

# ROTARY CLUB OF SANTA ROSA FOUNDATION

## Annual Report 2015-2016

### Giving Helps Lives

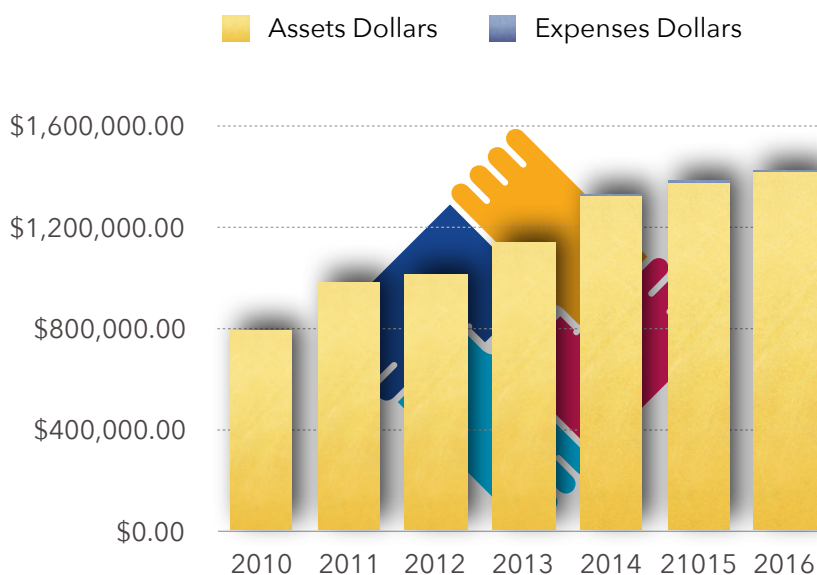
Rotary Club of Santa Rosa Foundation (Foundation) continued on a path of consistent growth during 2015-16. The Board continued supporting its traditional scholarship and community grants programs while keeping expenses to a minimum.

The Foundation was incorporated November 15, 1989 and for 27 years has funded multiple organizations throughout our local community.

### Your Efforts

Meetings are open and held on the 4th Monday of the month at 3:15pm at GHD Engineering in Santa Rosa. The Foundation Handbook is available upon request with information on the history, operation and goals of the Foundation. Questions about the Foundation are welcome.

**Contact:** Jeanne Levin at 707-579-5076 or e-mail [trustattny@sbcglobal.net](mailto:trustattny@sbcglobal.net).



### Reaching Our Goals

**Assets of the Foundation reached \$1,415,501.00 for 2016,** an increase of nearly \$42,000 from the prior year. This increase was made possible because of a combination of \$35,030.00 in contributions plus investment returns of \$69,222.00. This gave us the ability to provide \$46,800 in scholarships and community





## Our Future Depends on Your Help

The Board has a set of continuing goals that were established five years ago and remain relevant today. These goals include:

- Improving the effectiveness of the Foundations donor outreach program
- Developing and implementing an effective marketing plan
- Strengthening the working relationship between the Club and the Foundation
- Increasing the level of contributions from Club members as well as non-club members.

The Board has short term goals aimed at improving the operation of the Foundation. Examples of these goals are updating the Bylaws and Trustee Handbook, review of the investment Policy, develop and implement a marketing plan, enhance communication through the use of technology, and improve tracking system for grant and scholarship recipients.

*Great things happen with your help and contributions.*

grants. The Foundation also supports the Rotary Club's charitable giving programs such as the Giro Bello and Joint Charitable Projects Committee. Another reason for the financial success of the Foundation is ultra-low **annual expenses of 7/10 of one percent** of our assets for 2016! This comes from volunteer help; and generous outreach by local groups including the Rotary Club of Santa Rosa who created the Foundation.

## Community Leadership in the Foundation

The Foundation is governed by a 15 member Board of Trustees, all of whom are active members of the Rotary Club of Santa Rosa. The Foundation operates through all aspects of the organizations work with the following committees.

- Executive
- Investment
- Public Relations & Marketing
- Governance
- Nominating
- Joint Charitable Projects
- Donor Recognition
- Scholarship
- Distribution & Finance

The board is proud of this years Foundation grant recipients being \$10,000 to the YWCA Sonoma County, \$10,000 The Living Room, \$3,000 Women's Recovery Services, and \$1,000 to Friends in Service Here. In addition, the Foundation provided \$18,000 in scholarships to local high school and college students.

*Those who are happiest are those who do the most for others.*

— Booker T. Washington,

