



ROTARY CLUB OF APPLETON GUSTO

Service Above Self

November 22nd, 2016 **Upcoming Programs**

November 29th, 2016 **FOX BANQUETS**

Ethics in Business Panel
Thought of the Day: Gail Popp

December 6th, 2016 **NO MEETING**

Officers 2016-2017

President

Jennifer Stephany

President-Elect

Chad Hershner

Past President

B. S. Sridhar

Secretary

Gary Hermsen

Treasurer

Nancy Leipzig

Directors

Sonia Barham
Andrew Micheletti
Jake Woodford
John Nygaard
Mary Downs
Jenni Eickelberg
Andrew Dane
Amy Flanders

Sergeant-At-Arms

Dan Flannery

Rotarian of the Year

Nancy Leipzig
Tom Boldt

Admin. Assistant

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Membership – 146

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APPLETON ROTARY FOUNDATION UPDATE TO CLUB

Appleton Rotary Foundation President, Donna Kidder, first acknowledged those currently serving on the Foundation board: Treasurer: Kevin Loomans, Investment Liaison: Jeff Esker, Grant Liaison: Lynn Peters, Other board members: John Nygaard, President Jennifer Stephany and President-Elect Chad Hershner. The Foundations total assets as of the end of our fiscal year June 30, 2016 was over \$1.1 million. This is including our pass through accounts and we are looking into reallocating the balance in the SAMP checking. We have 6 foundation funds that are invested by the Community Foundation with a long-term focus. Included in this group is the Scholarship fund (which represents 29% of our portfolio), Heeter fund (8.8%), Groth fund (6.4%), Art Scholarship (5.8%), Community Service (6.5) and Helen Thom Roemer funds representing 43% of the portfolio. These funds are subject to an annual distribution policy of 5% of the rolling 12 quarter average value. This approach helps to minimize annual fluctuations due to market performance. With regard to investment performance for the foundation year we began first quarter of 2016 having the worst start to a year ever for US stock market. We recovered in March-May, but June the market was caught by surprise with Great Britain's vote to leave the European Union; causing a temporary setback. Starting this fiscal year, however, markets rallied around the world, US included, on better economic data with US and China leading the way. Portfolio changes were made in Spring of 2016, due to poor performance in 2015. Investment committee worked with consultant to restructure and refocus our portfolio. We have seen early success from these changes with outperformance once again vs benchmarks. Plans for 2017 are to review the 5% spending policy. It has been in place since 1995, but current economic and market environments have not provided returns sufficient to support the 5% level. Forecast is for further low returns. Many community foundations have reduced their spending policies. Cumulative Fund Distributions shows a total of over \$640,000 that this club has donated from 2003-2016. Annually our scholarship fund awards three scholarships of \$4,000 paid over a four-year-period to seniors from the five Appleton High Schools. The Heeter fund provides dollars to Rotary International for Paul Harris Fellowships on behalf of individuals who received the Charles and Adele Heeter Outstanding Community Leadership Award. Paul and Elaine Groth World Community Service fund provides financial support for international projects endorsed by the World Service committee. The Arts Scholarship fund supports individuals who seek educational experiences in his/her art field. The Community Service fund was established to direct charitable donations to address local community needs. The Helen Thom Roemer Trust provides support to projects that serve the needs of children with limited physical and cognitive abilities in the Appleton area. All of these funds were started by a Rotary member past or present. We are very blessed to have the ability to continue the good works that these funds provide. Rotary Members contribute to our Foundation through annual gifts, memorials or bequests. In the 2015-2016 fiscal year our members donated \$58,000. We were blessed with a donation from the Sylarn Foundation, based out of Marquette, MI. If it weren't for the donation from the Sylarn Foundation, we would be looking at low member donations. One of President Jennifer's goals for this year is to strengthen support for our own Foundation and for Rotary International. President Jennifer Stephany went over the budget for this fiscal year. 2017 is our Centennial year so our club is looking at completing a project in downtown Appleton. This project is to be determined but the Centennial committee, which has been put in place. The club is also revamping our Rotary Shines event. It will be held at Riverview Gardens and will be open to the public. We need to do a better job with sharing our story and what better way to do so then to have a public event with a field to fork dinner. All proceeds from Rotary Shines will be going to our Centennial project. The 2016-2017 Annual budget and balance sheet is attached. If you have any further questions regarding this please contact President Jennifer.

ANNOUNCEMENTS

- Beginning on January 10, 2017 our meetings will be held at Riverview Gardens. Thank you to Nancy Leipzig and John Nygaard for all of your hard work looking for a new location.
- This year Appleton Downtown Rotary is again co-sponsoring a Rotary Youth Exchange student with the Appleton Breakfast Club. Giuliana (Giuli) Bonzi arrived in the Fox Cities in August from her home in Barranqueras, Argentina. Giuli has two older sisters (21 and 19) and a brother who is 18. She is 16 years old, is attending Kimberly High School and living with families in the Kimberly school district. Her favorite subjects are physics, math, literature, English and music. She loves sports especially basketball and she loves music. She plays the piano and guitar and also sings. When asked what she wanted to do while in the Fox Cities, she said she wants to experience everything there is to see and do. We hope to have Giuli visit our club before the end of the year so many of you can meet her and start to get to know her. We expect she will join us for many meetings in 2017.

7 DAY NOTICE

The following individuals have been proposed for membership in Rotary. They have passed all committees and unless an objection in writing is submitted to the secretary within 7 days, these members will be admitted to the Rotary Club of Appleton.

Colleen Bennett of 4693 N. Lynndale Dr. Appleton, WI 54913 has been proposed into membership by Sridhar. She would enter under the classification of Accounting Services Management.

Dori Sterkenburg of 4865 N. Latitude Lane #D, Appleton, WI 54913 has been proposed into membership by Barbara Merry. She would enter under the classification of Human Resources.

NOVEMBER 29th – ETHICS IN BUSINESS PANEL DISCUSSION

Ethics in Business Program Panel For the past 100 years, the Appleton Rotary Club has been a cornerstone organization in the Fox Valley community comprised of business leaders who subscribe to a nonpartisan and nonsectarian ethical guide, The Four-Way Test, in their personal and professional relationships. Of the things we think, say or do, we ask these questions:

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?

In a national environment where the ethical practices of businesses are called into question on a daily basis, The Four Way Test is more relevant than ever. The Appleton Rotary Club is hosting a panel discussion comprised of local business leaders about how both the discussion of ethics and practice of ethics is integrated into work life. Explore with fellow leaders how to set the ethical tone of your organization from the top.

GUESTS, VISITORS AND MAKE-UPS

There Were No Visiting Guests this week

There Were No Visiting Rotarians this week.

There Were No Make ups this week

2016 HOLIDAY CELEBRATION ANNOUNCEMENT

The holiday season is here and it is time once again for the annual Rotary Holiday luncheon hosted by the Holiday Celebration Committee. This year's event will be **held at the Radisson Paper Valley Hotel** on Tuesday, December 20 from 11:30 to 1:00pm. Entertainment will be provided by the Neenah High School Madrigal Singers. **Please sign up at the registration table starting November 22nd so we have an accurate count of Rotarians and guests.** You may also email your RSVP to Meghan at rotaryappleton@gmail.com . **RSVP or sign up by Dec. 16th!** There will be a \$12.00 charge for guests and "attendance not required" members.

As is our holiday tradition, we will again collect cash donations and items for those in our community who are less fortunate. This year's charitable recipient is the Fox Valley Warming Shelter. Donations of cash and goods will be collected at the Holiday Lunch. Below is a "Wish List" of items provided by the Fox Valley Warming Shelter:

1. CASH- Checks can be made to Fox Valley Warming Shelter. We collect no fees from sales or service and have no guaranteed funding from year to year. Every dollar is greatly appreciated!
2. Ear Plugs! (Can be purchased at Harbor Freight, [3325 W. College Ave. Item 96365](#)) or any hardware store. Clients use ear plugs every night to drown out the snoring and other night sounds that come from sharing the floor with 60 people sleeping on mats.
3. Gift cards to Walmart, Fleet Farm or Shopko to give to clients for essential items, such as steel toed shoes
4. Fast food gift cards (Taco Bell, [Cousins Subs](#), McDonalds, Burger King, etc.)

