



Annual Reunion of  
Rotary International Past Officers  
San Diego, 17-19 January 2010

San Diego Rotary International Assembly 17-24 January 2010

## THE REUNION WHEEL

Monday, January 18, 2010

### Plenary Session III

#### *"What's New in Rotary"*



General Secretary Ed Futa (upper photo), Peter Markos (center) and Peter DeBerge (lower photo) presented updates on where Rotary stands today with respect to membership, informational services and financial performances vis-a-vis investments.

Looking to the future, Ed enumerated the following:

Strategic Focus: We are an organization that is destined for greatness, but several points need to be addressed:

Future Vision Pilot: Preparing for the second generation of Rotary International!  
Largest decrease in membership in a one year period since 2002!  
PolioPlus challenge is before us: encouraging findings regarding meeting the goal.  
We have nothing but outstanding potential in front of us—potential is everything if we can transform it into everything it can be for our organization!



#### **Peter Markos, Chief Information Officer**

There has been a complex and inefficient information system at RI! My job, he stated, is to try and to 'clean up' RI's informational system—to simplify it!



We will be focusing on three platforms: relationship management, collaborative internet platforms and information systems priorities:

Expand capacity to provide service at the enterprise level.  
Prepare for the transfer of wealth: managing tracked gifts.  
Maintain institutional credibility: data security and privacy!  
Future Vision pilot: focus on the online experience.

Progress to date:

We have replaced core membership system: members, clubs, committees.  
We are merging additional constituents: spouses, club sponsored organizations.  
We are, this quarter, completing endowment tracking and management.  
Recognition processing begins this month.  
Initial Future Vision online access will be available this quarter.

#### **Pete DeBerge, Chief Financial Officer:**

The past 18 months—what happened?

Financial crisis—the worst decade in US equities market.  
The Perfect Storm!—pressure on contributions and giving coupled with worst economic times in the world.

## What did we do?

Contingency plans have been (and continue to be) explored.  
Spending reductions implemented.  
Investment decisions regarding each of the four funds have been reviewed.  
Reserve (general surplus fund) was reviewed and it has weathered the storm.  
Communications: attempted to keep everyone informed.—full transparency with all Rotarians!

Current returns on investment have been low, but this is due to the world financial crisis. We are on the rebound—RI funds are now up! We have not had to sell any of our securities during this downturn period! We had realized losses, but we did not need to sell any of our portfolio. The real indicator is that we did not have to sell securities in order to operate!

## Where are we now?

Membership/dues revenue are on track. Club payments are coming in on time.  
TRF contributions are off only 1% versus prior Rotary year.  
Positive investment returns thru 30 November.  
Tight spending budgets and favorable variances improved operating reserves:  
    RI-US \$35 million over bylaw goal  
    TRF—now positive  
Permanent fund above historical value.  
Cash flows remain strong.

## What's the Financial Outlook?

Slow economic recovery.  
Financial markets remain volatile.  
RI finances remain strong.  
    Future dues increases will be necessary.  
TRF finances are mixed.  
    PolioPlus funds are secure.  
    Pressure remains on the Annual Program Fund (APF).  
    More conservative APF investment policy?  
    Contributions?  
    Future Vision impact?  
Strong Rotary financial governance at various levels.

Q and A's: *Could this be considered a "Black Swan" scenario?* Yes, it is one of the scenarios and a strong probability. We will continue to look at our investments, especially since real estate investments are the biggest drain on the permanent fund right now. Conservative investment policies, however, will remain.

## Plenary Session IV

### *“Past Presidents Tell It Like It Is” --Panel Presentation*



**PRIP Cliff Dochterman 1992-1993 (Real Happiness is Helping Others) -- top photo:** We need to look at questions facing our organization's future:

What are the critical issues coming before the COL?  
Is the world getting tired of the PolioPlus campaign?  
What are the issues of (Rotarian Action Groups) RAGs?  
Membership issues -- what are they?  
Is Rotary a service organization or are we becoming a fund raising group of men and women?



**PRIP Frank Devlyn (Create Awareness Take Action) -- second photo from top:**

Rotary is not for everyone, but it is for people who like other people and who want to help others. How can we all help? The RAG is the best thing to happen within our organization. E-Clubs are important for the future! We must continue to have a passion for Rotary. Believe in PR and the good it can do for our organization. The Family of Rotary wants to see progress!



**PRIP Wilf Wilkinson 2007-08 (Rotary Shares) -- second photo from bottom:** Rotary is in precarious times, but we have been in the past—and not only did we survive, but we flourished. Membership must be addressed. It is critical to the survival of the organization. Young businessmen and women can afford Rotary if we adapt to the times that are the now! Must attract new members! We need Rotarians to look for new members and to propose new members and to help retain new members—Membership, Membership, Membership. Must keep the Annual Programs Fund up and active—it is important for the continuity of the organization.



**PRIP Charles Keller 1987-88 (Rotarians -- United in Service- Dedicated to Peace) -- bottom photo:** Rotary has changed and continues to change all the time—it started with one member and one club—and look at us now. We can change and we can adjust to change. What we have here is basically sound! But, we should find newer and better ways to accomplish our goals. Don't overlook any opportunity to re-evaluate where we have been and where we need to be in the future

Q and A's (Moderated by PRID Ron Beaubien (right):

*Do membership conferences work?* Wilf—you attract new members by asking people to join! It should be a continuing effort each and every day!



*What can we do to allow RAGs communicate with Rotarians and Rotary Clubs?* Answer: the problem lies within the Board—the RAGs have shown an increased degree of growth which needs to be controlled. The Board is concerned that RAGs are acting within the broad umbrella of Rotary. The Board fears that some of the RAGs are going to go in directions that the RI BOD don't know about, and this raises many unanswered questions. The Board has an obligation to maintain some controls/oversight. Since we are a conservative organization, we are slow in the uptake at times.

*People join forces, not organizations—is some of the potential of Rotary lying in the RAGs? Can RI past presidents promote these RAGs?* Don't select short-sighted Board members. Select Board members with a passion—with goals and dreams—who see what can be done by RAGS!! RAGs came from the fellowships and they do not detract from what Rotary and Rotarians were doing. There remains a passion that a RAG brings to its cause which cannot be denied! Currently, however, the Board is struggling with the whole concept of the RAGs.

## Plenary Session V

### *“Rotary’s Future: 2010-2011”*



Rotary International Presidential Nominee Kalyan Banerjee addressed nearly 130 attendees, following an introduction by PRID Julio Sorjus from Barcelona, Spain, his aide.

Kalyan began by stating that he and President Elect Ray Klingensmith both agree that the POR meeting should be moved to the Manchester Grand Hyatt, San Diego.

He welcomed all POR attendees to India and hopes we will visit his country soon!

Kalyan shared a few thoughts about Rotary’s future:

Polio is now restricted to two states in India and he believes that children are missing their oral vaccines. Also, people are moving about carrying their children, who may be affected, with them. Hopefully India will realize a successful end to polio by 2011.

Other Issues: What makes Rotary so special? What makes it different from other organizations? It shows no sign of redundancy or irrelevancy. No other organization focuses on ethics, vocational services and community services like Rotary! It is good for clubs to enhance ethical values within their communities. We *need* to share our ethical values to make society better; we must help with changing stagnant membership numbers. Membership growth can be encouraged through PR—get people to know about Rotary—what we do, how we do it, why we do it. We must tell the story of Rotary so lay people get to know us! Teach about our youth exchange, friendship exchange, etc. Encourage new membership and recognize those Rotarians who are successful at bringing in new members—do recognitions at Conventions, International Assemblies, etc. Encourage and foster Rotaract as an important youth organization. Encourage clubs to reduce their average club age by ONE year—not an easy task, but this would help with encouraging younger men and women to join. We might look at promoting the idea of “Family” memberships or “Corporate” types of membership.

We should be sharing ideas as to what works for membership throughout the entire Rotary world. We need quality members—and quantity of numbers must follow quality!! Let’s encourage the ‘best of the best’ to join Rotary! We are looking forward to the renaissance of Rotary!

Issues such as providing for clean water and eliminating food scarcity *must* be addressed by our organization. We *must* continue to be the harbingers of humanitarian service throughout the world! Peace is possible when we all come together. This is what we can and must do as Rotarians!

## Plenary Session VI

### *"Invitation to the Montreal Convention"*



PDG Karen Teichman gave a lively and enthusiastic PowerPoint tour of Montreal, the site of the 2009-2010 Rotary International Convention. Karen personally took many pictures that showcase the wonderful things Rotarians will see while strolling throughout the city. We were all encouraged to go back to our Districts and our Clubs to promote the Convention . No matter where you go in Montreal, you almost feel as though you are in Europe! There is much to see and do, and hotels and lodgings are available at many different price ranges. Shopping is plentiful and there are over 6000 restaurants within the city—something for every taste from around the world. Montreal is a very green city with many parks and gardens to enjoy . Question: did you know Montreal is an island? Make it a destination vacation for you and your entire family! Vive l'Amitié—Long Live Friendship! See you in Montreal!! Remember, the Convention runs from 20-23 June, 2010! [Ed. Note: cf flyer at the end of this publication for a promo for the Far West Reception during the Montreal Convention.]

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## Plenary Session VII

### *"New Strategies for Membership/Retention?"*



RID Thomas M. Thorfinnson presented an overview of RI's Strategic Plans.

RI's Mission Statement: to provide service to others, promote integrity and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders. There are three mission components: the first is to provide service; second is to promote integrity and the third is to advance peace.

#### RI's Vision:

RI and our clubs will be bigger, better, and bolder.  
The 'Rotary product' is attractive to prospective members.  
We differentiate ourselves from other service organizations.  
People join our 'cause' for what we can accomplish.  
Our service efforts strengthen Rotary's image.  
Change is happening; we need to become more dynamic and relevant as an organization.  
Collaboration = power.

We must remain relevant in today's world and to today's societies.

#### RI's Strategic Plan Priorities:

Focus on supporting and strengthening clubs  
Increase humanitarian impact with focused service opportunities

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# **HELP HAITI**

**Disaster Relief Rotarian Action Group**

This RAG, after due diligence, can help with:

- 1) Supporting district committees by providing relief and recovery projects (short term) for districts 4060 and 7020
- 2) Box Programs (eg, ShelterBox USA and water purification equipment and programs)
- 3) USA DDF/TRF Donations for rebuilding and for community development

For detailed information and online donation instructions, go to [www.DRRAG.ORG](http://www.DRRAG.ORG)

**PLEASE SHARE THIS APPEAL WITH YOUR CLUBS AND DISTRICTS**

For further information contact John J. Eberhard, Chairman DRRAG at:  
[eberhard@uwo.ca](mailto:eberhard@uwo.ca)

## Plenary Session IX

### *“The Next 100 Years”*



Trustee John F. Germ vice-chair of the Rotary Foundation Trustees (top photo), Trustee Louis Piconi (center) and Trustee David D. Morgan spoke about Rotary's next 100 years.

John asked, “what will our Foundation be in 100 years?”

There will be no other corporate program until Polio eradication is achieved.

Successful fund-raising in New York with Itzak Pearlman for Polio: raised over \$100,000.00.

There will be more collaborative projects in the future!

TRF will be reaching out to other corporate entities, other foundations and individual donors to join with us in our efforts to eradicate polio.

DDF—over 60% of the 100 million toward our goal is in cash, and we have funds in DDF accounts right now.



Fund Development: Lou stated that TRF is creatively exploring newer and different ways to successfully raise monies, hoping to lay groundwork for future fund-raising endeavors. Investing in and selecting more World Peace Scholars ultimately gives us an incredible opportunity for investing in tomorrow! Scholars are our future, the future of Rotary, the future of the world, he said. The Foundation, through our GSE teams, scholar programs and youth exchange, can cause peace to happen!!! Cooperatives will happen in the future—gifts like the Gates challenge grant will change the face of the world. All we need do is ask; that's all it takes to get gifts that can help to change the world!



Concerning the issue of oversight of our funds: David Morgan emphasized that we must have reliable means to provide fiduciary stewardship—even in Rotary there are a few dishonest people. Dishonesty, when identified, is acted upon immediately by RI staff. All allegations are reviewed and adjudicated. The Trustees deal with misappropriation severely because we are in the business of saving lives—and any money misappropriated is money not used for saving a life! There are over 300 Rotarians that check project sites around the world to ensure that our money is being used for the purposes intended. Allegations have steadily decreased since 2006—but we probably will never completely eliminate the misappropriation of funds. The Trustees will continue to work to make certain that the money is used to help the needs of the world!!

As of 31 December 2009, we are 2.1% ahead of last year in Foundation funds!

## Plenary Session VIII

### *“Future Visions--District and Global Grants Update”*



PDG Steve Brown, D5340, noted that we have had a system that was broken and that we were spending monetary resources in responding to smaller, short-term needs. As a result of this observation, a bifurcated system was created: district and global grants! We have not eliminated any programs, but rather realigned the funds for the future.

District grants: funding comes from Rotarians throughout the world. There is greater control and greater flexibility. Governors will be able to request up to 50% of DDF for short-term and innovative projects which help to build goodwill in the community. What can be accomplished using a district grant? It must be used to support the RI Foundation and the Foundation's mission! Types of activities include educational opportunities, humanitarian projects, etc. Districts will have much more oversight of the funds and the projects—coordination of service projects, administration of scholarship details, travel arrangements for scholars, identification of host counselors (if necessary)—all of these will be made at the District level now through District Leadership. Each District will be setting up their internal policies and procedures. Districts can become more innovative with the use of Foundation funds and the application process will be online and simplified. District grant reporting will be streamlined and simplified.

Global grants generally have a greater impact: sustainable outcomes, integrated activities and assessment of community needs. These will be large, grant-funded activities developed by Clubs and Districts.

[Ed. Note: Go to [http://www.rotary.org/RIdocuments/en\\_pdf/fv\\_grant\\_terms\\_conditions\\_en.pdf](http://www.rotary.org/RIdocuments/en_pdf/fv_grant_terms_conditions_en.pdf) for a complete overview of District and Global grants.]

Rotary Foundation District Grants and Rotary Foundation Global Grants support a wide variety of humanitarian and educational activities in local communities and abroad. All projects and activities funded by these grants must:

1. Relate to the mission of The Rotary Foundation.
2. Include the active participation of Rotarians.
3. Exclude any liability to The Rotary Foundation or Rotary International except for the funding amount of the grant.
4. Adhere to the governing laws of the United States and the country where the activity is taking place and not harm individuals or entities.
5. Only fund activities that have been reviewed and approved before their implementation. Grants will not be approved to reimburse clubs or districts for projects already completed or in progress. Planning for grant activities ahead of approval is allowed and encouraged, but expenses may not be incurred before approval.
6. Demonstrate sensitivity toward another country's/geographic area's tradition and culture if grant activities will take place outside of the grant recipient's country/geographic area.
7. Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 7.030 of The Rotary Foundation Code of Policies.

# **International Assembly Grand Opening Session**

**5:00 to 6:30 PM, Manchester Grand Hyatt Hotel San Diego**

[Ed. Note --The following article was copied directly from RI's home page/link posted after 6:30 p.m. Monday, January 18, 2010. For more articles and information, including theme graphics downloads, please go to the RI web site at [www.rotary.org](http://www.rotary.org) This was the first time POR participants were invited to attend the RIPE's theme address.]

## **Building Communities -- Bridging Continents**

is the 2010-11 RI theme --by Donna Polydoros of the RI Media Staff

**Rotary International News -- 18 January 2010**

After taking the stage to the tune of “California, Here I Come,” RI President-elect Ray Klinginsmith announced the 2010-11 RI theme, Building Communities -- Bridging Continents, during the opening plenary session of the 2010 International Assembly .

Klinginsmith said he arrived at the theme after reviewing RI themes of years past. He noticed that only a few [themes] spoke to non-Rotarians.

“As a result, I decided to search for a briefly stated theme that would fulfill two objectives: the first to explain Rotary to non-Rotarians, and the second to validate our work for Rotarians,” he said. “The words I have selected to describe Rotary’s current mission and to highlight our achievements are what we do best: Building Communities -- Bridging Continents.

The president-elect described how his 50 years of Rotary experience have contributed to his focus on communities at home and abroad. For example, as a Rotary Foundation Ambassadorial Scholar, he studied for a year in South Africa, becoming the first student from his small town of Unionville, Missouri, USA, to study abroad.

The timing of the theme announcement, which took place in the evening, was a break in tradition from past assemblies and a reflection of Klinginsmith’s willingness to embrace change. He encouraged district governors-elect to reexamine traditional procedures that were no longer best practices and to begin new traditions where appropriate.

He also paid homage to Rotarians of the past who helped raise Rotary to a place of prominence on the world stage. He urged district governors-elect to meet the past RI presidents and other former officers in attendance to deepen their connection to Rotary’s past.

“I love it,” says Governor-elect Robert Martin, of District 5020 (British Columbia, Canada; Washington, USA). “I’m going to be promoting Rotary pride in our district next year, and Building Communities -- Bridging Continents is something we can all be proud of.”



RI President-elect Ray Klinginsmith addresses district governors-elect at the 2010 International Assembly.



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Thank you for attending our Past Officers Reunion

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**PDG Tony Brockington & Ruth**



**PDG Fernando Favela & Lydia**

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**5 p.m. to 7p.m.**



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**[www.RotaryZones2526.org/events.html](http://www.RotaryZones2526.org/events.html)**

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Questions Contact: David G. Moyers, Event Chair Tel: 310-544-0400 DGMoyers2007-08@hotmail.com

