

ROTARY CLUB OF SANTA ROSA FOUNDATION

Annual Report 2016-2017

Giving Helps Lives

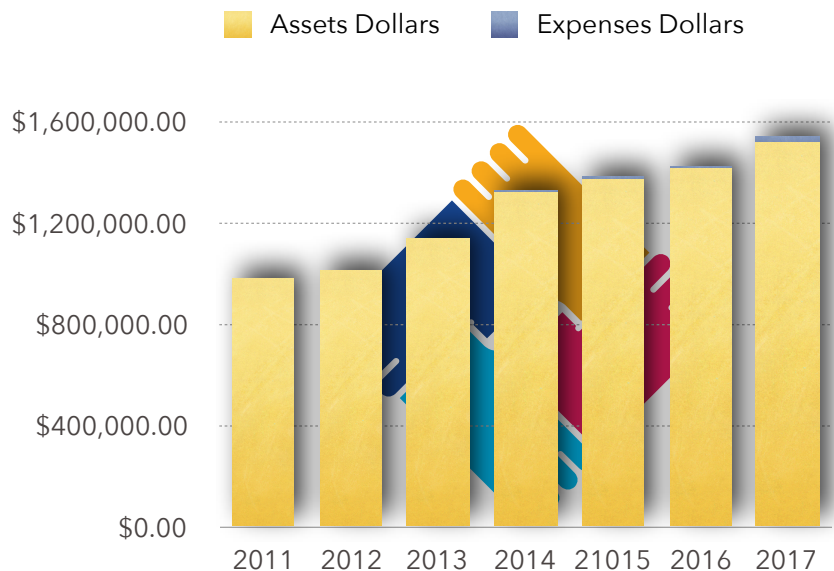
Rotary Club of Santa Rosa Foundation (Foundation) continued on a path of consistent growth during 2016-17. The Board continued supporting its traditional scholarship and community grants programs while keeping expenses to a minimum.

The Foundation was incorporated November 15, 1989 and for 28 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: Judith Glenn at 707-526-6032 or e-mail judithg@sonic.net.



Reaching Our Goals

Assets of the Foundation reached \$1,524,990 for 2017, an increase of over \$109,000 from the prior year. This increase was made possible because of a combination of \$96,150 in contributions plus investment returns of \$82,250. This gave us the ability to provide \$58,700 in scholarships and community grants.





Our Future Depends on Your Help

The Board has a set of continuing goals established five years ago and remain relevant today.

- 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.

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 9/10 of one percent** of our assets for 2017! 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.

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

The board is proud of this years Foundation awarded grant recipients totaling \$38,950 to local non-profit organizations and provided dictionaries to all third graders in Santa Rosa.

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

— Booker T. Washington,

