ROSSMOOR ROTARY NEWS

President: Sue A **Address:** PO Box 2177, Walnut Creek CA 94595 D5160 Club 461

Notes: Jim O **Photos**: Paul W Nov 15, 2023

Club Website: www.rossmoorrotary.org **District Website: www.rotary5160.org**

MEETING NOTES: 11/15/23

Call to Order: Sue A. Our meeting was fragmented. 21 members attended while 18 members attended the „HUMAN RIGHTHS CONFERENCE‟ in the Event Center that we co-sponsored. Pledge: Jim O-Substitute, Patriotic Song: National Anthem

Thought for the Day: Jim O. quoted Anne Frank, "No one has ever become poor by giving."

Happy Dollars: Peter S. for his wife Kathy; Peter V.S. because he's generally happy; Ruth R.; Mieko for her daughter from London's visit; Mitzi, for her husband George‟ recent honor; John K. his last surgery; Sue, happy for having a short meeting.

ANNOUNCEMENTS

Holiday SEE'S Candy Sale- John R. said our Rotary Foundation will again be fund raising this
December with the sale of See's Candies at Rossmoor shopping center Safeway; Rossmoor Gateway Clubhouse; and Waterford. Sign-up sheets for members working 2-hour increments will be out at our next meeting, November 29. We encourage all members to volunteer their time.

The Rotary Foundation- (Every Rotarian Every Year-EREY)- John Bernardin-The Rotary Foundation Chair explained the importance of member contributions to Rotary International and it‟s good works, the tax advantages, and membership in the Paul Harris society.

Raffle Winners: Peter V.S. wine; Irv (again) lunch.

PROGRAM

John R. presented the Annual report to members of the accomplishments of the Rossmoor Rotary Foundation last year. There is often confusion about two separate legal entities, i.e., the Rossmoor Rotary Club, and the Rossmoor Rotary Foundation. John explained. The Club is part of Rotary International, District 5160 (covering the area from Weed to San Ramon), and Fab 5 (Lafayette, Lamorinda Sunrise, Moraga, Orinda, and Rossmoor). Our Rotary Foundation is a "California Nonprofit Public Benefit Corporation. It is a 501(c)3 non-profit with the purpose of funding local and international charities. Contributions to the Foundation are

tax-deductible, not so the Club. RRF is totally independent of the Club. There are 12 members of the Foundation: 3 Officers and 9 Trustees.

Last year the Foundation funded $145,150 in grants to local charities. Of special importance is that donations to the Foundation by Club members totaled $61,000. Administrative costs were 0.4%. Notable fund-raising events are the annual Cancer, Alzheimer, and Parkinson's "Gala," and See's holiday candy sale.

How we can contribute. Any "happy dollars" over $50 goes to the Foundation. Required Minimum Distribution (RMD) from IRA"s is another, bequests, and cash are also ways to contribute.

Any member can propose a grant and submit a grant application for a cause he/she thinks worthwhile. The Foundation Grants Committee review and recommend to the Board what is submitted.

Finally, ALL CLUB MEMBERS are members of the Foundation. They can attend Foundation Board meetings on the third Wednesday of the month and participate in discussions, although they cannot vote.

UPCOMING EVENTS

Nov 22	DARK – Happy Thanksgiving!
Nov 29	Dennis Baldocchi – UCB Dutch Slough Contra Costa County
Dec 6	10:30 RRF Trustee Meeting
Dec 6	TBD

PHOTOS

John K and Sue A

Rotary

RRF Annual Financial Report 2022-2023

Rossmoor Rotary Foundation Members' Meeting November 17, 2023

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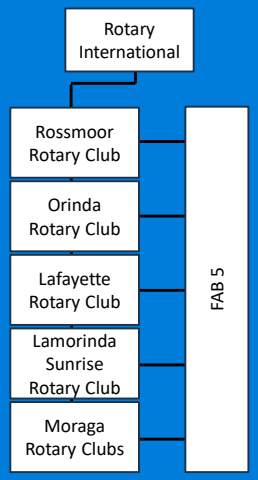
Rotary



THE Rotary Foundation
Separate Legal entity/Board

International Projects
501c3 Charitable Organization
Tax deductible
Paul Harris Fellowships - Bling

Rossmoor Rotary Foundation
Separate Legal entity/Board

Local Projects
501c3 Charitable Organization
Tax deductible
No Bling

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Rotary

Rossmoor Rotary Foundation Trustees 2022-23

John King- Chair

Eddie Fisher
Vice Chair

Freda Atkins
Trustee

Paul Wilson
Secretary

Sharon Long
Treasurer

John Rice (NV)
Assistant Treasurer

Ruth Reeves
Trustee

Connie Palladino
Trustee

Bob Sellinger
Trustee

Bill Broxham
Trustee (IPP)

Sue Adams
Trustee (PE)

C. David Brown
Trustee (P)

Jim Olson
Trustee

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Rotary

Rossmoor Rotary Foundation Trustees 2023-24

Eddie Fisher
Chair

Patrice Jensen
Vice Chair

Marleen Miller
Trustee

Freda Atkins
Secretary

John Rice
Treasurer

Sharon Long
Trustee

Jim Olson
Trustee

Connie Palladino
Trustee

Ron Brown
Trustee

Carolyn Hinrichs
Trustee (PE)

Sue Adams
Trustee (P)

C. David Brown
Trustee (IPP)

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RRF Annual Financial Report 2022-2023

- ✓ Grants Paid $145,150.00

Legal Name	Grant
Parkinson's Network Of Mt Diablo	$40,000.00
Rossmoor Scholarship Foundation	$14,000.00
Alzheimer's Association	$10,000.00
Choice in Aging	$10,000.00
Hospice of The East Bay	$9,000.00
Cure Alzheimer's Fund	$6,000.00
Lamorinda Adult Respite Center	$6,000.00
Hope Hospice	$5,000.00
Meals on Wheels	$5,000.00
Diablo View Rotary Foundation	$5,000.00
Lamorinda Sunrise Endowment Fund	$5,000.00
Rotary District 5160	$3,950.00
Monument Crisis Center	$3,500.00
Trinity Center	$3,500.00
CASA Of CCC	$2,500.00
Foodbank Of Contra Costa & Solano	$2,500.00
Love Never Fails	$2,500.00
Planting Justice	$2,500.00
Winter Nights Shelter	$2,000.00
AAUW-OML	$1,500.00
Christmas For Everyone	$1,500.00
Contra Costa Crisis Center	$1,500.00
Project Healing Waters	$1,500.00
REAL International	$1,200.00
TOTAL	$145,150.00

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RRF Annual Financial Report 2022-2023

- ✓ Grants Paid $145,150.00
- ✓ Assets $ $1,021,593.66

Assets		
Bonds	$606,835.08	59.4%
Stocks	$313,059.75	30.6%
Investments	$919,894.83	90.0%
Accrual	$0.00	0.0%
Cash	$101,698.83	10.0%
Total	$1,021,593.66	100.0%
Unrealized	$263.03	

Restricted or Committed	
Trommershausen Fund	($118,643.70)
Medical Scholarship	($8,500.00)
Total	($127,143.70)
Net	$894,449.96

as of 6/30/2023

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RRF Annual Financial Report 2022-2023

- ✓ Grants Paid $145,150.00
- ✓ Assets $ $1,021,593.66
- ✓ Income $187,488.75

INCOME	
AP2022	$65,583.17
CAP2023	($6,449.00)
Car Donation	$243.00
Donation RRF Members	$61,084.73
Donation RRF Public	$300.00
Interest Inc	$57.31
Jeha Memorial	$24,229.97
Memorials	$0.00
Rossmoor Rotary Club	$0.00
See's Candy	$6,304.03
St Patrick's 2022	$0.00
_DivInc	$31,369.02
_LT CapGnDst	$4,766.52
_ST CapGnDst	$0.00
TOTAL INCOME	$187,488.75

as of 6/30/2023

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RRF Annual Financial Report 2022-2023

- ✓ Grants Paid $145,150.00
- ✓ Assets $ $1,021,593.66
- ✓ Income $187,488.75
- ✓ Expenses $141,195.39
- ✓ Admin 0.4%

EXPENSES	
Bank Charge	$96.27
Credit Card Payment	($236.88)
Grants - Alz/Park	$91,000.00
Grants - Domestic	$39,650.00
Grants - International	$0.00
Grants - Rotary Matching	$10,000.00
Office Supplies	$0.00
Printing and Reproduction	$0.00
Prof and Legal Fees	$611.00
Regulatory Fees	$75.00
TOTAL EXPENSES	$141,195.39
OVERALL TOTAL	$46,293.36

as of 6/30/2023

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How can you help?

- ✓ Donations
  - Happy $$ over $50
  - Cash donations
  - IRA RMD disbursements
  - Bequest, etc.
- ✓ Grants
  - Any member can submit a grant application
  - The grant committee does due diligence
  - Recommends action to the RRF Board of Trustees

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Any Questions?

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