

# The Voice of the Vineyards

The Weekly Electronic Bulletin of the Rotary Club of Healdsburg

“The mission of a bulletin is inform the membership,  
comfort the afflicted and afflict the comfortable”

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**July 12, 2021**

## WELCOME



Today is the first meeting of the Rotary year 2021-22, in person at The Clubhouse at Tayman Park.

## PLEDGE OF ALLEGIANCE

Co-President **Richard Norgrove** asked **Paul Sullivan** to lead the Pledge of Allegiance.



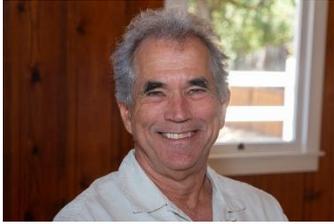
## VISITING ROTARIANS

- ✓ David Kittner (Oakland)
- ✓ Rollie Atkinson (Sebastopol)

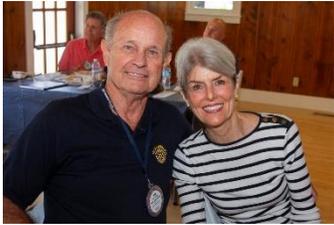
## GUESTS OF ROTARIANS

- **President Richard** welcomed his “younger” sister Diane and Darlene, both Kiwanians (and reminded them to turn off their phones, to prevent any accidental recording of Rotary proceedings.)





- **Cathy King** introduced Charlie Evans. (See announcement below)



- **John Hazlett** tipped his cap to his wife Carol.



- **John Hazlett** tipped to Tim and Michelle Regan.

- **Dick Bertapelle** introduced George Lawson.



- **Doug Garrett** introduced Mekey LePulu, Headmaster of Rio Linda Academy



- Janet Ziedrich (Eric's wife) was present for her fourth meeting. (Applause)

## ANNOUNCEMENTS

✚ **Cathy King** is passionate about international service projects. (Sidebar: She has participated in 6 and organized 3 projects, including building homes in Mexico; clean water, latrine and safe stoves in Guatemala; and public gardens and education in the Hopi Nation.) She introduced Dr. Charlie Evans who came to Sonoma County in 1982, and Healdsburg in 1985, working 30 years in ER – Dave Anderson was the attending physician.



○ In August, Charlie will be walking 170 miles across the Great Rift Valley in Kenya to raise funds for an orphanage in Ethiopia. The children's program in Ethiopia began organically in 1988, as a side project to the Lalmba Chiri Health Clinic, seeing 100 people a day, simply trying to help a small group of orphans from the HIV epidemic. (One of the success stories of the clinic was eradicating polio and TB in the area.) Since then, the Lalmba clinic expanded and another opened, and they serve 1,200 in Ethiopia at the HIV orphanage.

- Meanwhile, on July 29<sup>th</sup>, Charlie will host a reception at his West Dry Creek home to meet him and learn more about his walk/mission to raise funds for the orphanage, in August. Check your email for invitation. On September 20, Dr. Evans will return to our Rotary meeting to present a program on his journey and experience.
- More background: Lalmba hired staff to help care for the children, and tutors to help them catch up from years of being unschooled. As the children's program grew, the first Lalmba children grew up, went to college, and have since moved back to their community as leaders. There are so many success stories of destitute children overcoming insurmountable odds.

✚ PDG Bob Rogers reported in his weekly Polio Newsletter that he sent to President Richard and Foundation Chair Dick that there has been only two cases of the wild poliovirus this year, one in Afghanistan and one in Pakistan. Furthermore, it has now been over 6 months since that last case occurred in Afghanistan (January 1st). And on top of that, in another week, if no new cases show up in Pakistan, they will have also passed 6 months with no new cases, their last case occurring on January 27th. We have never seen numbers this low before for these two countries, But...As a reminder, both countries will have to go three years without a new case in order to be declared free of the wild poliovirus by the World Health Organization. So we have a ways to go, but we are off to a great start this year.

- ✚ District 5130 Conference is October 8<sup>th</sup> – 9<sup>th</sup> at Rohnert Park’s Doubletree Hotel. Rotarians kidded President Norgrove about a certain establishment in the vicinity, to which Richard understood there to be an “award winning brewery” nearby. Discounted room rates are available.

The speakers include Vicki Puliz 2021-2023 Rotary International Director Zones 26&27; and Summer Lewis, Rotary Peace Fellow, Class of 2012 and currently Partnership Coordinator, Rotary-Institute for Economics & Peace.

There will be presentations on Rotary Youth Exchange, Environment, Signature projects, Ethics in Business recap, and more!

District club award winners and the Rotarian of the Year will be announced.

New to this year’s conference will be a Q&A session, “Ask the DG.” This year’s DG Dustin will give a vision of what lies ahead for the new year.

Conference theme is BASEBALL, so everyone is encouraged to wear their favorite team jersey – Pro, College, and High School etc.

- ✚ In another email, from Nancy Dean, District’s Youth Exchange program, seeks hosts for 3 people. Deadline is August 7<sup>th</sup> to apply for travel abroad.
- ✚ Tuesday’s “Music on the Plaza” returned on 7/6. Our Rotary Club is sponsoring the music on 8/3, and our Club Service Director **Doug Garrett** will apprise us when to meet at our “gathering spot,” and whether a table will be provided for catered or member food.
- ✚ **Prez Richard** redeemed himself and avoided a fine for relating that the Sonoma County Association of Rotary Clubs (SCARC, not Scarce) dinner is scheduled for Thursday, July 29<sup>th</sup> and virtually sponsored by Sebastopol Sunrise Club.

## **BIRTHDAYS IN JULY**

- ✓ **Kate Buchanan** – July 4<sup>th</sup>
- ✓ **Brad Pender** – July 8<sup>th</sup>. \$37 to Paul Harris Fellow.



- ✓ **Graham Freeman** – July 13<sup>th</sup>, \$69 to club.



- ✓ **Prez Richard** ETC (email text called) **Mike McGuire**...no reply...so he left a message: “A vote was taken, and Mike owes \$50 to the club.”

### RECOGNITION – Happy/Sad Dollars

- ❖ **Emily Martin** offered \$50 to the club for an upcoming trip to the Midwest.



- ❖ For a 20<sup>th</sup> anniversary trip to Big Sur, **Doug Garrett** is putting \$50 to PHF.



- ❖ **Andy Elkind** and wife Kerry Weiner were delighted to be visited by their son Jordan (Columbus, Ohio) and their daughter Gavriel with her boyfriend (Boston, Massachusetts). \$50 to Paul Harris.

- ❖ **Mark Decker** and Peggy met up with Rand Dericco and will pay \$25 to the Club for his 24” 13lb salmon on the Rogue River, OR – he ATE the 13 pounder.



- ❖ George Lawson escapes to his cabin in upper WI, near Duluth, and willingly forked over \$50 to the Club – what a guy! President Richard hinted heavily about a “gift for the president.”

- ❖ **Dick Cochran** played a golf tournament in Tahoe and placed first in a tie with wives as opponents. There were 2 teams. \$50 to PHF.



- ❖ **Ric Helthal** confessed to missing 3 recent meetings and will miss 2 in August while cruising, so to clear his conscience, pays \$100 to PHF.

- ❖ **PP Dick Bertapelle** kept up with his 13-year-old granddaughter – walking, horseback riding, hiking, swimming, touring, cycling – and exhausted, agreed to pay \$25 to the club.

- ❖ **Richard Norgrove** has a “thing” for dogs, and his Maltese has graduated from obedience school by learning to sit, lay down, stay (the hardest), and eat from his hand (easiest). Thusly, \$40 to the scholarship fund.



## NEW MEMBER INDUCTION

Membership Chairman **Tricia Fichtner** and sponsor **John Hazlett** inducted his neighbor **Tim Regan**, retired physician at Kaiser Permanente, with his wife Michelle at his side. Members were invited to welcome /shake hands with our newest member and first of this Rotary year.



## PROGRAM: Craft Talks by Jerry Ogden and Paul Sullivan

**Jerry Ogden**



Twenty years ago, Jerry gave his first craft talk, with lawyer and trainer consultant Sunny Yates (who is DG in NM now). “If I knew I would live this long, I would have taken better care of myself.” Sophie Tucker. Thank you, Dr. Dave!

Always entertaining, Jerry regaled us about interesting encounters (with Mary Travers, Ronald Reagan, Bill Russell, Chris Webber, Al Atlas, Mike Krukow,

Vida Blue, Maury Wills, and most impressive Willie Mays in a Scottsdale restaurant) – and by far the most *awkward* 15 minutes of his life, was his encounter with Joe DiMaggio in a steam room of a Modesto sports club.

An important life-changing event – First day of 5<sup>th</sup> grade in 1949, sitting next to (Mr) Jan Nelson who would become a life-time friend. Born (and stayed) in Oakland in 1940, except 2 years in southern CA. His Dad was in the casket business. When his mom passed in 1962, Jerry was Executor of her estate, sold their home, and moved in with the Nelsons in Modesto, and worked at their feed and hardware store until he entered the Army, after graduating from San Jose State in 1963.

Some other life changers – In January 1964 on a 48-hour pass from Fort Ord, Alison and he were married that evening in Oakland. His base pay was about \$90; they rented an apartment in Salinas for \$105, and somehow, they made money. Alison completed her student teaching in Oakland and taught at Salinas Elementary School. His Dad had open heart surgery that year too. Jerry worked a succession of interesting jobs in Education. Upon his discharge from the Army in 1965, he was a cost accountant for General Foods at the vegetable processing plant. Two weeks later, his job application was accepted at a better job with the County Auditor-Controller; and 3 years later, Jerry applied for a job with Modesto City Schools as a Business Assistant to the Principal at Grace Davis High School. Ten years thereafter, legislation co-authored by Howard Jarvis changed school budgets, and his position was eliminated. Jerry owned his own business for a short stint, before returning to Modesto City Schools as an accountant. Some months later, he pursued a lead at the Manteca Unified School District, had coffee with the Chief Business Officer and after an interview, was offered the job as Director of Business Service, as the #2 person until 1991. Then he was appointed Assistant Superintendent - Business Services until he retired in 2000.

As Director of Business Service, Jerry’s responsibilities included financial oversight, risk management, post retirement fund management, facilities planning and maintenance, new school financing/construction/litigation/collective bargaining, and School Board interaction. Prior to his appointment to Assistant Superintendent, he became the district witness during the prosecution

of a long-suspected Accounts Payable Supervisor for embezzling over \$600,000. HOWEVER, the court was unsuccessful in recovering any of that stash, the IRS did not pursue her for back taxes and her sentence was 2 years at a facility 15 minutes from her home...proving crime DOES pay.

As Assistant Superintendent, Jerry's major focus was school construction. There was constant media coverage of MUSD by 5 newspapers and 4 TV stations, and Board meetings were taped and aired later on cable TV. The district was highly successful, building 7 schools in 8 ½ years. Sidebar: Thanks to Kent Mitchell's arm twisting, Jerry became Treasurer for a school bond campaign, a member of the Healthcare Foundation and on the Finance Committee for the HEF. He was first in Rotary in Manteca over 30 years ago and was Treasurer there. Here, he joined Healdsburg Rotary Club in 2000, and while a Red Badger became Treasurer with Dorothy Trujillo married to Ron Rodella. As President 2005-06, he attended the Centennial RI Convention in Chicago, and takes pride in the robust funding of scholarships, and leaving behind "the painted wall" on Powell Avenue and the Day Labor Center. Oh, and restarting the Thanksgiving Luncheon for seniors with Evelyn Cheatham's Worth Our Weight program. (Such an underachiever!)

Following knee surgery, Jerry realized that handball, adult league softball and basketball were "out." But he turned to jogging, which started his interest in organized runs, which prompted his commitment to marathons – at one, the crowd was deep, trying to glimpse MVP Jim Plunkett. The runs that Jerry organized included crossings of the Bay Bridge and the San Mateo Bridge.

Segue to Jerry's extensive sports interests:

- Baseball: 18 MLB stadiums, plus Hall of Fame visits.
  - 1<sup>st</sup> and last Giants' games played at Candlestick – 1960 and 1969.
  - 2<sup>nd</sup> game played at Pac Bell. All-Star Game. World Series games.
- Football: 49er season tickets at Kezar Stadium. 6 games for \$28. Last home game for Joe Montana as a 49er at Candlestick Park. (Sad moment)
  - Rose Bowl 1959 - last time Cal appeared, losing to Iowa.
- Basketball: Cal 1959 National Champions, beating West Virginia 71-70! (Really?!)

"That's my story, and I'm sticking to it."

**Paul Sullivan**



**Paul** was born to a musical family of 13, learning flexibility and humility, and passed through careers in the automobile, diamond, and moving & storage businesses, and was a professional musician (both performing in and promoting events), before his career as a Financial Advisor. He graduated from St. Mary's College in Morago with a bachelor's degree in Business Management & Leadership.

Paul explained how HE changed from his start at Edward Jones as a salesman and how the financial services industry changed over his 21 years in that industry.

In his early experience, he set the groundwork to create velocity in sales contracts with customers by shaking hands, coaching, volunteering in the community, joining Rotary for 20 years and meeting locals and making friends. He became aware of the larger scope and responsibility of the Financial Advisor to assist his clients with important decisions and transitions of life. And he decided to increase his knowledge and experience, and education by earning a Certified Financial Planning (CFP) designation, and Master of Science Degree with curriculum of Estate Planning, Tax Planning, Portfolio and Investment Planning, Retirement Planning, and Insurance at the College for Financial Planning.

Later on, there came a “suitability” standard whereby advisors were mandated to know their customers and make only investment recommendations that fit their personal lifestyle, needs, and family and retirement goals – based on documentation and balance sheets. After the 2007-08 financial crisis/recession, The Obama Administration put the financial industry on notice through the Department of Labor, to adhere to a higher fiduciary standard. By 2015, Financial planning would be based on putting the client's needs first, above the advisor's and the brokerage firm for which the advisor works. Unfortunately, the DOL Fiduciary Rule was shot down by 2-1 vote on March 15, 2018 in the Fifth Circuit Court of Appeals in New Orleans. Inspired, the Securities and Exchange Commission (SEC) implemented the Best Interest Regulation (Reg BI) by late 2019 and by June 2020, brokerage firms and financial advisors must present strong rational for making an investment recommendation based on client circumstances and suitability for their financial planning.

Paul has evolved as has the financial industry in which his career is.

## **CLOSING REMARKS**

**President Richard** thanked each guest and visiting Rotarian for coming and complimented those in the attendance for being such a dynamic and diverse group – certainly over Kiwanis. (teehee)

**Next Program:** Club Assembly, with the returning Co-President **Barbara Rosen**.