

**The Stockton Rotary Endowment Society of the  
Stockton Rotary Endowment**



## **The World War II Memorial Fund**

### **Preamble**

During the Rotary Year 2002-03 Rotary Club President, Robert Blower, requested the Stockton Rotary Endowment to participate with the Rotary Club of Stockton in the construction of a memorial at Weber's Point on property donated by the City of Stockton. The memorial incorporates individual engraved named bricks honoring those persons who served in the Army, Army Air Force, Navy, Marines, and Merchant Marine. Completed in 2009, 827 individual memorial bricks are present at the site.

### **The Memorial Fund**

The World War II Memorial Fund was established by the Stockton Rotary Endowment Trustees in May 2002 as a permanent endowment component of the Stockton Rotary Endowment with earnings from the component to be used for the maintenance, enhancement, or expansion of the World War II Memorial donated by the Rotary Club of Stockton and the Stockton Rotary Endowment to the City of Stockton at Weber's Point.

The Rotary Club of Stockton World War II Memorial Committee presents funding requests as required to the Stockton Rotary Endowment for the maintenance, enhancement, or expansion of the Memorial. In the absence of any requests from the Rotary Club of Stockton, the Stockton Rotary Endowment may at its own discretion expend component earnings to ensure that the World War II Memorial is well maintained, enhanced, or expanded.

Should the City of Stockton, another governmental agency, or any other non-Rotary organization assume responsibility for the maintenance, enhancement, or expansion of the World War II Memorial, or should the World War II Memorial be moved from its present site, the Stockton Rotary Endowment Trustees may at their discretion dissolve the World War II Memorial Fund component and transfer the corpus and any residual earnings to the General Charitable Component or any other Component within the Stockton Rotary Endowment.

Initial funding for the component was from the Rotary Club of Stockton and the Stockton Rotary Endowment. After the Memorial was erected funding from the sale of World War II Memorial bricks honoring individually named World War II veterans, direct donor contributions, and Rotary Club of Stockton donor specified recognitions established the endowed component.

# **The Stockton Rotary Endowment Society**

## **Preamble**

The Trustees of the Stockton Rotary Endowment established the Stockton Rotary Endowment Society in June 2006 to recognize and honor individuals who generously support the Endowment.

## **The Society**

The main purpose of the Society is to recognize Rotarians and non-Rotarians who contribute \$1,000.00 or more to the Stockton Rotary Endowment within the Endowment's fiscal year (July 1<sup>st</sup> to June 30<sup>th</sup>). Rotarians and non-Rotarians who meet the donation eligibility parameters will be known as "SRE Society Members".

## **The Endowment Fund Components**

Within the Stockton Rotary Endowment there are seven distinct components each with a specific focus. Each \$1,000.00 donation is placed into an Endowment Fund Component to signify the donors Endowment interest and will be noted on the donor's Award Certificate.

Endowment Fund Components are as follows:

1. The General Charity Fund
2. The Frank T. Smith Music Scholarship Fund
3. The Twenty Five Rotarian Community Service Scholarship Fund
4. The Lange Family Health, Hunger, and Clothing Fund
5. The Patmon Family Memorial Fund
6. The World War II Memorial Fund
7. The Woodward-Clark Library Fund

Eligibility And Procedural Parameters:

1. A minimum contribution of \$1,000 is required to be paid within a 12-month period by Rotarians and non-Rotarians. All contributions are designated to a specific Endowment Fund Component to signify the donors Endowment interest.
2. Rotarians and non-Rotarians who make multiple \$1,000.00 contributions may designate these funds to one or more endowment components in \$1,000.00 increments.
3. Society Membership will be recognized annually by the Endowment upon full payment of the contribution in a manner similar to the Rotary Foundation's Paul Harris Fellow award.

## **The Stockton Rotary Endowment General Charity Fund**

### **Preamble**

The General Fund was the initial component of the Stockton Rotary Endowment upon its establishment in 1982. The first contributions to the Endowment were made by Rotary Club of Stockton members in order fund future charitable needs within the Stockton Community as recommended by the Rotary Club of Stockton.

### **The General Charity Fund**

The General Fund is designed to fund charitable activities within Stockton and San Joaquin County without restriction as to the type of charitable need. The fund, with its flexibility, allows the Endowment to fund numerous local charitable organizational program needs.

Grants for office equipment acquisitions, charitable facility remodeling, installation of playground equipment and related facilities, children summer camp cost assistance for needy children, landscaping for charitable organizations are examples of past funding allocations.

The annual distribution of funds is made in accordance with the charitable allocation procedures set by the Stockton Rotary Endowment through the Rotary Club of Stockton Charitable Allocations Committee.

## **The Lange Family Health, Hunger, & Clothing Fund**

### **Preamble**

The Trustees of the Stockton Rotary Endowment established the Rotary Endowment Trustees Health, Hunger, & Clothing Fund in 1996 in order to provide a source of funds for the local charitable agencies to acquire medical supplies, food products, clothing and blankets to assist needy individuals residing in San Joaquin County. The Fund was renamed in honor of Rotarian William J. and Robinette Lange whose generous estate bequest greatly enhanced the value of the Health, Hunger, and Clothing Fund.

William J. Lange was the Secretary-Treasurer of the Rotary Club of Stockton 1980-1986 and Secretary of the Rotary Club of Stockton from 1986-1988 and a Past President of the Lodi Rotary Club.

### **The Fund**

The main focus of this fund is to assist Public and Private (Not-For Profit) charitable organizations assist needy individuals in San Joaquin County according to the parameters set by the Endowment Trustees. The earnings from the endowment component are to be used to grant awards to local charitable agencies to purchase medicine, medical supplies, immunization inoculations, food products, milk products, clothing and blankets to assist needy individuals residing within San Joaquin County. The Fund with its stated grant expenditure parameters specifically excludes any expenditure other than those specifically stated within the grant parameters.

The Stockton Rotary Endowment Trustees through the Rotary Club of Stockton Charitable Allocations Committee requests proposals from eligible charitable agencies for granting purposes.

# The Twenty-Five Rotarian Community Service Scholarship Fund

## Preamble

The Trustees of the Stockton Rotary Endowment established the High School Graduating Senior Community Service Scholarship Fund in 1993. The name of the Community Service Scholarship Fund was renamed The Twenty-Five Rotarian Community Service Scholarship Fund in 2006 to recognize, name, and permanently inscribe within the Component's History the "Twenty-Five Rotarians" who donated \$2,000.00 or more to increase the scholarship component fund balance.

## The Scholarship Fund

This award was established by the Stockton Rotary Endowment Trustees in 1993 as a permanent endowment component of the Stockton Rotary Endowment with the earnings from the component to be used as a scholarship award (or awards) to an outstanding graduating High School Senior who best exemplifies the traits established by Rotary International, that being:

1. High Ethical Standards;
2. Previous Dedicated Service to the High School of Graduation, and; Unselfish service to the Stockton Community through service and/or church organizations.

The award is to be presented annually to a graduating high school senior upon selection by a scholarship committee appointed by the Rotary Club of Stockton. The award is made without regard to financial need and requires that the recipient to have at least a 3.0 grade point average based on a 4.0 grade point average scale at the time of high school graduation.

The award is made in the second semester of attendance upon verification of enrollment in any accredited four-year college or university within the United States and the attainment of a 2.5 or better grade point average on a 4.0 grade point average scale at the end of the first semester of attendance. The award monies may only be used for tuition, institutional fees, or books.

## The Twenty-Five Rotarians

*Allison, Ron; Atwood, John; Barkett, Anthony; Blewett, Robert; Bowman, Herbert; Butterfield, Jerry; Curtin, Nicholas; Drake, Susan; Drury, Dale; Garabaldi, Shari; Gorham, Larry; Harless, Charlynn; Lange, William-Estate of; LaRue, John; McElhinnie, Scott; McHugh, Thomas; McNeilly, Dean; Monroe, Harold; Neri, Don; Patmon, Pat; Robinson, Kirby; Wary, Richard; Woodward, A. James; Wykoff, Victor; Zedlitz, Gerald O.*

## **The Woodward-Clark Library Fund**

### **Preamble**

The Trustees of the Stockton Rotary Endowment established the Woodward-Clark Library Fund in September 2004 in order to provide a source of funds for the purchase of children's library books. The Fund is named in honor of Jim and Axzine Woodward and in memory of Philip and Elisabeth Clark.

Jim Woodward faithfully served as Secretary of the Rotary Club of Stockton and of the Stockton Rotary Endowment for more than 18 years. Axzine Woodward taught in the primary grades for many years in Stockton area schools and elsewhere. Both Jim and Axzine have demonstrated a lifelong commitment to learning.

Philip Henry Clark and Elizabeth Barber Clark were the parents of Kathryn Clark Wary, wife of Rotarian Richard Wary. Philip H. Clark, a Naval Architect, and Elizabeth Barber Clark, a teacher in the primary grades and in Special Education, had a lifelong devotion in helping children.

### **The Fund**

The main focus of this fund is to assist public and private (Not-for profit) elementary schools and libraries within San Joaquin County for the acquisition of library books and/or other reading resource material that may materially enhance the reading skills of children from the kindergarten through sixth grade level. Charitable grants are made through the Rotary Club of Stockton Charitable Allocations Committee according to the parameters set within the Library Fund.

## **The Patmon Family Memorial Fund For Underprivileged Children**

### **Preamble**

The Trustees of the Stockton Rotary Endowment established The Patmon Family Memorial Fund for Underprivileged Children in 1997 at the request of the Patmon Family who provided the initial funding.

### **The Memorial Fund**

The focus of the fund is to assist financially non-tax supported (Not-for profit) charitable organizations that provide services to meet the physical, emotional, and educational needs of homeless children residing within San Joaquin County without regard to race or religious affiliation. All charitable allocations are designed to meet the intent and focus of this fund.

The annual distribution of funds is made in accordance with the charitable allocation procedures set by the Stockton Rotary Endowment through the Rotary Club of Stockton Charitable Allocations Committee.

## **The Frank Thornton Smith Music Scholarship Fund**

### **Preamble**

The Trustees of the Stockton Rotary Endowment established the Frank Thornton Smith Music Scholarship Fund at the time of the Endowment's founding in 1982.

### **The Scholarship Fund**

This fund was established with an estate bequest by Frank Thornton Smith, a noted Stockton Music Educator and Rotarian whose intent was to provide a scholarship fund to assist graduating local high school seniors and Delta College graduates who enroll in a four year accredited college or university as a music major.

Scholarship assistance is provided on a semi-annual basis to full-time students for tuition, class related fees, and books and is made directly to the financial aid office of the University attended. The second semester scholarship payment is contingent upon achieving a 2.5 grade point average based on a 4.0 grade point average scale and verification as a full-time student majoring in music.

The award is presented annually after selection by a musically competent scholarship committee appointed by the Rotary Club of Stockton. The award is made without regard to financial need.