



# **2009 Annual Report**

Committed to serving our greater community, thereby enhancing) the quality of life for the Dunta de Mita region

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# **Dear Supporters and Friends,**

The primary objective of the Punta de Mita Foundation, is to make Punta de Mita a better place for all who spend time here, be it the short-term visitor, the winter snowbird, or those who live here year round. We want it to look good, to offer amenities that we can enjoy with our family and friends, while at the same time bettering the lives of those who live in El Coral and Emiliano Zapata.

To do so the Foundation has been built upon three pillars: Supporting non-profit organizations (NPOs), undertaking projects we feel are needed and worthy, and lobbying the municipal and state governments for infrastructure development in the region.

NPOs we have been are supporting, are, of course, PEACE, but others such as the Children's Shelter of Hope Foundation and Riviera Recicla. We want to make it easier for these important groups by providing funding so they can spend more time doing what they do best - helping in the communities.

Projects we have undertaken are the construction of badly needed classrooms, improving school bathroom systems, but probably are most ambitious is "Proyecto Integral", which involves providing a parking lot for tourists, a town plaza for all, a pathway from the plaza to the avenue for easy access, an improved Anclote Avenue in front of the restaurants and recapturing the sand for the beach in front. These five projects together can help not only make the town look better, but provide economic opportunities for all in the towns.

And lastly, if we don't ask the municipality and the state governments, if we don't come to them with projects in which we can help and participate as well, then the odds are that we may just not receive it. Over the past two years we have built strong relationships with both the mayor's and governor's offices, to get projects done such as paving Anclote Avenue, lined with palms, as just one example. But there is much more that can be accomplished, but only through continuing dialogue.

To do this and more we need your support and any form of support is welcome. We have a board of seven who have dedicated many hours to projects planning, meetings and fund raising. But that's not enough. We need your support with donations and by volunteering. Its really a win/win situation - the better our community does, the better off all-round we all will be.

Please contact any of the board, or our director, Paloma Auerbach, for more information on how you can participate in making Punta de Mita a better place to live.

Sincerely,

John Youden and Greg Stanton Co-chairmen - Punta de Mita Foundation



# LETTER FROM THE BOARD

2009 has been a challenging year however results speak for themselves and allow us to show how important your participation and support has been.

During the first quarter of the year, the Punta de Mita Foundation, defined its strategic priorities for 2009 according to the challenges that were brought to our attention by the Smart Growth Report. The report outlined the primary issues and challenges that the communities of Nuevo Corral del Risco and Emiliano Zapata are facing and some of the potential solutions. With a vision of achieving sustainable development in the area, where our actions can reduce social imbalances and the unequal relationship between rich and poor sectors, the Foundation focused its time and resources to fund projects under these four main streams:

Employment and economic development Education Health Garbage Pick-up and recycling and environmental education

In the following pages you will find a detail explanation of the type of work done in each area. Some of them are projects that we developed ourselves, others are programs from local NPOs that we support, not only with funding but also with oversight of the implementation to ensure good accountability and adequate stewardship of the resources.

In addition to our major programs, we are very pleased to share that The Punta de Mita Foundation, thanks to the pro-bono work of David Connell & Associates, was granted the right to issue tax-deductible receipts for Mexicans or Mexican corporations. This is not something that is easy to obtain, often taking multiple tries over a period of a few years. David and his team managed to get this on our behalf in less than a year.

Meet our Board Members:

Greg Stanton John Youden Ymell Villegas, Ricardo Trueba Juan Carlos Yamin Juan Pablo Stone Paloma Auerbach



# **EMPLOYMENT AND ECONOMIC DEVELOPMENT**

### **PROJECT: PROYECTO INTEGRAL**

#### Description

Emiliano Zapata and Nuevo Corral del Risco are two towns that have become trapped between development and marginalization. The primary employer has been the construction industry, however the downturn that has faced over the last year has impacted the local economy. Wages are quite low with 50% of the heads of the household earning less than \$5,000 pesos per month. The second option to improve the local economy is tourism, especially considering the location and proximity to fishing, diving, snorkeling, whale-watching, surfing, etc, but they have lost much of their appeal because of a lack of physiognomy and identity.

The loss of beaches as well as a growing number of migrant workers has created "dormitory" towns for construction projects. Many problems arise because of the lack of permanent and well-paid employment. As a result, what is seen is the combination of negative environmental impacts with the social and economic issues. It is necessary to consider the provision of infrastructure, both social and educational, recreational and health, as a basic theme in the planning of development. Without accounting for such a balance in urban planning, the environmental, social and economic aspects of our quality of life will deteriorate.

To tackle this problem from its roots, the Foundation has been working on a plan of improvement that will better the local region and its economy. The **"Proyecto Integral"** involves five components: **Parking, Plaza, Pathway, Paseo to Avenida Anclote** and **Playa** (the beach). All are important and integral components to help the community and make it a better-looking and better place to live. The primary problem is coordination and oversight, huge task that the Foundation has undertaken to move this project forward. Each component involves multiple players and often one cannot move forward until the other has finished their responsibilities. Here is the update:

**Parking**: The parking lot is now in place but needs improvement. The Foundation has met with the Municipality to ensure funds are allocated for its improvement.

**Plaza**: Located just below it, across the street towards the beach, is an empty lot, which will become a small plaza. A pathway will lead down from the plaza to Anclote Avenue. And then the avenue will be extended to go out on the marina jetty, creating a malecón.

The Foundation has been following up with Municipality, DINE and the owner of the land where the plaza will be constructed. The project was presented to all the actors involved, providing a presentation with Arquitect Jaime Barba, who drafted up maps, pictures and sketches of the project. Everyone has embraced the project and the government has given green light. Once the owners of the land finish the pending paper work, government will be able to change the use of the land and we will be ready to start construction. Municipality has ensured some budget for the construction; the Foundation will fundraise to match government funds.



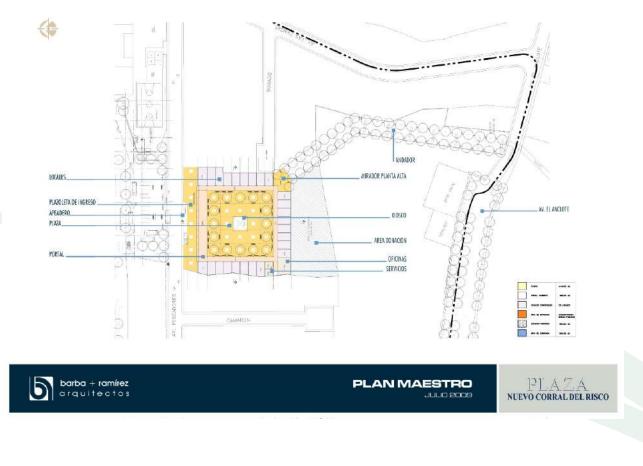
Once the parking and land for the plaza are finalized, a **Pathway** will be available to connect Anclote Avenue. No parking will be available on the avenue, except short-term parking. The plaza would be the main entrance or gateway to the avenue, so there would also be another drop-off point in front of the plaza, across the street from the parking lot. People would walk into a typical Mexican plaza with a bandstand, surrounded by trees, gardens and benches in the shade. At the other end of the plaza, they could take a gardened pathway down to Anclote Avenue, which would come out directly in front of the malecón on the existing jetty.

The Foundation, as well as DINE, are both committed to help make these projects happen. We are moving in the right direction to help increase the attraction of visitors and tourist of the region, at the same time that the community gains identity and recreational spaces.

#### Results

Lobbying the government, owners of land and DINE has been the main achievement. Now the major of Bahia de Banderas as well as the Governor of Nayarit have visited the area, are familiar with the problem and are committed to support and developed it.

Status: In-progress





# **EDUCATION**

# PROJECT: CLASSROOM CONSTRUCTION

#### Description

The Smarth Growth Report showed how education facilities have been lacking for some time, but especially so during the past five years because of the increase in migrant workers who have been bringing their families with them.

There are not enough classrooms to service the youth population. It was found that more than 50% of the community has an education level no higher than the primary level. Many children are forced to leave school because they family cannot afford it and they need them to work.

#### Results

The Foundation obtain founding to provide four new classrooms to two different schools. Two were built at the Kinder Garden of Emiliano Zapata

and benefitted the 90 children that attend. The other two were built on the Primary School of Emiliano Zapata whith a total population of 245 students.

#### Status: Finished

### **PROJECT: SCHOLARSHIPS FOR CHILDREN**

#### Description

In Mexico, there is a considerable difference between private and public schools. The difference is not only in infrastructure but also in the quality of education, teachers and books. Two years ago we started this project for children in the Punta de Mita area who were identified with potential and interest of obtaining a better quality of education.

These children will be given the opportunity to attend a private school in Sayulita, Costa Verde International School. It is a bilingual school focused on teaching art, culture, environmental sustainability where children learn and embrace ecological responsibility as part of their classroom learning. By supporting this project we are giving children an opportunity to be better educated and equipped for their future.

#### **Results:**

Two children enrolled in the project, with excellent grades. Both are attending primary school and have been very well received and integrated with their classmates.

#### Status

On-going with potential to expand.







# NPO SUPPORT: PEACE CASA COMUNIDAD

#### Description

Children go to school only three to four hours a day and only 68% of Mexican children complete nine years of education. Our aim is to increase quality of education as well as academic improvement. PEACE<sup>\*</sup>S Casa Comunidad project offers an after school program that provide children a safe, fun and productive environment in which to spend their afternoons. Children that participate in these programs have decrease a 35% increase in education as well as academic improvement. It provides children and adults with programs and opportunities to develop the necessary skills to be successful, positive contributors to their multicultural environment as well as help the access to better job opportunities where bilingual staff is required.

#### Status

We have funded PEACE "alternative school" in Casa Campesina of Emiliano Zapata for children who are not enrolled in the local schools. Currently sixteen students ranging in age from 9-22 attend the program that gives them a second chance and provides them with the most necessary and basic need, education, which will open doors for their future.

Adult Education 20 students in Emiliano Zapata and 30 students in Corral del Risco are working on completing their elementary or secondary education.

The after school program has a new theme-based curriculum which allows students to learn about a topic in a holistic way. Students will learn about environmental problems and solutions, public and personal health, arts and culture, organic gardening and composting, ecology, cooking and nutrition, journalism, community service, oceanography, domestic and wild animals, and urban beautification. II teachers and 140 students have been benefitted from it, plus 45 students in Emiliano Zapata and 45 in Corral del Risco that are receiving special education services.



# HEALTH

### **NPO SUPPORT: HYGIENE PROGRAM**

#### Description

Public health and social services only reach 33% of the population in the area, it is necessary to invest in building a better health clinic that can care for the size of the population, in the meantime, the Foundation funded a health and hygiene project of **Children's Shelter of Hope Foundation**. This amazing project took place at the five public schools in the area: Corral del Risco (Kinder Garden and Primary School) and Emiliano Zapata (Kinder Garden, Primary and Middle School) and consists of three different components to impact the health and hygienic conditions for children:



- 1) Restrooms remodeling. Renovating and remodeling all restrooms at public schools in the area was a priority. Water pumps, electricity, toilets, sinks and accessories were fixed or restored according to the needs of the schools.
- 2) Maintenance. Providing basic cleaning supplies and staff to keep the facilities clean was the second step. The sustainability of the project relied on cleanliness in the restrooms. Ongoing supplies and support staff dedicated to maintaining the restroom facilities are being provided.
- 3) Education. Parental educational meetings as well were given as were hygiene classes to children, where the importance of establishing routines and maintaining good hygiene practices were highlighted. Signs for bathrooms were done in English and Spanish in order to educate and remind the kids to flush the toilet, wash their hands and not to waste water.

#### Results

The improved health habits as a result of experiencing cleaner restroom spaces and also participation in discussions about improved health and hygiene practices at school and home. A total of 630 children benefitted from the project plus all their families and teachers as indirect beneficiaries.

#### Status

First phase of the program is finished. It included fixing bathrooms and ensure they are working. Parents meetings, maintance of facilties and educational materials are still in progress.

PUNTADEMITA

# RECYCLING AND ENVIRONMENTAL EDUCATION

### NPO SUPPORT: COMMUNIT PRIDE PROGRAM (PEACE)

#### Description

Currently there is a new garbage pick up system working in the two towns. This is administrated and managed by the municipal-contracted company GIRSA. This pilot program has many advantages and disadvantages. The different local non-profits are also involved in trash clean up programs as well as recycling. Recycling has helped remove waste from the town and decrease the volume of trash going to the municipal dump. Keeping the streets clean and preventing waste from entering the riverbeds and ocean are primary environmental concerns of the region, especially if it is to remain a tourist attraction.

#### Results

An environmental educator, who works in the local schools of Emiliano Zapata, Corral del Risco and Higuera Blanca, organized recycling and composting programs within the schools have been developed. The activities include overseeing the trash removal, recycling and composting efforts put into place in the towns of Emiliano Zapata, Corral del Risco and recently started in Higuera Blanca, imparting environmental education classes, supervising high school students who will complete their social service requirement by assisting in the Community Pride programs. The incorporation of these students increase the efficiency and scope of the programs

Status: In progress.

### NPO SUPPORT: RIVIERA RECICLA PROGRAM

#### Description

The Foundation also funded the efforts of **Riviera Recicla**, an organizaiton composed of members of Grupo ProSayulita, PEACE, Entre Amigos, andother concerned local citizens. It was formed to address the current problems in community waste management. This grant helped them combined the efforts of communities from Bucerias to Lo de Marcos, expand the list of materials collected, increase the value of materials to the marketplace and reduce energy use. In addition, there are communities in Valle de Banderas, such as San Vicente that are becoming incorporated into Riviera Recicla.

#### Results

60 tons of plastic were recycled, awareness was raised in eight different communities about the issue including Corral del Risco and Emiliano Zapata.

Status On-going.



# **FUNDRAISING ACTIVITIES**

The Foundation has four main streams to raise funds from private donors (individuals as well as corporations).

#### I. Annual Foundation Fiesta.

Every year during the HOA weeks in mid-March we hold a spring fiesta. The event last year was held at the Four Seasons. They came through by not charging the foundation anything for the event with 100% of proceeds going directly to the Foundation. Not only was it a fun night, it rasied much-needed funds through the ticket sales and raffles. Over 100 residents attended the event and enjoyed delicious food served in different stations. Great setting, great food, live music and wonderful prizes made of this event a huge success!

#### 2. Taste of Punta Mita Event

This is the final event of the Thanksgiving week of festivities in the Punta de Mita region. The event brings together all the different restaurants and activities that exist in the area. 17 local restaurants prepared samples of their cuisine, Mondrian Yacht hosted the bar and prizes were raffled. A fantastic event with 300 people attending from inside and outside the gates of Punta Mita. Hosted by the Four Seasons at the golf course, we were able to enjoy a fun night at the same time raise funds!

#### 3. Annual Golf Tournament

Each year during the Thanksgiving weekend we organized a golf tournament where great sponsors helps us to cover the event costs. The most important donation came from DINE, who donated the use of golf course. 72 golfers participated while supporting a great cause.

#### 4. Friends of the Foundation Program.

Any donor who pledges US \$5,000 or more becomes a Friend and is recognized with a plaque that each year is mounted at the Punta Mita Beach Club, also coupons are given to receive a number of benefits from local businesses in the region. We want to thank our 2009 Friends of the Foundation!

Anne and John Marion Juan Carlos and Carla Yamin Kenneth Hersh Lonna Wais Ronald R. Budacz Steve Dostart and Sharon Meers William and Gail Farquharson Barbara Henri The Precourt Foundation Charles and Valeria Ewell John and Florence Youden Kevin and Mary Grace Burke Peter and Claire Newton Robert and Katherine Penn Tim Koogle and Pam Scott Catherin Schmidt and Robert Karp Robert Colman The Levit Foundation



# **CORPORATE SPONSORS**

A special thank you to our corporate sponsors who, without their commitment and support many of our projects would not have been possible.



Punta Mita, through Dine, the development group of Punta Mita, has been a strong supporter of the Punta de Mita Foundation since day one, and provided the initial seed money to help the Foundation get started. They have pledged \$50,000 USD towards the Foundation for the next five years.



Stone Contractors, with the leadership of Juan Pablo Stone have proven to be invaluable to the Foundation, both with Juan Pablo's participation on the board and with his contribution in helping with the construction of new classrooms and school improvements. Stone Contractors are responsible for building some of the finest homes in the Punta de Mita region.



## FOUR SEASONS RESORT

Punta Mita. México

The Four Seasons has been a very strong supporter of the Foundation, providing invaluable support for a number of our events such as last year's Homecoming in November and the March Fiesta.



Eurowindows and proprietor Etienne Perniaux have assisted the Foundation by providing badly needed windows and doors for the classrooms that the Foundation has constructed. Eurowindows is the leader in the region for PVC windows and doors to many homes and condominium developments.



# TWO GREAT FOUNDATION EVENTS FOR NEXTYEAR

# Please Mark your Calendar!

### Foundation Fiesta.

Our 2010 Foundation Fiesta was held in March at Sky Bar of Hotel Cafes de Artistes. We want to thank Thierry Blouet and his team for hosting our event on such short notice. We were unfortunate to have our initial venue cancelled 15 days prior to the event. This situation had an impact on the quality of our event but we have learned and are sure that for next year we will reposition the Fiesta!

We are very committed to ensure the quality of our events, for not only seeking to raise funds but to provide a wonderful venue with excellent food and drinks that allow people to celebrate, have fun at the same time they are supporting our programs.

Please keep in mind that for the next HOA meetings held in March 2011 we will be hosting a wonderful Gala dinner at one of the resorts in Punta Mita, where you will be able to enjoy an amazing menu, beautiful music and most important, hear of the achievements the Foundation has made.

### **Taste of Punta Mita and Golf Tournament**

These both important events will be held over the 2010 Thanksgiving weekend. We will be sending you details as date comes closer.





# FUNDACION PUNTA DE MITA A.C.

### Balance Sheet As of December 31st, 2009 and December 31st, 2008

#### Figures in Mexican Pesos (MXN)

			<u>Dec 2009</u>		<u>Dec 2008</u>
<u>Assets</u>					
Cash Other current assets Total Current assets	(Note 3)	\$ \$	848,272 \$ 53,049 <b>901,321</b> \$		665,769 9,947 <b>675,716</b>
Total Assets		\$	901,321	\$	675,716
Liabilities					
Accounts Payable Taxes Payable			0 12,629		448 19,777
Total Short term liabilities		\$	12,629	\$	20,225
Total Liabilities		\$	12,629	6	20,225
Patrimony					
2008 patrimony activity 2009 patrimony activity		\$	655,433 \$ 233,259	6	655,433
Total Patrimony		\$	888,692	\$	655,433
Total Liabilities & Patrimony		\$	901,321	s	675,658
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The accompanying notes are an integral part of these financial statements



#### **Activities Statements**

#### From January 1st through December 31st, 2009 and From January 1st through December 31st, 2008

#### Figures in Mexican Pesos

		<u>!</u>	Dec 2009		Dec 2008	
Incomings						
Contribucion ICF Corporations		\$	1,711,977 582,809	\$	1,421,327 0	
PMF Events			232,809		26,371	
Local Individual Donors			210,500		0	
Education Contributions (Becas Vallarta)			102,481		815,309	
Other contibutions			16,349		31,126	
Total Inflows from contributions			2,856,981	100%	2,294,133	100%
Expenses related to programs						
School Construction	(Note 4)	\$	853,124	\$	0	
Education	(Note 4)		608,539		215,381	
Community pride (PEACE)	(Note 4)		601,996		672,884	
Ecology (Riviera Recicla)	(Note 4)		155,470		370,044	
Health (Children Shelter of Hope)	(Note 4)		143,750		0	
Other programs			125,271		9,404	
Campesino Program			0		339,424	
Total expenses related to progr	ams		2,488,150	87%	1,607,137	70%
Foundation operative expenses:			00.055		100.010	
Administrative			90,655		109,319	
Marketing			12,730		14,467	
Total operative exper	nses	\$	103,386	4% \$	123,785	5%
			00.400		(00.000)	
Financing income -net			32,186		(92,222)	
Total Expenses			2,623,722	92%	1,638,700	71%
Patrimony at the end of year		\$	233,259	8% \$	655,433	29%

The accompanying notes are an integral part of these financial statements



### FUNDACION PUNTA DE MITA A.C.

#### **Cash Flow Statement**

## From January 1st through December 31st, 2009 and From January 1st through December 31st, 2008 Figures in Mexican Pesos

	Dec 2009	Dec 2008
Increase on no restricted patrimony	233,259	655,433
Operating Activities		
Increase on vendors	(448)	448
Increase on Taxes payable	(7,147)	19,777
Increase on sundry debtors	-	-
Increase on other current assets	(43,102)	(9,947)
Resources applied by operating activities	(50,697)	10,278
Sum	182,561	665,711
Cash at begining of period	665,711	-
Cash at the end of period	848,272	665,711



### PLEDGE FORM 2010

Please fill out the following form and mail it to the address below along with your donation. NAME\_\_\_\_\_\_

Fiscal A	ddress:
Phone:	E-mail:
	Yes, I would like to become a Friend of the Foundation with a minimum donation of \$5,000
	Yes, I would like to become a Friend of the Foundation with a higher donation of
	I would like to make a donation of

I would like my donation to go to:

- 1) Education
- 2) Health
- 3) Economic development
- 4) Environment

#### USA TAX-DEDUCTIBLE RECEIPT

Please write a check and mail it to International Community Foundation at 2505 N. Av, National City, CA 91950 or for online donation with credit card go to www.icf-xchange.org

#### MEXICAN TAX DEDCUTIBLE RECEIPT

Please write a check to or wire funds to Fundación Punta de Mita, AC Account in Dollars: 09849002101 Banamex SWIFT BNMXMXMM Address: Casa Mita/Fundación Punta de Mita Ramal Carr. Federal 200 Km 19, Punta Mita, Nayarit, Mex. 63734

#### CANADIAN TAX DEDUCTIBLE RECEIPT

Please contact us for detail explanation on how to make your donation

