



# ROTARY CLUB OF APPLETON GUSTO

Service Above Self

## November 24th , 2015 Upcoming Programs

### December 1st, 2015

#### **Radisson – Empire**

NFP Roundtable with a theme of addiction

Thought of the Day: Video

### December 8th, 2015

#### **Radisson – Salon CD**

Music and the Brain

Thought of the Day: Jennifer Stephany

## Officers 2015-2016

### **President**

Sridhar

### **President-Elect**

Jennifer Stephany

### **Past President**

Deborah Wetter

### **Secretary**

Chad Hershner

### **Treasurer**

Gary Hermsen

### **Directors**

Rosie Cannizzo

Ruth Ann Heeter

Sonia Barham

Andrew Micheletti

Jake Woodford

Alan Blake

John Nygaard

### **Sergeant-At-Arms**

Jon Kester

### **Rotarian of the Year**

Mary Harp-Jirschele

### **Admin. Assistant**

Meghan Warner

Phone 205-5255

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### **Membership – 167**

Downtown Gusto  
Meghan Warner, Editor  
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P. O. Box 703  
Appleton, WI 54912  
[www.appletonrotary.org](http://www.appletonrotary.org)

Meets Tuesday Noon

## APPLETON ROTARY FOUNDATION REPORT 2014-2015

As President of the Appleton Rotary Foundation I am pleased to give the annual report to the Club on the Foundation's activities.

Current Foundation Board members are:

President Nancy Johnshoy

VP/Secretary Donna Kidder

Treasurer Kevin Loomans

Board Member At Large Curt Detjen

Board Member At Large Jeff Esker

Board Member At Large Andy Rossmessl

Club President Sridhar

Club President Elect Jennifer Stephany

The Foundations total assets as of our fiscal year end on June 30, 2015 were \$1,192,685.51 (including checking accounts). We have 6 foundation funds totaling \$1,188,053.04 that are invested by the Community Foundation with a long-term investment focus. Included in this group are the Scholarship, Heeter, Groth, Art Scholarship, Community Service and Helen Thom Roemer Funds. 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. The fiscal year ending in June was exactly flat in terms of investment results with a total return of 0%. That return was reflective of mixed markets for the period. Domestic equities were positive in the 8% range but international equities, fixed income and real estate were all negative. Total distributions in the 2014/2015 fiscal year were \$48,567.68. Since 2003 our Foundation Fund distributions have totaled \$582,143. The Scholarship Fund has a fund balance of \$344,478. We currently award three scholarships of \$4,000 paid over a four-year period to seniors from the five Appleton high schools. The fund also contributes to the U.W. Fox Valley and Fox Valley Technical College Foundations for non-traditional student scholarships. This year the two school foundations received \$2,500 and \$2,485 respectively. The Charles Heeter Fund has assets of \$104,745. Last year \$4,788 was transferred to Rotary International from for Paul Harris Fellowships on behalf of the individuals who received the Charles and Adele Heeter Outstanding Community Leadership Awards. The Arts Scholarship Fund balance is \$69,014. The fund supports individuals who seek educational experiences in his/her art field. The Art Scholarship Committee awarded scholarships last year in the amount of \$1,488. The Paul and Elaine Groth World Community Service Fund provides financial support for international projects endorsed by the World Service Committee who approved grants this year totaling \$1,000. This funds year-end balance was \$76,451. The Helen Thom Roemer Fund provides support to projects that serve the needs of children with limited physical abilities and cognitive deficits in the Appleton area. Last year, the Children with Disabilities Committee approved requests totaling \$23,776. This is our largest single fund with a balance of \$516,484. The Community Service Fund was established to direct charitable donations to address local community needs. The Community Service Committee has a balance of \$76,451 and approved grants of \$3,363 in the last year. The Foundation also maintains pass-through checking accounts for the Appleton Rotary Foundation and various other projects. These accounts insure that your donation is tax deductible and that the beneficiaries have ready access to that cash. As of the fiscal year end we had a total of \$4,632.47 in checking accounts. As mentioned, our Foundation fund distributions are based on 5% of a rolling 12 quarter market value of each fund. Over the last 12 years our contributions have tallied an impressive total of \$582,143. As illustrated on slide two of the attached, the most significant amounts stay right here in our community to support scholarships, Community Service and Children with Disabilities committee projects. This amount does not include funds that have gone directly to Rotary International to support projects like Polio Plus. Rotary Club members contribute to our

Foundation through annual gifts, memorials or bequests. This page 3 of the attachment shows our annual gifting totals to Foundation Funds for the last twelve fiscal years. In the 2014/2015 fiscal year our members donated \$6,706 to the six Foundation Funds. As was the case last year, member contributions to our Foundation totaled about half of the previous five year average. One of President Sridhar's goals for this year is to strengthen support for our own Foundation and for Rotary International. He will be speaking next and sharing his plan to make that goal happen.

A final thank you to the committees who steward our funds and who continue the important work of Rotary in our community and around the world.

Nancy Johnshoy  
President , Appleton Rotary Foundation

#### **GRANTS COMMITTEE-LYNN PETERS**

A grants task force was formed to develop a proposal for the club to strategically/systematically pursue district and global grants. A committee is now being formed and there will be a process that needs to be followed so the club can fully utilize all the funds available for matching by the district and RI. Attached is a matrix to review. If you have any questions regarding the Grants Committee, please contact Lynn Peters.

#### **PAUL HARRIS INCENTIVE**

One of the important strategic goals for the Club during the year 2015-16 is to strengthen the Rotary Foundation locally, and the Rotary International Foundation. The objective of our incentive plan is to make Paul Harris Fellowship affordable. We intend to create a pool of Foundation Recognition points transferred by members. Any Rotarian who makes a minimum donation of \$ 500 will be eligible to receive a Paul Harris Fellowship. Of the \$500 donation, \$250 will be earmarked for Rotary International Foundation. The remainder of \$ 250 will be directed toward Appleton Rotary Foundation. The difference between the points needed for the Fellowship and the dollars donated will be made up by drawing from the pool subject to a maximum of 750 points per person. Attached is President Sridhar's presentation for your review. If you have any questions, please contact President Sridhar or Meghan.

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#### **ANNOUNCEMENTS**

- The Holiday Celebration is set for **Tuesday, December 22, 2015** at the Radisson Paper Valley Hotel.
- The Courtesy Award Committee would like you to keep an eye out during the Holiday season for extraordinary service throughout the community.
- The SAS committee has scheduled the club for gift wrapping at the Fox River Mall on December 9<sup>th</sup> for Habitat for Humanity. If you are interested in signing up there will be sign-up sheets at our next meeting.
- The SAS Committee also signed the club up for bell ringing on December 23<sup>rd</sup> at the Northland Festival Foods from 3-8pm. They are looking for 5 Rotarians to volunteer. Please email Paul Hillmer at [paul.hillmer@associatedbank.com](mailto:paul.hillmer@associatedbank.com) if you are interested in volunteering.
- It's that time of year again! This year we have selected Hughes Chocolates for our Holiday Fund Raiser. We have added some options to included Dark Chocolate, Milk Chocolate and Milk & Dark as well as Crawlers aka Turtles. Our deadline for orders will be **December 8th** with pickup at our **December 15th** meeting.
- Recently Deborah Wetter had her hip replaced. She has reported to Meghan that she is home and recovering well and is looking forward to coming back soon.

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#### **GUESTS, VISITORS AND MAKE-UPS**

**There were No Guests this week**

**There were No Visiting Rotarians this week**

**There were No Make ups this week**

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#### **DECEMBER 8<sup>TH</sup> – MUSIC AND THE BRAIN**

Music's connection with society can be seen throughout history. Every known culture on earth has music and it has been proven that music influences humans in both good and bad ways. On Dec. 8<sup>th</sup> Brian Pertl will be here to talk about how music's impact on the brain.