



ROTARY CLUB OF SARASOTA BAY  
**FOUNDATION**



Rotary Club of Sarasota Bay – April 25, 2023



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# ROTARY CLUB OF SARASOTA BAY & RCSB FOUNDATION 101

## What's the same?

- Membership
- Overall Goals
- We work collaboratively to achieve community and global goals



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## WHAT'S DIFFERENT?

We are separate legal entities. The RCSB Foundation is incorporated as a tax exempt non-profit – a 501(c)(3).

The RCSB Foundation financial records are subject to IRS review with more scrutiny; we file 990 and apply for License to Solicit each year. Contributions to the RCSB FOUNDATION are tax deductible.

The board of the RCSB Foundation has different members than the Club but all Foundation board are members of the RCSB and the Club President, Past President and President Elect are ex-officio on the Foundation board. The Foundation board is fiscally responsible for the Foundation's funds. Quiz

# RCSB Foundation Board Members 2022-23

President	Stacy Ridenour	President
Secretary	Terry Brackett	Secretary
Treasurer	Mike Pender	Treasurer

## **2022-24**

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Board #1	Ann Krause	Ex-Officio as club PE
Board #2	Brian Maddox	Ex-Officio as club P
Board #3	John Mousseau	
Board #4		

## **2021-23**

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Board #1	Janalee Heinemann	Ex-Officio as Club IPP
Board #2	Carol Mitchell	
Board #3	Larry Wickless	
Board #4	Leslie Glass	



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RCSB Foundation – is our Club's Foundation supporting our club's projects

The Rotary Foundation (TRF) – Rotary International's Foundation – they award Paul Harris awards for each \$1000



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# WHEN DID THE RCSB FOUNDATION START?

Incorporated July 23, 1985

Mike Pender – first president and still remains treasurer/CPA

Member John Berteau, Williams Parker did the legal work to set it up.



How much does the Foundation  
have in our Fund to award?

Current balance: \$395,000

Spending Policy – 4% 3 yr rolling  
average

Generally about \$15K a year that is  
leveraged to \$30-\$100,000



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# How were the funds raised –

- Founders
- Fundraisers
- Giving Challenge
- A few generous members



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What has been accomplished:

Changed throughout times as Club interest have change and community needs.



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# 1990's highlights...

YMCA – Swimming Pool

Disaster – Hurricane Andrew

Children's Haven

Playground in Newtown



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2000's

- Bike Helmut
- Easter Seals Wheelchair Ramps
- Centennial Project – Oak Park School playground for children with disabilities
- Shelter Box
- Katrina relief



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2010's

Green Path Farming –  
Veterans for Common Sense at Easter  
Seals property

Collaborative – Refer(igerator) Truck for  
All Faith's Food Bank with Sarasota Club  
and others

Cambodia – projects with Bill Monroe and the  
Rotary Club of Phnom Penh – MEC, Books, Food,  
Bikes  
Ongoing to present as needs change



# 2015-2017 Changes:

Applications no longer on our website – must be submitted and sponsored by a Club member

New emphasis on Club initiated projects/program

Funds moved from bank trust department to Gulf Coast Community Foundation for investment.

Checking remains at Centennial Bank



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Grant Applications - Generally \$1-5K

Available from any RCSB Foundation Board member

501©3 Determination Letter

One page budget

## GRANT APPLICATION FORM

PLEASE SUBMIT TO RCSB FOUNDATION AT [RIDENOURSTACY@GMAIL.com](mailto:RIDENOURSTACY@GMAIL.com)

ON OR BEFORE OCTOBER 30 or MAY 4.

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Org. Website: \_\_\_\_\_

Phone: \_\_\_\_\_ Sponsoring RCSB Rotarian: \_\_\_\_\_

Amount Requested: \_\_\_\_\_ Date Funds Are Required: \_\_\_\_\_

Purpose or Mission of the requesting organization:

Describe in brief the project for which funds are needed. Please include suggestions on ways to involve Club Members in the activity and/or have members from the receiving organizational report back to the Club.



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Club initiated projects –

IB E2 Program at Riverview/Last Mile – after 2 years of interviewing in the community, Larry Wickless/Lew Solomon focused on this project for which we were the founding donors.

Counseling for first generation college bound students in Riverview IB

Last mile funding – for needs like airplane tickets, computer, clothing for cold weather, bicycle.



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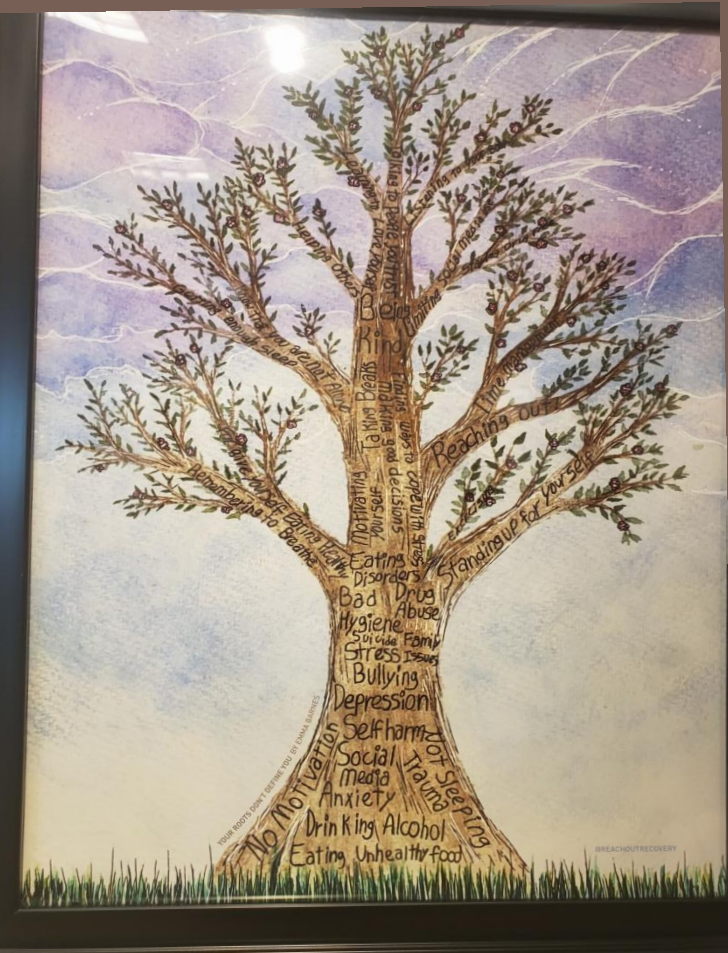
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# Teen Mental Health Project-

\$9,000 in scholarship/awards  
Awards ceremony



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# Heritage Harbour Playground Microforest

A high-performance Microforest for Environment and Education

The Heritage Harbour Master Association and SURF (Suncoast Urban Reforesters) are pleased to announce that a half-acre native forest will be planted next to the playground at Heritage Harbour Park. The forest will be planned and planted to grow fast and provide immediate and extraordinary environmental benefits. The forest will also include educational trails for kids of all ages to learn about nature.

## Calling all Volunteers!!

Wed Nov 9<sup>th</sup> at 9 am: Bed Preparation

Sheet cardboard and woodchip mulching



Please join the Microforest Planners, Florida Veterans for Common Sense, Master Gardeners, Ringling Students, Rotarians and local volunteers to prepare the planting bed by layering sheet-mulch cardboard over turf and raking stockpiled wood-chips to form a thick fertile bed.

Save the date **Wednesday December 7<sup>th</sup>** at 9 am for planting day. We'll install more than 2000 plants of 70 species into an educational microforest.



Microforests  
– Starting  
with Celery  
Fields and  
now on #4



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# DISTRICT PROJECTS – LIKE DISASTER TRAILERS



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Some grants are just that – one time grants of \$1,000 - \$5000

Club initiated projects and some others ARE ALL Leveraged – HOW?

- Supported by OUR Club
- Other Clubs
- By member(s)
- MATCHED by District
- MATCHED By RI

TO LEVERAGE MUCH BIGGER GRANT/IMPACT - \$30,000-100,000 PER YEAR!



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# GUIDING PRINCIPLES RCSB FOUNDATION



- To respond with financial support in the form of grants or scholarships to programs proposed and supported by RCSB Club members, whose interests should reflect the ever-changing needs in our community, district and world.
- To administer grants in a fiscally responsible way that both maximizes the good we can do in our community & world, while continuing to grow the corpus of the fund.
  - 1)An example is having a multi-year project or one that is approved a year in advance that enables us to apply for district funds or collaborating with other clubs.
  - 2)In general the foundation should not support the same project indefinitely.
- To encourage club members to donate to the RCSB Foundation each year (even on non-Giving Challenge years), to support foundation fundraising projects, and to encourage bequests to the RCSB Foundation.
- To review the performance of our investment managers.

Please consider how you can help build and grow our Foundation, enhancing what we can achieve now and in the future.

- Add a gift to Dues
- One time gift – tax deductible payable to the Rotary Club of Sarasota Bay Foundation
- Direct part of your Required Minimum Distribution from you IRA to the RCSB Foundation – save on taxes and maximizing your gift.
- Name the RCSB Foundation as a (partial) beneficiary of an IRA or Life Insurance Policy or included in your will.

Questions?

Always consult your tax and/or financial advisor



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