

2016-17 Foundation Goals:

Funds expended:

1. Write letters and ensure-delivery of \$35,032 to 13 clubs in District Grant funds (In process). Support DG Marge in plans for outreach to Cuba.
2. Increase Global Grant “match” to better reflect recent giving. (done)
3. Communicate GGs to the clubs with the goal for clubs to better understand the process and commitment required and to increase up to six GGs sponsored by clubs in our District this Rotary year.
4. Better represent position as PolioPlus Chair Mike’s home District by pre-paying Polio Plus DDF at beginning of year (done).

Annual Giving (Peter):

1. Increase Paul Harris Society members to 50 (by additional PHSEs and converting from “eligible” to actual).
2. Increase Rotary Direct members to 170 (from 50).
3. Speak to clubs as appropriate.
4. Reach/maintain 100% club participation in Annual Giving.

Polio Plus (Lawrence)

1. Give Polio Plus talk to the 27 clubs that have not yet heard it.
2. Focus on large clubs with a lot of resources that have **not** been generous PP contributors in the past.
3. Reach 100% club participation in PP giving.
4. Increase the overall PP giving level from last year.
5. Encourage and facilitate the Polio Plus activities around the District in October.

Endowment and Major Gifts (Ann Lee):

1. Hold a successful 100 for 100 Centennial Celebration event on November 10.
2. With a team of trained Ambassadors, further the education of club members to the opportunities for planned giving offered by TRF. This will include speaking at clubs

(myself as well as others) when invited as well as working one on one with individuals. Getting the word out is crucial, education can lead to gifts.

3. Working with select members of our trained Ambassadors, continue to identify and build relationships with members of our district securing additional major gifts/ planned gifts beyond the Centennial Celebration.
4. Primary focus for 100 for 100 3 year campaign will be on Portland and Portsmouth clubs but not total focus.
5. Explore possible non-Rotarian major gifts.

Communication (Marty):

1. Continue to write thank you notes to individuals and clubs that excel in giving. Continue to write twice-annual notes to Foundation Chairs to update them on their club's giving.
2. Speak at the 18 clubs that I have not yet reached about giving and TRF.
3. Write monthly articles for the District newsletter and other venues as appropriate.

Process improvements:

1. Work to develop sub-committees - not standalone subcommittee chairs - as appropriate for Foundation activities. Note: This is a multi-year goal.
2. Finalize the Document Retention Policy (In process).
3. Develop methodologies to keep the Foundation microsite more accurately updated.
4. Create a "cloud" to maintain District Grant and Qualification data.
5. Update on-line LMS with new information in time for next year's District Grant season.