

FOUNDATION HISTORY

- Founded in 1989 by the Rotary Club of Santa Rosa as a separate IRS 501c3 Non-Profit Foundation to assist with charitable fund raising and giving to the local community.
- Create an endowment fund large enough to fund charitable community service projects.
- Foundation was patterned after those affiliated with the San Francisco and Oakland Rotary Clubs.
- Foundation governed by trustee board who are members of the Rotary Club of Santa Rosa



FOUNDATION PURPOSE



- Accept donations from Rotarians as well as Non-Rotarians
- Prudently invest the funds
- Distribute funds in support of annual Foundation programs as well as joint Club/Foundation Programs & Projects



ANNUAL PROGRAM SUPPORT

Scholarships
Jamison Agriculture Fund
Pluth Dictionary Fund
Druquer Battered & Abused People Fund



SCHOLARSHIPS



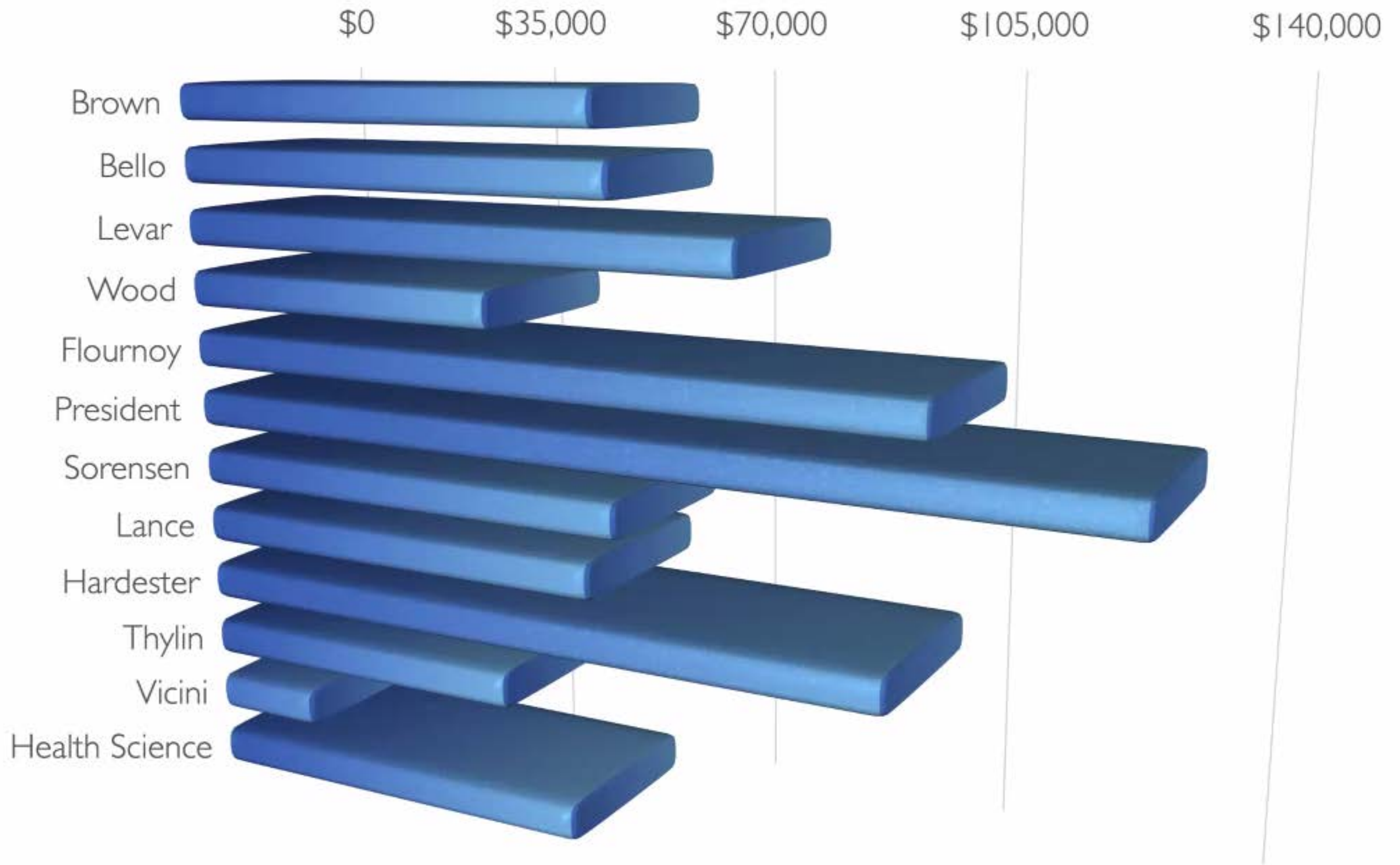
VIRTUAL GRADUATION CELEBRATION

— May 23, 2020 —



Scholarship	\$ Awarded / year	Fund Balance
John Brown Military Veterans	\$2,000	\$64,482
Larry Bello Occupational	\$2,000	\$66,851
Jack Levar Business/Communication	\$4,000	\$86,144
Christopher Wood Entrepreneurism	\$2,000	\$48,717
Flourney Engineering (renewable)	\$2,000	\$107,383
RCSR Foundation President	\$3,000	\$138,453
RCSR Foundation Trustees	\$2,000	see above
Sorensen - Chase Transfer	\$2,000	\$66,501
Vicini Family Health (nursing)	\$2,000	pass through
Lance HS Leadership/Scholarship	\$2,000	\$62,297
Rotary Health Sciences	\$2,000	\$58,936
Vicini Family	\$2,000	Pass Through
Hardester Disabled (renewable)	\$4,000	\$102,454
Miyano	\$2,000	pass through
Total	\$35,000	\$697,213





Fund Balances



JAMISON MERIT AWARD PROGRAM

- Grants are used to purchase a lamb, goat, steer or pig to be raised, shown and sold at the Sonoma County Fair
- FFA Students from Elsie Allen and Santa Rosa High are eligible to receive grants from \$200 to \$250 for lamb, goat, or pig.
- FFA students from all Sonoma County schools may apply for \$1,000 grants for steer projects.
- Grants are based on merit as determined by an application and interview process.



PLUTH DICTIONARY FUND



The Pluth Endowment Fund was established when Genevieve Pluth passed away and left money in her estate to purchase books for Santa Rosa area children. Genevieve was not a Rotarian but through the efforts of a friend and two members of the Rotary Club of Santa Rosa, approximately \$75,000 from her estate was placed in an endowed fund to support her desire to support local school children. The Pluth Fund has grown to over \$100,000 and the annual proceeds are used to purchase and distribute nearly 2,000 dictionaries for Santa Rosa third graders.



DRUQUER FUND FOR ABUSED PEOPLE



The Druquer Endowment Fund for the benefit of “Battered and Abused People” was established by the Rotary Club of Santa Rosa Foundation in 1995 with the passing of Catherine Druquer and the designation in her estate plan to help battered and abused people. Catherine was not a member of Rotary but was friends with Rotarian George Thebolt. George informed Catherine about the Rotary Foundation and its mission of supporting local non-profits with special projects. The Druquer Fund started with the initial contribution of \$53,000 and has grown to over \$97,000.



JOINT CHARITABLE PROJECTS

The Foundation and the Club have jointly funded dozens of local projects. Recent ones include :

- The Living Room
- Book Mobile
- Ceres Project
- Lime Foundation
- Salvation Army
- YMCA
- Tool Library



GIRO BELLO

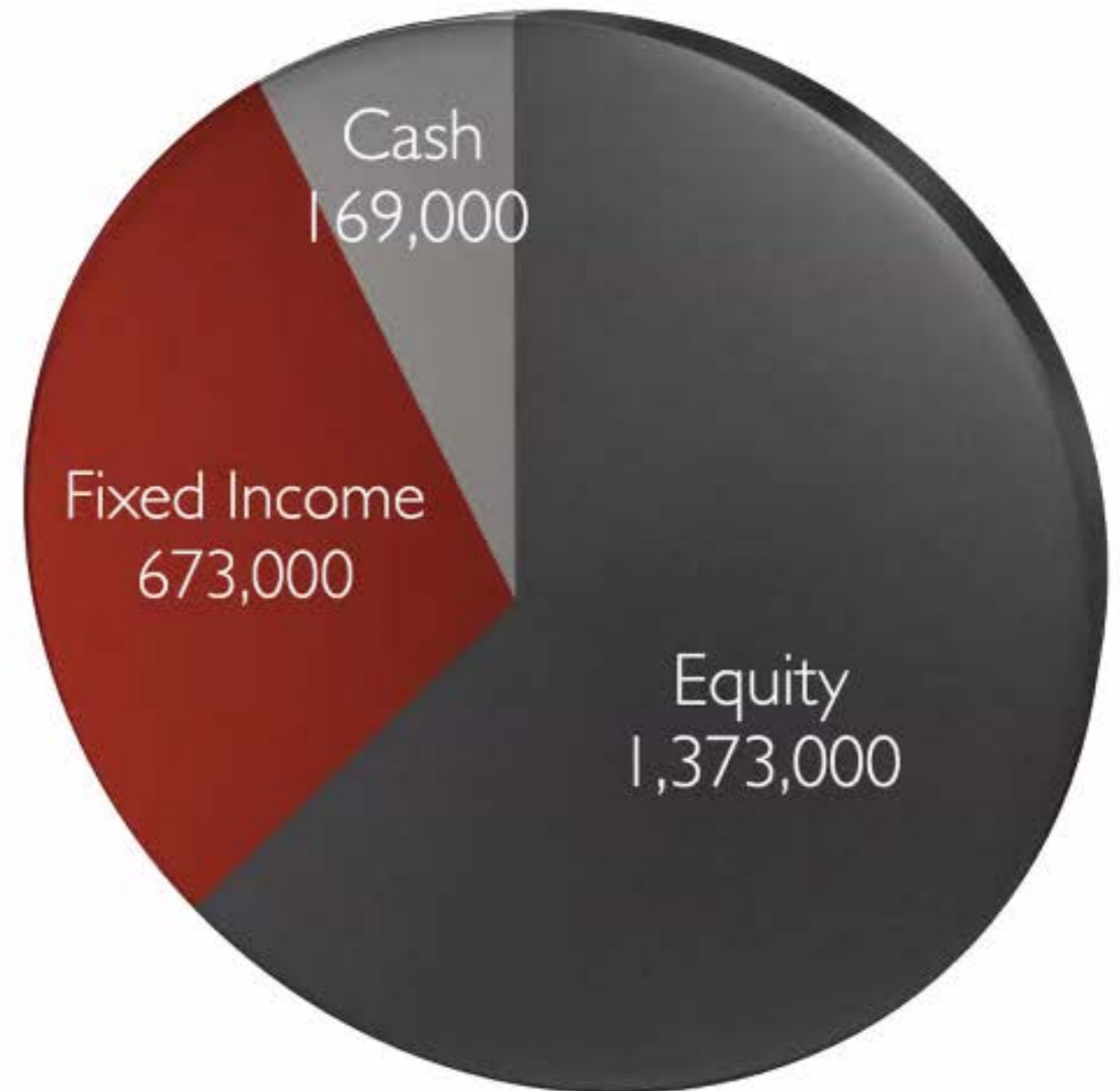
Foundation accepts tax deductible sponsorships which are later made available to the Club for local community service projects.



INVESTMENTS

Asset Allocation

Cash	7.62%
Fixed Income	30.39%
Equity	61.99%
Total Market Value \$ 2,227,000	



SUPPORTING THE FOUNDATION WITH GIFTS OF CASH

- Undesignated Cash Gifts
 - Gifts of any amount helps
 - Build the Foundation's General Fund
 - Support scholarships
 - Support the Joint Charitable Projects of the Club



SUPPORTING THE FOUNDATION WITH GIFTS OF CASH

- Designated Cash Gifts to existing Funds
 - Legends Fund for Memorial Gifts
 - Specific Scholarship Fund
 - John Brown Veterans Fund
 - Jack Levar Business/Communication Fund
 - Example -Jamison Fund supporting high school FFA student with their livestock projects



YOUR SUPPORT

Create a Designated Fund

- Support a cause important to you
- Create a legacy for you or loved one
- Becomes active when minimum is reached
 - any amount to begin
 - \$25,000 minimum to be active
 - achieve minimum within 5 years



SUPPORTING THE FOUNDATION WITH **NON**-CASH GIFTS

- Beneficiary for insurance as Jeanne Levin did
- IRA beneficiary or Qualified Charitable Distribution for stocks, bonds, other investments
- Real estate
- Beneficiary in your estate (will or trust)
 - There may be tax benefits
 - See your CPA

If you need advice on any gift feel free to chat with me or any of our staff who has volunteered to help!



YOUR BOARD

- Ryan Thomas
- Sam McMillan
- Bill Rousseau
- Bill Hatcher
- Vickie Hardcastle
- Steve Olson
- Pete Lescure
- Nona Lucas
- Chuck Wear
- Cecil Humes
- Kris Anderson
- Paul Hamilton
- Doug Chase
- Ann Gospe
- Cathy Vicini

