmond, Vice President
John Noyes, Treasurer
Donna Castellano, Secretary
Pat Hurley, Director
Irene Crowley, Director
Linda Zambaldi, Director

PRESIDENTS EMIRETI

Interim Donna Kubik, Ron Noble, Pete Petrie, Robert Hayden, Terry Williamson, Judy Thuer, Lee Williams (deceased), Mary Juday, Mary Helfrick (deceased), Robert Thinnies (deceased), Henry Dallam (deceased), Michael Casey (deceased), George Horan, Charles (Bob) Ellis (deceased), Clifford Reich (deceased), James Seamon (deceased), Richard Torrey (deceased)

OFFICE STAFF

Eva Kokkalas – Office Manager
Jan Anderson – Administrative Assistant/Website

About the Cover:

The tree logo, by the late, local artist Thomas Fern, depicts the Elephant Ear Tree. With its sturdy trunk, deep roots and horizontally-spreading branches, it symbolizes the Foundation's effort to reach out with financial support to area not-for-profit agencies.

2024 GRANT COMMITTEE

Chair - Pat Hurley

Members - Sue Sutton, Elaine Lapinski, Joe Castellano, Jan Lee, Bettine Brusca, Kristine Sperry, Joe Noto, Ruth Ruud.

COMMITTEES:

Grants – Pat Hurley

Membership - Donna Castellano

Finance - John Noyes, Treasurer

Community Service - Eileen Kruzynski (Huggy Bears)

Fund Raising Events – 2023-2024

Casino Night – November 2, 2023

Giving Drive

In December 2023 we donated \$1475 in Publix and Target gift cards to Senior Friendship Center and \$1250 worth of gift cards to Center of Hope. In addition, items such as toiletries, cleaning products, undergarments, and blankets were collected for both charities.

Grant Program

April 12, 2024 at the Annual Grant Awards Breakfast
\$120,000 was awarded to 45 charities

Impact Grant

An Impact Grant of \$8700 was awarded to Neuro Challenge with money donated in memory of Tom Kubik

2024 Applicants	PURPOSE	Amount Awarded
Adventure for All Corporation	To purchase 2 new branded tents to replace their damaged main event tent	2,500.00
Awaken Church Outreach Center	To purchase a pair of electric pallet jacks for moving supplies	3,300.00
Backpack Angels	To purchase hygiene products	2,400.00
Big Brothers Big Sisters of the Sun Coast, Inc.	To cover the costs of a key One to One Mentoring Program	2,500.00
Boys & Girls Clubs of Sarasota and DeSoto Counties	To provide scholarships for membership to their Great Futures Academy	3,000.00
Child Protection Center Inc.	To fund the Children and Families Supervised Visitation Program (CFSVP)	4,200.00
Children First	Funding for scholarships	3,000.00
Englewood Community Care Clinic, Inc	To purchase laboratory testing supplies	4,200.00
Epilepsy Services of Southwest Florida	Case management	2,500.00
Family Promise of South Sarasota County	To provide emergency funding as needed by client families	4,000.00
Girl Scouts of Gulfcoast Florida Inc	To help give girls access to the program regardless of socio-economic status	2,000.00
Good Samaritan Pharmacy	To help pay the expenses for leasing 2 programs that are needed to provide medical care for patients	4,000.00
Habitat for Humanity	To purchase windows for a Habitat home in South Sarasota County	1,200.00
Jewish Family and Children's Services of the Suncoast	To help fund The Adolescent Diversion and Assistance Program	2,500.00
Laurel Civic	To address the nutritional needs of 85 students	6,200.00
Literacy Volunteers of South Sarasota County	Textbooks, 50 seats in Learning Upgrade, new laptop	3,000.00
Loveland Center, Inc.	To make a current outdoor patio space usable year round by installing sun sails over the patio area	2,500.00
Making an Impact	To launch their new guide and fund 2024 updates, printing and technology	2,000.00
Mote Marine Laboratory	To support the C-STEM program. Curriculum development, delivery, staff time, and educational supplies	1,500.00
North Port Meals on Wheels	To provide 1,440 meals to 40 people.	4,500.00
On The Spot Aid Inc.	To purchase non-narcotic, prescription meds such as antibiotics.	2,000.00
Operation Warrior Resolution	To support the Combat Conscious Yoga Program	4,000.00
Our Mother's House	To help cover the cost of mental health counseling for mothers in the 2 year program	3,500.00
Pregnancy Solutions	To support clients who cannot afford prenatal care	1,500.00
Safe Place and Rape Crisis Center (SPARCC)	To support SPARCC's Victim Financial Assistance Program	3,000.00
Samaritan Counseling Services of the Gulf Coast	To fund a reduced rate for 70 counseling sessions for South County residents	2,000.00
Senior Friendship Centers, Inc.	To replace very old computers in the computer lab at the Venice Senior Center	2,500.00
Solve Maternity Homes	Case management and Mental Health Counseling	2,500.00
State College of Florida	To provide 5, \$150 scholarships for children to attend the SCF Coding Academy's summer stem camp	750.00
Teen Court Sarasota, Inc	The money will be spent on drug test kits	3,500.00
The Center of Hope South County	To purchase 2 picn tables, 3 wire shelves, 3 clothing racks, and 3 utility cabinets for supplies	2,500.00
The Haven	For the Venice Theater collaboration to give adults with developmental disabilities the experience of performing	2,500.00
The Hermitage Artist Retreat, Inc	To build an 8' x 12' stage for their actors and audience	2,000.00
The Twig Cares, Inc.	To purchase about 100 pairs of sneakers to stack their shelves	2,500.00
The Venice Chorale, Inc.	High School Apprentice Program	1,000.00
The Venice Symphony	To supplement partial or full scholarships for students who could not participate in VSYO and summer camp	2,500.00
The Warehouse of Venice	Member ID supplies, urine test cups, medical contractors to read urine test cups	2,000.00
The Wildlife Center of Venice - DBA The Paul A and Veronica H Wild life Center of Southwest Florida	To purchase and construct a wild rabbit pre-release habitat for recovering sick or injured rabbits	1,200.00
Tidwell Foundation	To fund the End of Life Doula program	1,000.00
Venice Area Mobile Meals Inc.	To help cover the costs of free meals	5,000.00
Venice Area Pregnancy Care Center	Funds will be used to purchase car seats, cribs, mattresses, bassinets, clothing, diapers, wipes, and supplemental nutrition	4,250.00
Venice High School Graduation Program	Funds will be used to pay for entertainment and rentals needed to make the event possible	800.00
Venice Musicale	To purchase sheet music and supplies used by performers at their free concerts	1,000.00
Venice Nokomis Community Preschool	Scholarships for students in need of care when parents are unable to pay full tuition	3,000.00
Women's Resource Center	Funds will be used to provide mental health counseling to low-income women in South County	2,500.00
		120,000.00

Plantation Community Foundation
Balance Sheet
As of June 30, 2024

	Jun 30, 24
ASSETS	
Current Assets	
Checking/Savings	
Cash & Accounts Receivable	
1010 · BoA Checking (9146)	32,747.81
1030 · BoA Savings - Honor/Mem (4030)	5,194.44
1060 · Non-Endowed Agency Fund	3,000.00
1090 · Petty Cash	100.00
Total Cash & Accounts Receivable	41,042.25
Total Checking/Savings	41,042.25
Accounts Receivable	
11400 · Grants Receivable	-73,627.00
Total Accounts Receivable	-73,627.00
Total Current Assets	-32,584.75
Fixed Assets	
1640 · Furniture & Fixtures	6,517.33
1745 · Accum deprec- furn,fix,equip	-6,517.33
Total Fixed Assets	0.00
Other Assets	
1950 · Endowment Fund	549,767.23
Total Other Assets	549,767.23
TOTAL ASSETS	517,182.48
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2010 · Accounts Payable	19.18
Total Accounts Payable	19.18
Other Current Liabilities	
2021 · Payroll Taxes Payable	156.06
2351 · Deferred Income - Dues	300.00
Total Other Current Liabilities	456.06
Total Current Liabilities	475.24
Long Term Liabilities	
27200 · Other Liabilities	4,717.47
Total Long Term Liabilities	4,717.47
Total Liabilities	5,192.71
Equity	
3001 · Fund Balance BOY	703,282.28
3010 · Increase in Fund Balance	246,559.45
3020 · Grants Distributed	-537,464.77
Net Income	99,612.81
Total Equity	511,989.77
TOTAL LIABILITIES & EQUITY	517,182.48

Plantation Community Foundation
Profit & Loss
 July 2023 through June 2024

	<u>Jul '23 - Jun 24</u>
Ordinary Income/Expense	
Income	
Endowment FundsGains/Losses	
6810 · Unrealized Gains - Endowment	33,183.02
6820 · Realized Gains - Endowment Fund	31,392.42
Total Endowment FundsGains/Losses	64,575.44
Interest,Divid & Other Income	
5310 · Interest Income - Savings	4.10
5320 · Dividends & Interest-Endowment	4,997.51
5810 · Admissions to Events/F&B	14,567.75
5816 · Artwork Revenues	5.00
Total Interest,Divid & Other Income	19,574.36
4010 · Contributions Honor/Memorial	6,771.00
4020 · Corporate Sponsors	3,500.00
4022 · Playing Sponsor	4,000.00
4230 · Contributions Endowment Fund	1,000.00
5210 · Membership Donations	50,317.00
5812 · Cash Raffles - 56 card raffle	3,100.00
5815 · Auction Revenues - Silent Aucti	9,581.00
5817 · Royal Ride Cart raffle	7,403.00
5818 · Cash Raffle - 50/50	1,150.00
5819 · Other Raffle - Special Raffle	1,800.00
5820 · Entry Fees	1,031.00
5830 · Donations	4,508.71
Total Income	178,311.51
Gross Profit	178,311.51
Expense	
Food, Beverage & Miscellaneous	
8320 · Food & Beverage	6,676.78
Total Food, Beverage & Miscellaneous	6,676.78
Insurance, License & Permits	
7520 · Bank Fees	3,306.30
8130 · Facility Fees	791.76
8515 · Licenses, Permits & Fees	408.07
8520 · Insurance	4,628.88
Total Insurance, License & Permits	9,135.01
Salaries,Benefits & Services	
7220 · Salaries & Wages	36,144.50
7250 · FICA & Medicare	2,755.41
7540 · Outside Services	2,162.96
7550 · Admin Expense-Endowment Fund	2,787.21
Total Salaries,Benefits & Services	43,850.08
Special Events	
8260 · Golf Cart Rental	1,650.00
8265 · Equipment Purchases	29.91
8537 · Decorations, Flowers, Etc.	1,045.98
8540 · Entertainment	9,725.00
8570 · Advertising & PR Memberships	365.00
8573 · Event Entry Fee Refund	1,031.00
8574 · Marketing	20.00
Total Special Events	13,866.89
Supplies, Printing & Mailing	
8110 · Supplies	271.20
8120 · Office Supplies	1,064.29
8140 · Postage	458.84
8170 · Stationery & Printing	269.19
Total Supplies, Printing & Mailing	2,063.52
8210 · Office Rental	1,100.00
8580 · Giving Drive / Donation	2,000.00
8595 · Miscellaneous Expense	6.42
Total Expense	78,698.70
Net Ordinary Income	99,612.81
Net Income	99,612.81

**Plantation Community Foundation Endowment
Gulf Coast Community Foundation**

**Fiscal Year 2024
July 1, 2023 - June 30, 2024**

Beginning Balance:	
July 1, 2023	\$555,608.49
<u>Additions:</u>	
Contributions	\$1,000.00
Interest & Dividends	\$4997.51
Realized Investment Gain/(Loss)	\$31,392.37
Unrealized Investment Gain/(loss)	\$33,183.02
<u>Disbursements:</u>	
Grants	\$73,627.00
Administrative Expense	\$2,787.20
Increase/(Decrease) for Period	-\$5,841.26
Ending Balance:	
June 30, 2024	<u>\$549,767.23</u>

NOTES:

**Unrealized Investment (Gain/Loss) is the change in market value of the underlying securities for securities held in the portfolio at month end.*

**Realized Gain/Loss on statements is a combination of 2 items: a) actual gains/losses realized as a result of security sales, less b) outside investment manager fees.*

2023-2024 BOARD OF DIRECTORS



Kathleen Braglia - President



Gregg Richmond – Vice President



Donna Castellano - Director



John Noyes -Treasurer



Pat Hurley - Director



Irene Crowley - Director



Linda Zambaldi - Director

2024 Grant Committee



Members L to R:

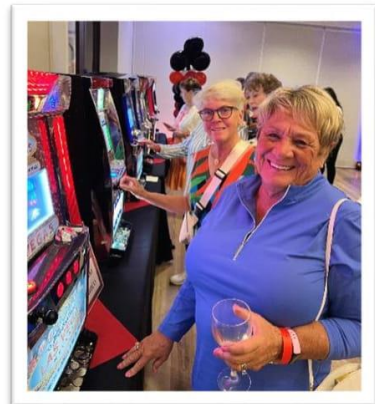
2023-24 Grant Committee Members: Sue Sutton, Elaine Lapinski, Joe Castellano, Chair-Pat Hurley, Jan Lee, Bettine Brusca, Kristine Sperry, Joe Noto, Ruth Ruud.

2024 GRANT AWARDS

In April 2024, The Plantation Community Foundation awarded \$120,000 to 45 Grant Awards Program applicants.

Plantation Community Foundation Fund Raising Events

Casino Night



35th Anniversary



Giving Drive



***Plantation Community
Foundation Members as
of June 30, 2024***

PLATINUM 750+

Marsh & Dick Ambrose
John & Patricia Bilello
Donald & Jean Broman
Robert Cross
Anthony DiGioia
Lin & Gerry Gruber
Robert & Susan Halkyard
Bruce Hamlin
John & Sharon Hammond
Shirley Kasko
Allen Kraska
Donna Kubik
John Lauer
Terry & Shirley Miller
Phil & Joan O'Brien
Richard Saleeze
Joan Schafer
Alan & Sue Sutton - (Sutton Family
Foundation)

GOLD \$500

Paul Berube
Robert & Kathleen Braglia
Tony & Sarah Calabro
Rita & Chuck Childers
Linda & Pat Decker
Bill Ginn
Sandy Keith
Bruce & Cindy Kilroy
Ralph & June Kinney
Ed Landon & Bettine Brusca
Gregg & Jeanne Richmond
Dr. & Mrs. Vinod Sahney
Vince & Patsy Scuzzo
James & Mary Kat Sundahl
Caroll & Gail Toohey
Bill & Peggy Walker
Cindy Williams
Christina & Bryan Zapf

SILVER \$250

Robert & Venus Belger
Myrna Bianco
Rosemary Bussiere
William & Ellen Camp
Joe & Donna Castellano
Irene & Thomas Crowley
Marvin & Carole Daley
Paula Dawson
Bill & Kitt Gamber
Sandra Githens
Ray & Linda Gordon
Robert & Joanne Hayden
Ruth Hicks
Richard & Linda Kahn
Margaret Kasperian
Krin & Peter Krause

Ray & Jane Leather
Steve Ledbetter
Robert MacDonald
Joe & Pat Magennis
Mike & Karen McCreery
Tom & Cindy McCreery
Laurie Miller McNeill
Peggy Muccia
Ron & Julie Noble
Joe & Mary Beth Noto
Norma & John Noyes
Steven & Suzanne O'Regan
Marsha Pender
David & Sharon Phillips
Francis & Beverly Phillips
Mike & Leslie Seibert
Barbara & David Sellis
Larry & Jackie Smith
Jay & Judy Steffan
Bill & Maggie Welch
George & Beverly Widas
Terry Williamson

BRONZE \$125

Alex & Carol Addona
Pat & Sue Marie Allison
Earl & Donna Atkins
Michael & Marilyn Baran
Jane & Bill Batchelder
Parnie Battin
Lynne D Becker
Mike & Barbara Bene
Earl & Janet Binns
Herm & Diane Bokelman
Arnold & Sheila Breidenbaugh
JoAnn Britton
Gordon Brown
John & Susan Brown
Fred Campbell
Patricia Campbell
Betty J. Carpentier
Larry & Carol Carswell
Pamela & Douglas Chase
Roy & Dee Clark
George & Sue Corsilia
Terry & Amy Coughlin
Dulane & Joy Coval
Donald & Jo Crumpacker
Patrice & Raymond DeMoss
Arthur & JoAnn Desolis
Julia & Geoffrey Dobson
Peter & Peg Donoghue
Brenda Eckard
Shirley Ellis
Sue & Drew Ermelin
Herman & Judith Feldhusen
Diane Frost
Al & Peg Gatto
Bill & Janna Gaughan
Dan & Maureen Geary
David & Janet Gill
Lawrence & Virginia Glacken
Norman & Jennifer Gosse
Bill & Marcia Grove
John & Virginia Hardenbergh
Sharon Heaton
Richard & Joan Henkle

Pat Hurley & Beverly Tschuor
Neil & Lin Johnson
Dianne & Stewart Jones
Floyd & Mary Juday
Pam & Peter Kellenberger
George & Lorraine Kernaghan
Francis Lapinski & Elaine Lapinski
Smith
Towner & Marjorie Lapp
Tom & Jan Lee
Diane Lindberg
Jim & Betty Linke
Ed & Marlene Lipman
Marcia Major
Denise & Randy Malone
Michael & Kathy Mason
Robert & Janice McClanaghan
Philip McClung & Jean Pressley
Ruth Mendelson
Frances Mogelnicki
Tony & Carol Mollish
Jim & Kathy Monahan
Tom & Geri Moore
Sandra Morison
John & Lorraine Naughton
Patricia Opie
Diane Paxman
Claire Peterlin/William Shannon
Michael & Jeanne Pinter
Pat & Jack Richards
Joe & Kathy Romary
Ruth & Jim Ruud
Edmund & Whitney Sale
John & Susan Sawulski
John & Gale Schemm
Lou & Pattiann Sharp
Don Sexton & Stephanie Simpson
Jane Smith & Jim Henry
Kristine & Don Sperry
Reid & Doris Stoner
Lynn & Sandy Stuhldreher
Barbara Swartz
Jack & Judy Thuer
Lisa & Bill Walbridge
Frank & Toni Walls
Andrea & Gerard Walsh
Harold & Carol Wilson
James & Catherine Winchester
Jon & Joan Wioskowski
Dan & Barbara Witmer
Rita Yannoti
Linda Zambaldi
Hank & Marcia Zawada
Wendy Ziccarelli
Tom & Bev Zwetschke