

Rotary
Club of Punta Gorda



**2023-2024
ANNUAL REPORT**

**Punta Gorda Rotary
Charity and Education
Foundation, Inc.**

**A 501(C)3 NON PROFIT
ORGANIZATION**

Mission

Rotary
Club of Punta Gorda FL



Providing for charitable, religious, educational, and scientific purposes that promote or support the goals and ideals of the Rotary Club of Punta Gorda and Rotary International.

This is YOUR Foundation!

2023-2024 Board of Trustees

➤ 7 Elected Members*

- President Darcy Hanley
- V President Charles Marsee
- Treasurer James Williams
Lachlan Smith
- Secretary Doug Morey

- Paul Lioon
- Paul Blaine

▶ 3 Standing Members**

- Club President – Peter Wilkins
- Club Pres. Elect – James Williams
- Club Service – Nancy Johnson

Rotary



Club of Punta Gorda FL

Established as an Endowment

Designed to
Serve...*in Perpetuity!*



History - We received
over \$300K in seed
money in 2010
donated by the Port
Charlotte Rotary
Club



Planned, consistent
asset withdrawals to
meet current needs
here, in our nation,
and abroad, while
seeking to slowly
build our
Foundation's
principal to meet
future needs!

Spending/Investment Policy

Investing our Principal (\$509,893+ currently) in a managed portfolio, which has seen significant gains in the last year.

Investment Policy: 50-70% in equities, 30-50% in fixed income



Annual Budget for charitable spending:

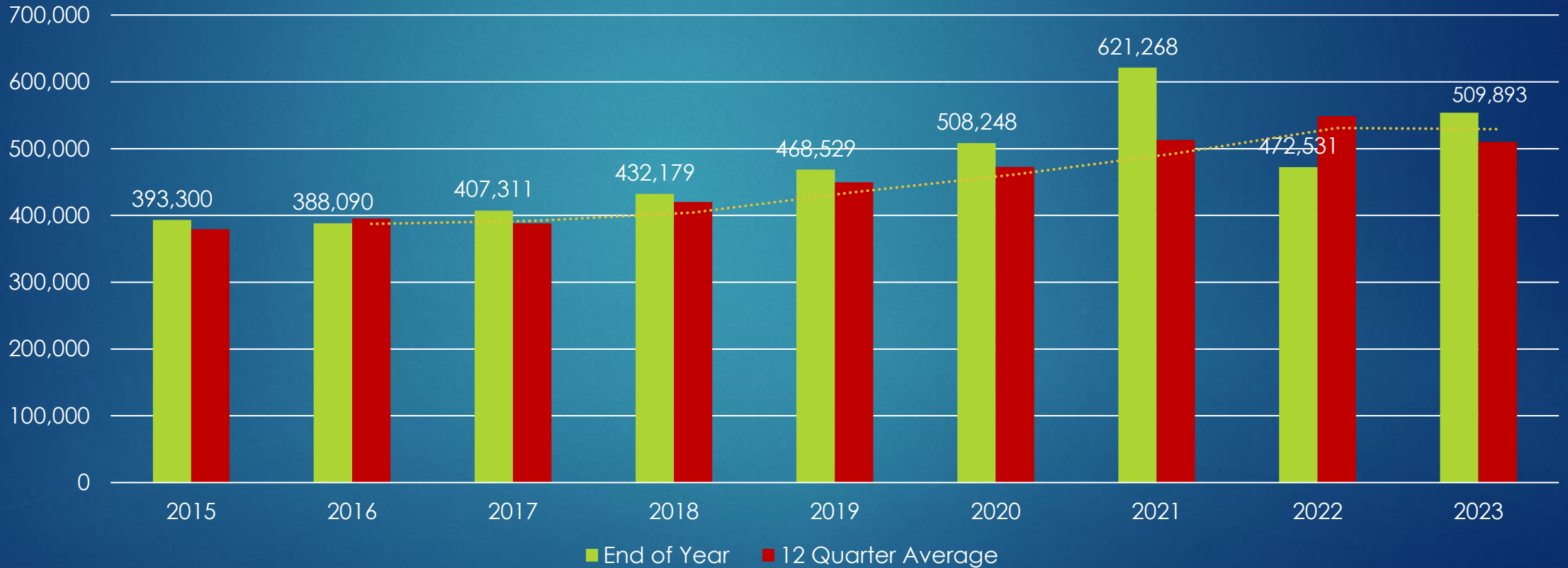
4% of principal, based on 12-quarter rolling average; plus

90% of the previous year's fundraising

The remaining 10% of the past year's fundraising is added to the Foundation's administrative costs

PG Rotary Foundation

Investment Principal – Year End vs 12-Quarter Rolling Average





FY '23 Budget (7/23-6/24)



4% of Assets -----
-- \$20,396



90% of Fundraising -----
-- 25,335



50% of 2022 Giving Challenge
--



Gifts & Carryover from 2022 --
-- 18,509



Available for Grants -----
- \$ 64,240



FY '23 Grant Budget

July 1, 2023—June 30, 2024

▶ Community Service -----	\$15,739	\$14,520
▶ Youth Programs -----	31,542	20,900
▶ International Programs -----	9,636	9,636
▶ Vocational Programs -----	3,019	0
▶ The Rotary Foundation -----	1,285	1,000
▶ Emergency/Contingency --	<u>3,019</u>	<u>1,500</u>
▶ Total	Budget: \$64,240	Spent: \$33,870



Community Service Grants YTD

▶ Heal our Harbor	\$3,000	TEAM Golf Scramble	\$ 200
▶ Charlotte Environmental Center	\$1,500	Safety Posters – HELP	\$2835
▶ PSAN Sponsor	\$1,200	PGGC Butterfly Garden	\$1,000
▶ Charlotte Harbor School Freezer	\$885	Overdose Awareness 5k.	\$1,000
▶ Pedal and Play	\$ 200	TEAM Organic Garden	\$1,000
▶ Peace River Wildlife Center	\$2,000	Military Heritage Museum	\$2,000
▶ Peace River Botanical Gardens	\$2,000	Honor Flight	\$1,000
▶ Inclusive Adventures	\$500	Thanksgiving Turkeys	\$130
▶ Punta Gorda Historical Society	\$1,000	Valerie's House	\$1,000
▶ Paint Your Heart Out	\$5,000	Samaritan's Purse	\$2,000



Youth Service Grants YTD

▶ Youth Service Committee (RYLA, S4TL, Youth Exchange, Scholarships, Interact)			\$13,700
▶ PG Historical Society	\$2,000	Learn To Sail Camp	\$500
▶ PG Fire Dept Ed Materials	\$300	YMCA of SWFL	\$2000
▶ Crossroads Youth Academy	\$4,000	Peace River Wildlife Youth Ed	\$1000
▶ Charlotte Co Art Guild	\$1,000	Botanical Garden Youth Ed	\$1000
▶ Gulf Eagle Div. USN Sea Cadets	\$1,000	Charlotte County Art Guild	\$1,009
▶ CHS Troupe 0922	\$100	Public Safety Youth Academy	\$500
▶ Project Graduation	\$500	Hogan la Esperanza	\$500
▶ CHEC Winter Camp	\$1,000	Feed the Fish	\$1,000
▶ CHS Leo Lions & NJROTC	\$750	CARE-Human Trafficking Forum	\$500
▶ PG Youth Symphony	\$500		

Rotary



Club of Punta Gorda FL

International Service Grants YTD

▶ Shelter Box	\$5,000
▶ Water 4 Life Mozambique	\$6,900
▶ Ukranian Relief Babcock Ranch	\$500
▶ Healthcare in Haiti w/Palmetto Club	\$5,000



Rotary Foundation

Polio Plus	\$1,000
Deceased spouse honoraria	\$100
Deceased member honoraria	\$250

Rotary



Club of Punta Gorda FL

Emergency Relief Grants

Rotary Club of Lakewood

\$500

Rotary Club of Lahania

\$1,000

Administrative Costs:

Storage Locker

\$1641

PO Box

124

Isles YC (100th)

400

DACDB

605

Dept. of Consumer Affairs

186

Rotary

Club of Punta Gorda FL



How You Help !



Fund Raisers

Taste of PG
Healing Field of Honor
The Giving Challenge
Special Events



Gifts from Members and Others



Estate Provisions



April 26, 2025

6PM @ Isles Yacht Club



Thank you!

**On behalf of your Punta Gorda Rotary Charity and Education
Foundation Board, thank you all for a great year!**