



District Three Foundation Strategic Plan 2021-2024



Vision: Altrusa is a leader among international organizations improving communities worldwide through a network of member clubs.

Mission: The mission of the Altrusa District Three Foundation is to responsibly invest, manage and distribute funds to further community service programs and projects with other charitable, educational, literary, and scientific purposes of District Three, Altrusa International, Inc. and its Altrusa Clubs.

Educate Altrusans and others on the purpose of the Foundation and show the benefits of participation, both as a donor and as a club.

Responsibly and effectively manage the District Three Foundation

Encourage contributions by Altrusa Clubs, individual Altrusans and the community at large to the Foundation's restricted and unrestricted funds.

Market the Foundation and seek funds

Educate the membership on the benefits of participating in the District Three Foundation

- Ensure the Foundation is operating in the most efficient and up-to-date manner.
- Ensure the Foundation is in compliance with all regulations for a non-profit organization
- Ensure the Foundation is meeting the needs of the District Three Altrusans.
- Invest funds for maximum returns

- Return increased financial interest to the Clubs for their projects.
- Increase the temporary restricted District Three Grant Fund balance to a minimum of \$50, 000.

Increase the Principal through investment and income to the Permanently Restricted, the Grant Fund, General Fund, and Joey Robinson Scholarship Fund.

GOAL 1: EDUCATION – Educate Altrusans and others on the purpose of the Foundation and show the benefits of participation, both as a donor and as a club

| Strategies | Action Plan | Responsible | Timeline |
|--|---|------------------|----------|
| Educate the membership on the benefits of participating in the District Three Foundation | <p>To utilize the DSB and a workshop at the annual Conference to communicate and educate District Three Altrusans about the services offered by the Foundation</p> <p>To encourage clubs to use the Foundation’s tax-exempt status for their fundraising events</p> <p>Report to the Altrusa District Three Foundation membership annually during the District Conference</p> | Foundation Board | Ongoing |

GOAL 2: FISCAL RESPONSIBILITY – Responsibly and effectively manage the District Three Foundation

| Strategies | Action Plan | Responsible | Timeline |
|---|--|------------------|------------------------|
| Invest funds for maximum return. | Review the performance of investments and prepare a semi- annual report for the Trustees. | Treasurer | Semi-Annually |
| Ensure the Foundation is operating in the most efficient and up-to-date manner. | Review policies and bylaws as needs/situations change. Evaluate and adjust the Strategic Plan | Foundation Board | Annually |
| Ensure the Foundation is in compliance with all regulations for non-profit organizations. | <p>Review the procedures for receipt of club project funds.</p> <p>Review documents needing to be filed for government compliance</p> | Treasurer | Mid-year Board meeting |
| Ensure the Foundation is meeting the needs of District Three Altrusans. | <p>Meet at least once annually for a face-to-face meeting and hold additional meetings as needed, either face-to-face or electronically.</p> <p>Arrange for an annual review of the accounting records and submit an annual report to the delegate body at the Conference.</p> | Foundation Board | Annually |

GOAL 3: FUND RAISING – Encourage contributions by Altrusa Clubs, individual Altrusans and the community at large to the Foundation’s restricted and unrestricted funds.

| Strategies | Action Plan | Responsible | Timeline |
|---|--|--------------------|-----------------|
| Increase the temporarily restrict District Three Grant Fund Balance to minimum of \$50, 000. | Conduct fundraising activities at the annual District Conference | Foundation Board | Annually |
| Return increased financial interest to the Clubs for their projects. | Conduct fundraising activities at the annual District Conference | Foundation Chair | Annually |
| Increase the restricted fund balance to provide more and larger grants to Clubs for their projects. | Include in the Governor’s calendar reminders of all items relevant to the Foundation including an annual donation in January or year-end donation. | Foundation Board | Annually |

GOAL 4: MARKETING – Market the Foundation and seek funds.

| Strategies | Action Plan | Responsible | Timeline |
|--|--|--------------------|-----------------|
| Increase the Principal through investment and income to the Permanently Restricted, the Grant Fund and General Fund. Increase the balance on the Joey Robinson Scholarship Fund through donations received. | Invest funds for maximum returns and minimum risk. | Foundation Board | Ongoing |