

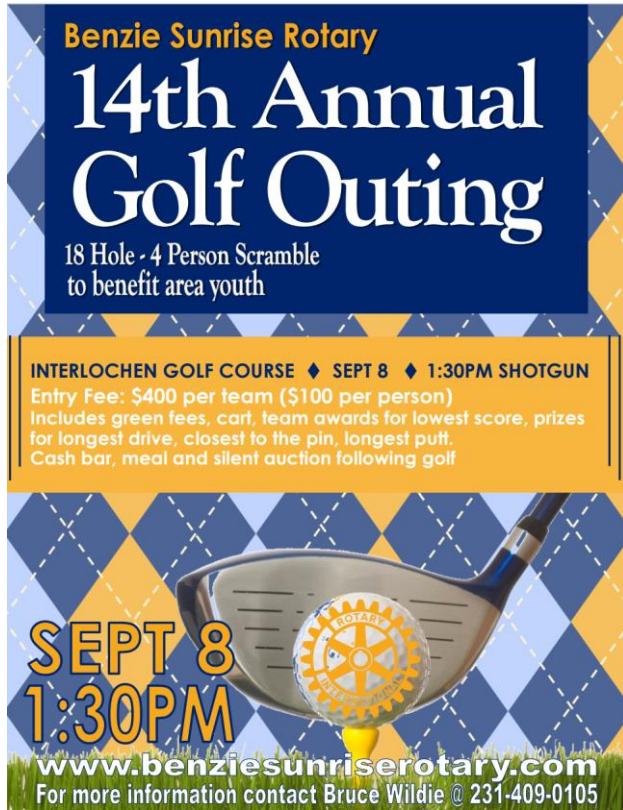


Assembly Agenda September 17, 2024

- **Ice Breaker Question:**
 - What is a favorite thing you like to do this time of year?
 - Or, what do you appreciate about September?
- **Reports from Ad Hoc Committees**
 - Membership
 - Financial Literacy
- **Website -- Club Runner**
 - Updating your picture & interesting facts

THANKS

Pat & Bruce!!



2025 Date TBD
Waiting on Iron Man date



Number of Participants

- 2024: 57
- 2023: 36

Sponsorship Amounts

- 2024: \$4,250
- 2023: \$3,700

Total Profit

- 2024: TBD
- 2023: \$6,024

Hidden Harvest: Potato Diggers Needed



- **When:** 3pm - 6pm Saturday September 21st
- **Where:** Buzzy's Farm (Ryan Noonan's Farm)
- **Address:** 624 West Traverse Highway, Maple City, MI 49664
- **Parking:** Look for Healthy Harvest signage and the Food Rescue truck



AD HOC MEMBERSHIP COMMITTEE

Club Assembly Report
September 17, 2024
Carol Burns

We started with Visioning

We want to be a bigger club.
(Currently 38 members)

- Welcoming to guests.
- Identify those new in town

Club culture

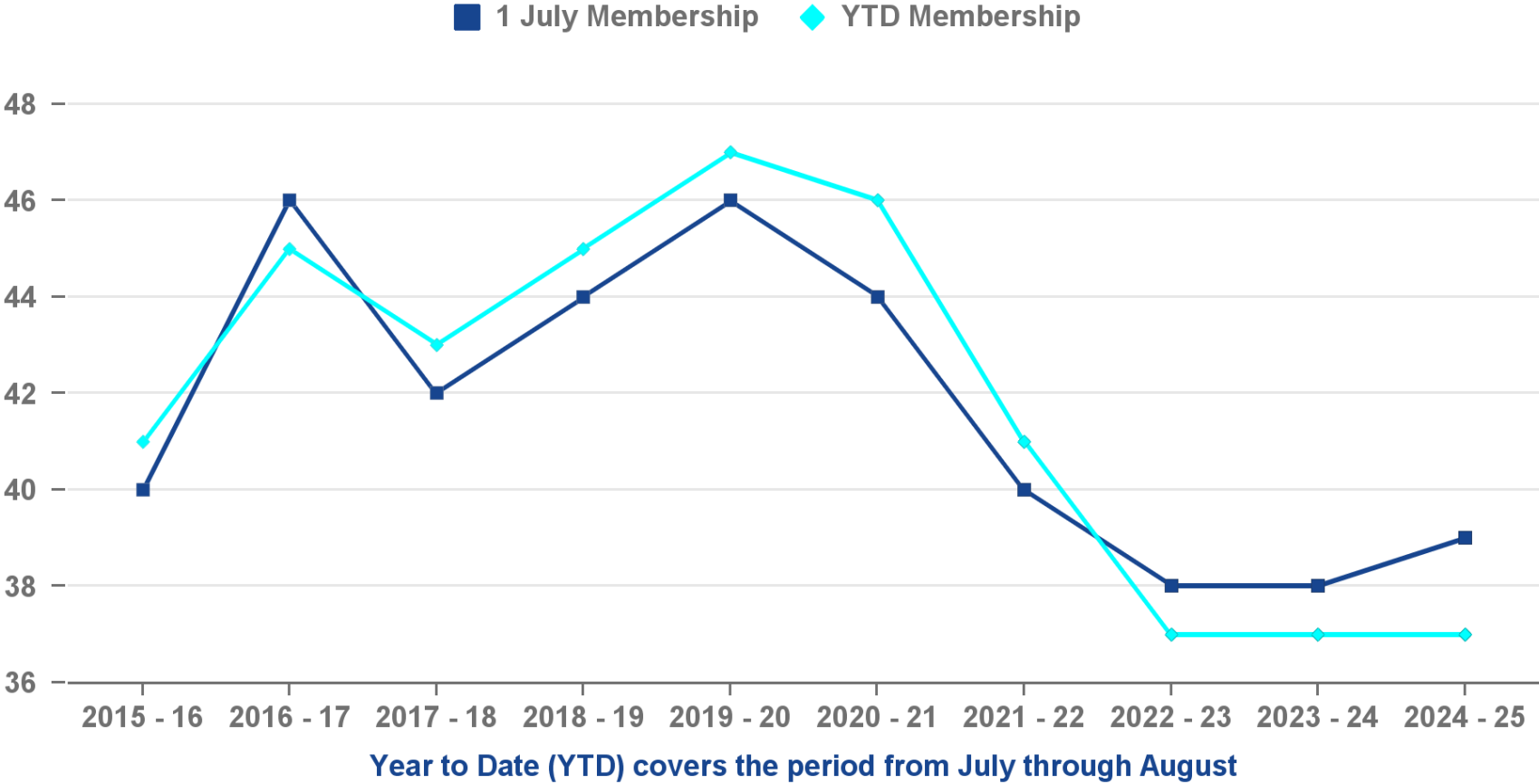
- We are active in community
- New members are engaged



Brainstorming and ideas (July 2024)

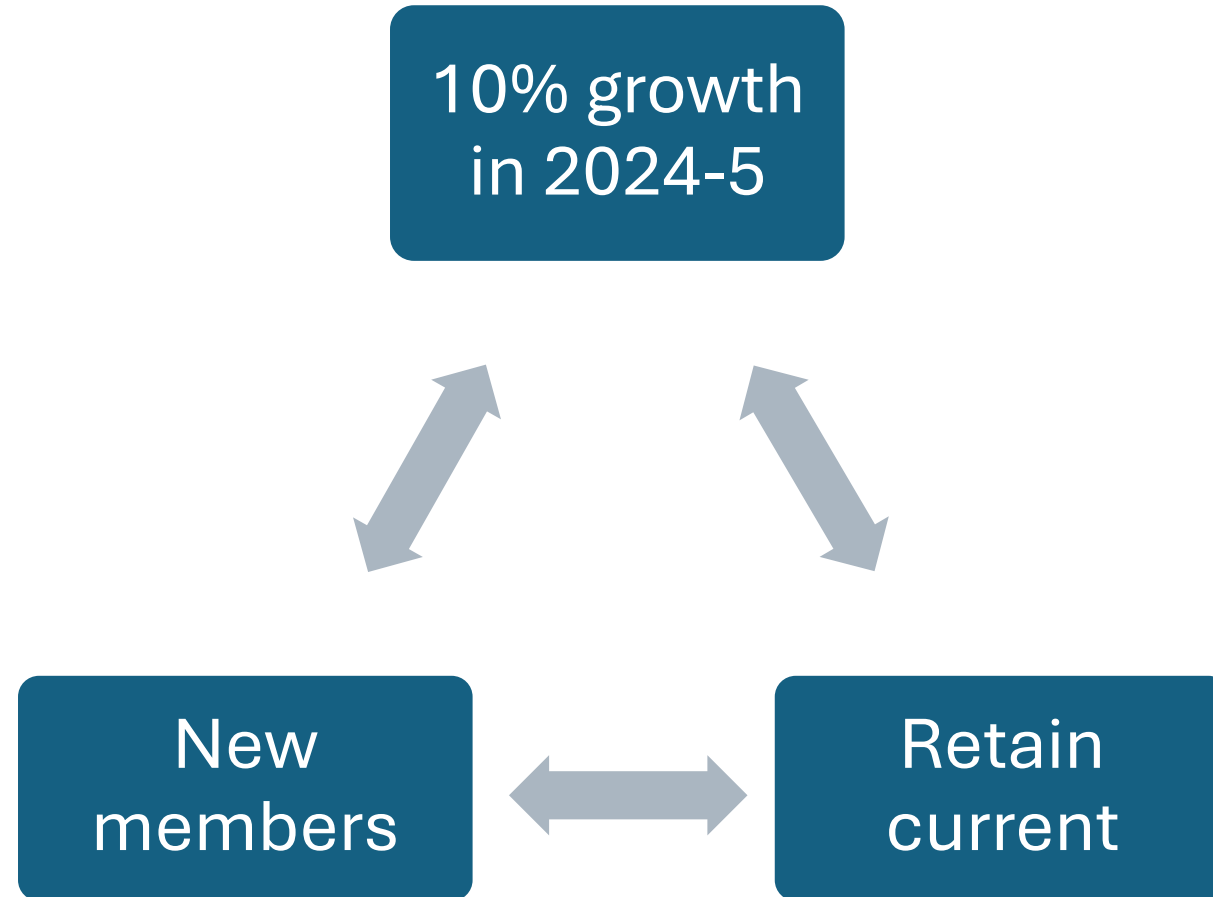
- What can be done to see more members actively looking for new members?
- What are the sources where a membership committee could actively identify new members?
- How can we identify & welcome community members?
- What can each member do to identify and attract active retirees?
- How can we embrace guests & encourage prospective members?
- How could we improve the onboarding of new members to help orient & engage them?

Our membership has declined



Ad hoc membership committee

Keeping it simple



New members

- Encourage bringing guests (keep track)
- Meeting culture that is welcoming
- Recognize demographics of Benzie County

** Path to membership is guests. Recognize member(s) who bring the most guests

Retain Current Members

- Why do members leave? (review exit surveys)
- Are new members engaged and active?
- Is our onboarding process working?

** Have coffee with a new member in lieu of formal orientation

Projects & Programs Coordinators

Project / Program

- K-3rd Grade PoWeR! Book Bags
- 1st Grade Reading
- 3rd Grade Dictionaries
- 6th Grade Crystal Lake Walkabout
- 8th Grade NMC's Building Tomorrow
- 10th Grade NMC Tour **
- 11th Grade Ferris College Trip
- 12th Grade Career Expo
- Graduate Recognition **
- High School Interact co-advisors
- Scholarship Program/Support
- BACN Food Drive Volunteers
- Goodwill Food Rescue Volunteers
- Pints for Polio

Coordinator

Val Gerhart
Kim Simon
Barb Skurdall
Dave Wynne
Kathy Neveu
Val Gerhart
Val Gerhart
Val Gerhart
Terry Taylor
Kathy Neveu
Kathy Neveu
David Oellerich
Dave Wynne
Tim Griffen (2025)

Partner

Bruce Gerhart
David Oellerich
Bruce Wildie
Bruce Rowland
Warren Richter
Pat Kiely

Val Gerhart
Val Gerhart
Phyllis Kladder
Jack Harnish
Barb Skurdall
Jim Drubert

What's next

Meeting on September 24. We'll be discussing...

- Ad hoc vs. standing committee
- Who should be “in charge”?
- Balance “engagement” with “over-extended”
- **Other?**

Questions and Discussion

Thanks to our team members

- Dave Wynne
- David Oellerich
- Warren Richter
- Val Gerhart
- Chris MacInnes
- Linda Wood
- Jim Drubert

What We Want Members to Understand

- Deeper understanding of club financials
- Three entities of club financial literacy
 - ✓ Club's Foundation
 - ✓ Club's Operation & Projects Budgets
 - ✓ The Rotary Foundation

Financial Make-up of the Benzie Sunrise Rotary Club

Club

Dues & Fundraising

Two budgets: Operations & Projects

Foundation: 501(c)(3)

Endowment, Sponsorships & Donations

Two funds: Endowment & Grants

Benzie Sunrise Rotary Foundation Endowment at the GTRCF

To provide financial resources that in the spirit of Rotary, will support projects which will assist in the development of our youth and enhance the quality of life in our local community.

- **Principal managed by GTRCF**
 - Cannot be removed
 - We receive annually 4% of its growth
- **Held at GTRCF, approximately \$53,000**
- **Consider endowment in your estate plan**

Benzie Sunrise Rotary Foundation Grants Fund

Available Funds

- Held at Honor Bank, approximately \$30,000
- 4% withdrawal rate from our endowment at held by the GTRCF
- Sponsorships for Bike Benzie Tour
 - State, regional, & local businesses
 - Club members donate as sponsors
 - Secure match dollars through GTRCF's Rotary Charities Match Program
- Donations, memorials
 - IRA Required Minimum Distribution

Grants Given Quarterly 2023-

2.

7/2023	Benzie Welcome Corps	\$1500.
• 7/2023	PoWeR! Book Bags	\$5000.
• 10/2023	BAHS- tinting in museum	\$4200.
• 10/2023	BEST- Career Expo	\$ 250.
• 1/2024	Homestead Hills Elementary	\$1000.
• 1/2024	MLAP- Raindrops Program	\$1500.
• 1/2024	BCCHS Band Parents	\$1890.
• 4/2024	BWAC- Feasibility	\$2000.
• 4/2024	COGnition- Scholarships	\$2000.
• 4/2024	Benzie Senior Resources	\$2000.
• 4/2024	Advent Lutheran Summer Camp	\$1887.

Benzie Sunrise Rotary Foundation Board

Foundation Chair



Dave Wynne

Treasurer

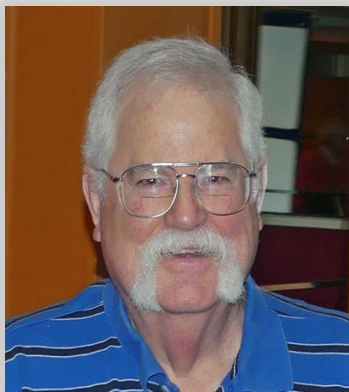


Phyllis Kladder

Secretary



Carol Burns
2021-2024



Phil Lambert
2021-2024



Gary Gordon
2022-2025



Jim Drubert
2023-2026



Warren Richter
2023-2026

Club Funding

Operations: \$14,200

Dues, 50/50, Happy Dollars Cover:

- RI & District dues
- Club website
- PETS registration (PE & PN)
- Lucky Dog rental
- Breakfast
- Library books, speaker recognition
- Technology
- Advertising/printing
- Supplies/postage
- Presidents' discretionary

Projects: \$21,500

Fundraisers Cover:

- Club's International projects
- Club's School programs
- Club's Community programs

Fundraisers

- Lucky 13 Raffle
 - Ticket sales
 - Donations in lieu of selling tickets
- Golf Outing
 - Golfer registrations
 - Sponsorships
- Bike Benzie Registrations

Board Officers

President



Valerie Gerhart

President Elect



Terry Taylor

President Nominee



Carol Burns

Immediate Past President



Jim Drubert

Treasurer



Phyllis Kladder

Secretary



Pat Kiely

Sergeant at Arms



Bruce Wildie

Directors



Linda Wood



Angela Quinn



Jack Harnish



Kim Simon

The Rotary Foundation (TRF)

The Rotary Foundation helps Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.

- Polio eradication: The major project funded through TRF
- Global grants: 1098 in 2022-23 (we participate in Wheels of Hope & Malawi Bicycle projects)
- Disaster relief: flooding in Pakistan, war in Ukraine, earthquake in Turkey & Syria
- Rotary Peace Centers, Peace Scholar and Global Scholar programs
- New: Programs of Scale: first award going to End Cervical Cancer in Egypt
- District Local Grants: Back the Track, Imagination Library, Food Pantries, Garden Theater, BACN

Why do we ask club members to donate?

As a club, when our giving averages \$100/member,
we qualify for a District Local Match Grant

Summary

- Benzie Sunrise Rotary Foundation
- Benzie Sunrise Rotary Club Operations & Projects Funds
- Rotary International Rotary Foundation (TRF)

Question?