

# Plattsburgh Sunrise Rotary Board Meeting Agenda

6/10/2025 7:30am ZOOM

## **In attendance;**

**Call to order;** Sue

**Secretary report;**

**Treasurer's report;**

-2025-2026 Budget approval

-CD renewal

**Member engagement;**

-Which members have not participated in meetings, events, etc

**Old Business**

- Mayor's Cup update; Colleen & Wanda

-Volunteers needed for M. C.

- Help needed in sponsorship outreach

- Michigan Fest (Noon Rotary's event) 8/2/2025. Would we want to participate?

- Ted K project; Jim

**New Business**

-We need to update meeting information on Club runner

- Create goal for 2025-2026

-The 6 road signs that enter Plattsburgh, do not have our current meeting info on them

- Cleanup preparation for MC

**Adjournment**

**Plattsburgh Sunrise Rotary  
Treasurer's Report  
May 31, 2025**

**Assets**

Cash on Hand (Change for Raffle/Foodshelf)	\$	100.00
Checking Account - Community Bank	\$	26,949.80
Savings Account - Community Bank*	\$	27,467.26
CBNA CD	\$	5,233.08
CBNA CD	\$	10,466.16
CBNA CD	\$	15,699.24
<b>Total Checking, Savings &amp; CD's</b>	<b>\$</b>	<b>85,915.54</b>

**Total Assets** **\$ 85,915.54**

**Liabilities**

50/50 Raffle 5/31/2025	\$	155.00
Accounts Payable	\$	-
Paul Harris Fellow Award - Community Member	\$	1,500.00
Food Shelf Donations	\$	240.00
Plattsburgh City Beach Wheelchair Project	\$	173.22
Member Dues Prepayment	\$	170.00

**Total Liabilities** **\$ 2,238.22**

\*Community Bank includes \$3000 for the Pavilion Project

**Plattsburgh Sunrise Rotary  
Treasurer's Report  
May 31, 2025**

**Expenses since April 30, 2025 Report**

<b>Easy Self Storage</b>	<b>\$</b>	<b>90.00</b>
<b>Ck#1345 Russell Hampton - Membership Folders</b>	<b>\$</b>	<b>120.50</b>

<b>Annual Membership Dues</b>	
<b>Members Billed</b>	<b>34</b>
<b>Members Paid</b>	<b>34</b>
<b>% Collected thru 5/31/2025</b>	<b>100%</b>

**SUNRISE ROTARY**  
**Budget vs Actual**  
**2024-2025**

	2024-2025	2024-2025	2024-2025
	Final Budget	Mayor's Cup	Actual YTD
	Jul'24 - Jun'25	Jul'24 - Jun'25	Jul'24 - May'25
<b>Income</b>			
4000 · Member dues	\$5,280	\$5,040	\$5,040
4010 · Mayor's Cup	\$20,000	\$21,083	\$16,787
4020 · Gingerbread Fundraiser	\$0	\$168	\$168
4022 · Vintage Pop Up Sale Fundraiser	\$0	\$1,204	\$1,204
4024 · Super Bowl Squares	\$1,500	\$1,575	\$1,575
4028 · Community Sale Fundraiser	\$3,500	\$3,950	\$3,950
4026 · Fundraiser/Donations	\$750	\$0	\$0
4036 · Polio Fundraiser	\$0	\$20	\$20
4026 · Donations	\$0	\$90	\$90
4040 · 50/50 Raffle, Fines	\$300	\$96	\$96
4045 · Annual Dinner/Holiday Party	\$0	\$0	\$0
4100 · Interest income	\$1,200	\$1,304	\$1,304
<b>Total Income</b>	<b>\$32,530</b>	<b>\$34,530</b>	<b>\$30,233</b>
<b>Expense</b>			
4050 · Holiday Party/Annual Dinner	\$500	\$108	\$108
4060 · Paul Harris Award	\$1,540	\$0	\$0
4800 · Large Charitable Donations	\$5,000	\$2,200	\$2,200
5000 · Charitable donations & projects	\$4,000	\$2,979	\$2,979
4037 · Community Support (Parades)	\$750	\$0	\$0
5001A · Soup Kitchen/Foodshelf	\$500	\$0	\$0
5002 · Membership Committee	\$250	\$175	\$175
5003A · Polio Donation	\$100	\$563	\$563
5003B · Environmental Committee	\$550	\$0	\$0
5003C · Foundation Committee	\$150	\$0	\$0
5005 · International Service Donations	\$5,000	\$4,500	\$4,500
5006 · Mayor's Cup Expense	\$9,800	\$5,432	\$4,986
5007 · Youth Services	\$500	\$0	\$0
5009 · Roteract - SUNY Plattsburgh	\$500	\$111	\$111
5010 · Dues	\$4,825	\$4,827	\$4,827
5011 · RYLA	\$250	\$0	\$0
5012 · Meeting Expense	\$500	\$335	\$335
5015 · Miscellaneous	\$500	\$41	\$41
5023 · Bank Service Charges	\$75	\$102	\$102
5025 · Conference expense	\$600	\$0	\$0
5030 · Supplies	\$250	\$0	\$0
5031 · Storage Expense	\$1,200	\$990	\$990
5040 · Postage	\$250	\$200	\$200
5045 · Website	\$850	\$751	\$751
<b>Total Expense</b>	<b>\$38,440</b>	<b>\$23,315</b>	<b>\$22,870</b>
<b>Net Income</b>	<b>-\$5,910</b>	<b>\$11,214</b>	<b>\$7,363</b>

# Profit and Loss

## Plattsburgh Sunrise Rotary Club

Date Range: Jul 01, 2024 to May 31, 2025

Report Type: Accrual (Paid & Unpaid)

**Jul 01, 2024  
to May 31, 2025**

### ACCOUNTS

<b>Income</b>	
Cache Elegant Donations	\$90.00
Community Sale	\$3,950.00
Donations, 50/50, Happy \$\$	\$96.00
Gingerbread Fundraiser	\$168.08
Interest Income	\$1,303.66
Mayor's Cup	\$16,706.58
Mayor's Cup - T-Shirt Sales	\$80.00
Member Dues	\$5,040.00
Polio Fundraiser	\$20.00
Super Bowl Squares	\$1,575.00
Vintage Pop Up Sale	\$1,204.00
<b>Total Income</b>	<b>\$30,233.32</b>
<b>Total Cost of Goods Sold</b>	
	<b>\$0.00</b>
<b>Gross Profit</b>	
As a percentage of Total Income	<b>\$30,233.32</b> <b>100.00%</b>

<b>Operating Expenses</b>	
Annual Dues	\$4,827.18
Bank Service Charges	\$102.17
Charitable Donations & Projects	\$2,979.38
Holiday Event	\$108.00
International Service Donations	\$4,500.00
Large Donation Expense	\$2,200.00
Mayor's Cup Expense	\$4,986.49
Meeting Expenses	\$335.34
Membership Committee	\$175.25
Miscellaneous Expenses	\$40.86
Postage	\$200.00
Rotary Foundation Polio Donation	\$563.00
Roteract - SUNY Plattsburgh	\$111.48
Storage Expense	\$990.00
Website Expenses	\$750.92
<b>Total Operating Expenses</b>	<b>\$22,870.07</b>
<b>Net Profit</b>	
<b>As a percentage of Total Income</b>	<b>\$7,363.25</b> <b>24.35%</b>

# Balance Sheet

## Plattsburgh Sunrise Rotary Club

As of May 31, 2025

Report Type: Accrual (Paid & Unpaid)

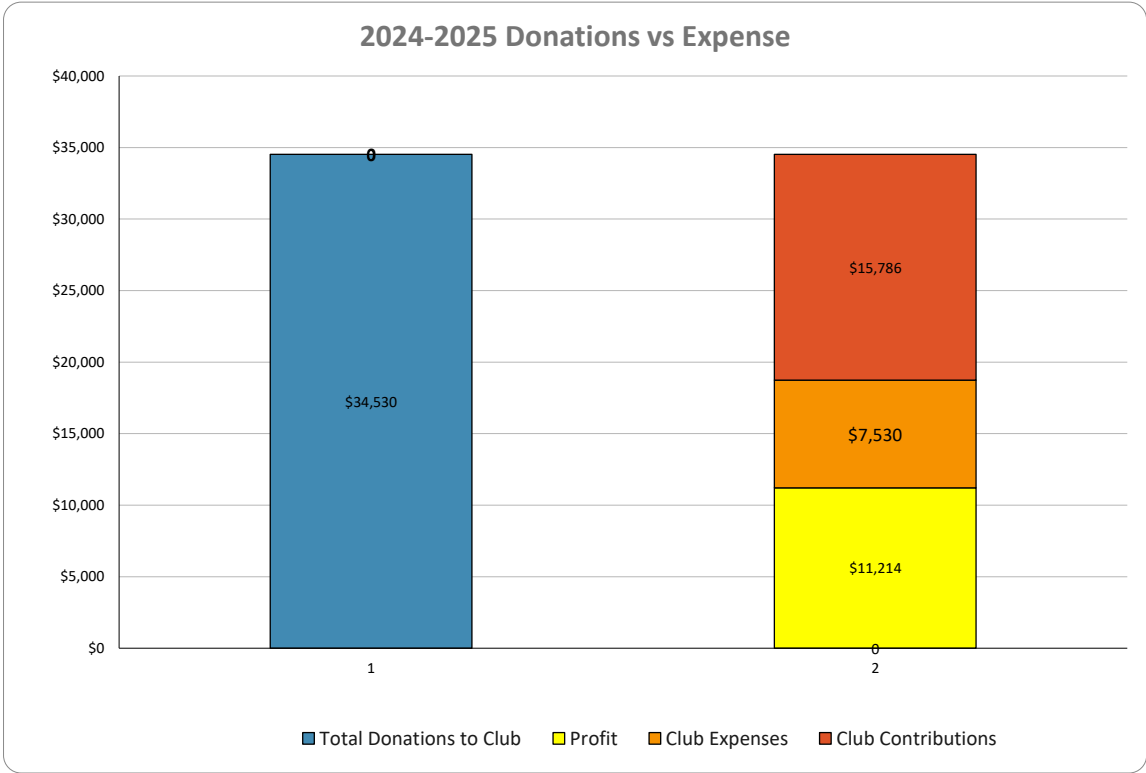
ACCOUNTS	May 31, 2025
<b>Assets</b>	
<b>Cash and Bank</b>	
CBNA CD (\$10K)	\$10,466.16
CBNA CD (\$15K)	\$15,699.24
CBNA CD (\$5K)	\$5,233.08
Community Bank Checking	\$26,949.80
Community Bank Savings	\$27,467.26
Petty Cash	\$100.00
<b>Total Cash and Bank</b>	<b>\$85,915.54</b>
<b>Other Current Assets</b>	
<b>Total Other Current Assets</b>	<b>\$0.00</b>
<b>Long-term Assets</b>	
<b>Total Long-term Assets</b>	<b>\$0.00</b>
<b>Total Assets</b>	<b>\$85,915.54</b>

<b>Liabilities</b>	
<b>Current Liabilities</b>	
50/50 Raffle	\$155.00
Food Shelf Donations	\$240.00
Member Dues Prepayment	\$170.00
Paul Harris Award Community	\$1,500.00
Plattsburgh City Beach Wheelchair Project	\$173.22

<b>Liabilities</b>	
<b>Total Current Liabilities</b>	<b>\$2,238.22</b>
<b>Long-term Liabilities</b>	
<b>Total Long-term Liabilities</b>	<b>\$0.00</b>
<b>Total Liabilities</b>	<b>\$2,238.22</b>

<b>Equity</b>	
<b>Retained Earnings</b>	
Profit for all prior years	\$76,314.07
Profit between Jul 1, 2024 and May 31, 2025	\$7,363.25
<b>Total Retained Earnings</b>	<b>\$83,677.32</b>
<b>Total Equity</b>	<b>\$83,677.32</b>

Total Donations to Club	\$34,530	
Contingency Fund	\$0	
Profit	\$11,214	
Club Expenses	\$7,530	
Club Contributions	\$15,786	
	<hr/>	
	\$34,530	\$34,530



# Engagement Update – May 2025 Attendance below 50%

April & May 2025 (6 meetings)

- Allison Hulbert-Bruce — 17%
- Nadine Karam — 17%
- Colleen Lemza (on leave) — 0%
- Thom Loreman – 0%
- Joan Sterling - 17%

There was no Membership Committee meeting in May.

The Membership Committee reviewed the member application of Nicole Brown of Key Bank and determined via email that her name should be forwarded to the board for approval for full membership pending assignment of a mentor and sufficient progress in the recommended pre-membership steps.

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**Re: Rotary - Membership Request Form - Nicole Brown**

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Nicole Brown &lt;noreply@jotform.com&gt;

Tue, Jun 3, 2025 at 11:32 AM

Reply-To: nicole\_m\_brown@keybank.com

To: scoopnorth@gmail.com, jeff@valleyvending.com, randyg@northerninsuring.com, eric@ufirstfcu.net

 **Rotary - Membership Request Form**

Name	Nicole Brown
Email	<a href="mailto:nicole_m_brown@keybank.com">nicole_m_brown@keybank.com</a>
Preferred Phone Number	(518) 570-7778
Address	Street Address: <a href="#">13 Downs Way</a> City: <a href="#">Plattsburgh</a> State / Province: NY Postal / Zip Code: 12901

Check this box if you are a past member of a Rotary club

If you checked either option above, please elaborate on your past involvement with Rotary.

Corp noon rotary member

Tell us about yourself. Please provide a brief biography to allow us to learn some more about you. Details may include: your work experience, where you were raised, educational and family background, your hobbies and more.

I am a born Plattsburgh native. I was born and raised in the Peru area and attended Peru CSD. I was attending CCC, studying, Business Admin, when I got pregnant for my daughter who will be 20 in July. I joined the banking industry in 2001, at the age of 19. I have now been in this industry for 24 years, working at KeyBank for my entire banking career. In my tenure I have held several positions, teller, banker, client service manager and manager. I have recently taken the next set in my career, by taking on a manager role of a branch that is 2X the size of my previous office. My passion really is people!!! I love to build relationships with my clients and help them thrive financially! I am married to my high school best friend, and we have 2 beautiful children. Lexi will be 20 in July and Luke will be 4 in September (I like to tell people that my husband is crazy, wanting a 2nd child 16 years later LOL). Family is what is most important to me.

Tell us more about your interests and what you hope to accomplish by joining our club.

My hopes with joining the club would be to connect with members of the community and give back. I have previously been a member of the board at the Salvation Army of Plattsburgh and enjoyed the time I was able to give there. I am also the president of the local ADK Gymnastics Booster Club, assisting in planning local meets and activities for our home team. I look forward to being a part of this community and bringing KEYBANK back to life as an active member of Clinton County.

Required

I consent to the collection, storage, and use of my information as described in this Privacy Policy. I

## **Sunrise Rotary Club of Plattsburgh**

### **Community Grant Application**

SUMMARY: This document aims to improve our Club's decision-making for community giving. Providing clear and detailed information will help us choose projects that align with Rotary's values, brand, and reputation, while also benefiting the community. With structured guidelines, Sunrise Rotary can better support those in need and gain more recognition and support.

#### **IMPLEMENTATION PLAN**

1. Finance survey results in relation to creating a process – Meeting 1 (Club)
  - Group discussion – narrow down categories
  - Small donations
  - Large donations
  - Assign project champions
2. Prepare and complete project documentation
3. Present projects to board – Meeting 2 (Board/Champions)
4. Present projects to full club – Meeting 3 (Champions/Requester)
5. Club vote (email)
6. Congratulate project champions and requester (email)
7. Share feedback on why some projects are not selected (email/follow up)

TIMELINE:

May-June: Review/finalize document project documents and timeline and club rollout

June-July: Project Champions prepare/review documents with requester

August: Project presentations

August-Sept: Grant awards/marketing

## **COMMUNITY PROJECT FUNDING PROPOSAL**

### **1. PROJECT OVERVIEW**

**Project Title:** *[Provide a concise, descriptive title for your project]*

**Rotary Member Project Champion:** *[Your name]*

### **2. PROJECT OVERSIGHT**

**Is this a Rotary-led project (example, beautification) YES  NO**

**If no, is this a one-time donation with any Rotary participation or oversight? YES  NO**

### **3. Donation Recipient**

**Organization Name:** Click or tap here to enter text.

**Organization Address:** Click or tap here to enter text.

**Primary Contact Information:**

- Name: Click or tap here to enter text.
- Email or phone Click or tap here to enter text.

**Amount Requested:** Click or tap here to enter text.

**Project Duration:**

- Start Date:
- End Date:

### **2. EXECUTIVE SUMMARY**

*[Provide a concise summary (150-200 words) of your project, including its purpose, key activities, and expected outcomes. This should give readers a quick understanding of what you're proposing.]*

Click or tap here to enter text.

### **3. COMMUNITY NEED**

**Problem Statement:** *Clearly define the specific community problem or need your project addresses.*

**Target Population:** *Describe who will benefit from this project, including the population served, whether the project is intended to fulfill an unmet need or draw people to a currently underutilized program or location.*

**Community Impact:**

*How will the surrounding community or visitors respond to the project both positively and anticipated potential concerns.*

### **4. PROJECT DESCRIPTION**

**Project Activities:**

*Provide a general description of the activities that will be carried out to achieve your objectives and. Include timeline information if appropriate.*

### **5. PROJECT TEAM**

**Partner Organizations:** *List any partners if applicable.*

### **6. EXPECTED OUTCOMES**

**Impact Measures:**

*How will you measure the success of your project? What metrics will you track?*

**Short-term Outcomes:**

*What changes do you expect to see immediately after project completion?*

**Long-term Impact:**

*What lasting effects will this project have on the community?*

### **7. BUDGET**

**Total Project Cost:** *Total amount*

**Amount Requested from Sunrise Rotary Club of Plattsburgh:** *Amount*

**Other Funding Sources:** *List other confirmed or potential funding sources and amounts*

**Detailed Budget Breakdown:**

Item Category	Description	Amount	Justification
Personnel		\$	
Equipment		\$	
Materials		\$	
Services		\$	
Other		\$	
<b>TOTAL</b>		\$	

### 8. SUSTAINABILITY PLAN

*Explain how the project will be sustained after the funding period ends. How will ongoing costs be covered? Will the project continue or evolve?*

#### What is needed to sustain the project:

Click or tap here to enter text.

#### Potential concerns about sustainability:

Click or tap here to enter text.

### 9. RISK ASSESSMENT

*[Identify potential risks to project success and describe mitigation strategies.]*

Risk	Mitigation Strategy

### 10. ATTACHMENTS

\_[List any supporting documents you're including with your proposal, such as:

- Photos
- Maps
- Project Estimates
- Recipient Organization brochure or overview

### 11. CERTIFICATION

I certify that the information contained in this proposal is accurate and complete to the best of my knowledge.

**Champion:** Name **Date:** \_\_\_\_\_

**Organization Signature:** Name **Date:** \_\_\_\_\_

## REVIEW COMMITTEE USE ONLY

### Board Review

Date:

Follow up notes/modifications Click or tap here to enter text.

Approve to move forward: **YES**  **NO**

Board Sign Off: Name

### Club Review:

Date:

Follow up notes/modifications: Click or tap here to enter text.

Final Approval: **YES**  **NO**

Date

*The follow up dates are intended to determine if the project is moving ahead and whether the project appears successful/on track. The Rotary project champion may opt to bring in a project/organization participant or share feedback themselves. This will help our club determine viability and effectiveness for future projects.*

6 Month Follow Up

12 Month Follow Up

# Plattsburgh Sunrise Rotary Board Meeting Agenda

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**Treasurer's report;**

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**Plattsburgh Sunrise Rotary  
Treasurer's Report  
May 31, 2025**

**Expenses since April 30, 2025 Report**

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**SUNRISE ROTARY**  
**Budget vs Actual**  
**2024-2025**

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# Profit and Loss

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As a percentage of Total Income	24.35%

# Balance Sheet

## Plattsburgh Sunrise Rotary Club

As of May 31, 2025

Report Type: Accrual (Paid & Unpaid)

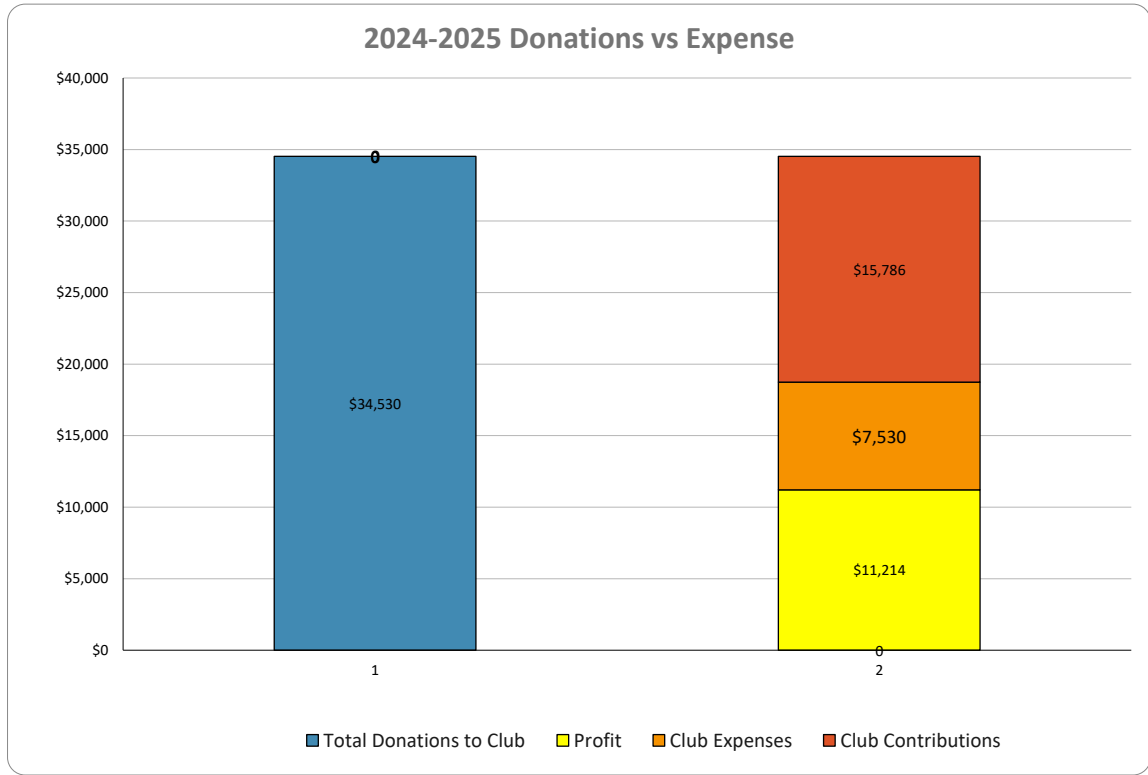
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<b>Long-term Assets</b>	
<b>Total Long-term Assets</b>	<b>\$0.00</b>
<b>Total Assets</b>	<b>\$85,915.54</b>

<b>Liabilities</b>	
<b>Current Liabilities</b>	
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Food Shelf Donations	\$240.00
Member Dues Prepayment	\$170.00
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<b>Long-term Liabilities</b>	
<b>Total Long-term Liabilities</b>	<b>\$0.00</b>
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<b>Equity</b>	
<b>Retained Earnings</b>	
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Profit between Jul 1, 2024 and May 31, 2025	\$7,363.25
<b>Total Retained Earnings</b>	<b>\$83,677.32</b>
<b>Total Equity</b>	<b>\$83,677.32</b>

Total Donations to Club	\$34,530	
Contingency Fund	\$0	
Profit	\$11,214	
Club Expenses	\$7,530	
Club Contributions	\$15,786	
	<hr/>	
	\$34,530	\$34,530



# Engagement Update – May 2025 Attendance below 50%

April & May 2025 (6 meetings)

- Allison Hulbert-Bruce — 17%
- Nadine Karam — 17%
- Colleen Lemza (on leave) — 0%
- Thom Loreman – 0%
- Joan Sterling - 17%

There was no Membership Committee meeting in May.

The Membership Committee reviewed the member application of Nicole Brown of Key Bank and determined via email that her name should be forwarded to the board for approval for full membership pending assignment of a mentor and sufficient progress in the recommended pre-membership steps.

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**Re: Rotary - Membership Request Form - Nicole Brown**

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Nicole Brown &lt;noreply@jotform.com&gt;

Tue, Jun 3, 2025 at 11:32 AM

Reply-To: nicole\_m\_brown@keybank.com

To: scoopnorth@gmail.com, jeff@valleyvending.com, randyg@northerninsuring.com, eric@ufirstfcu.net

 **Rotary - Membership Request Form**

Name Nicole Brown

Email [nicole\\_m\\_brown@keybank.com](mailto:nicole_m_brown@keybank.com)

Preferred Phone Number (518) 570-7778

Address Street Address: [13 Downs Way](#)  
City: [Plattsburgh](#)  
State / Province: NY  
Postal / Zip Code: 12901

Check this box if you are a past member of a Rotary club

If you checked either option above, please elaborate on your past involvement with Rotary.

Corp noon rotary member

Tell us about yourself. Please provide a brief biography to allow us to learn some more about you. Details may include: your work experience, where you were raised, educational and family background, your hobbies and more.

I am a born Plattsburgh native. I was born and raised in the Peru area and attended Peru CSD. I was attending CCC, studying, Business Admin, when I got pregnant for my daughter who will be 20 in July. I joined the banking industry in 2001, at the age of 19. I have now been in this industry for 24 years, working at KeyBank for my entire banking career. In my tenure I have held several positions, teller, banker, client service manager and manager. I have recently taken the next set in my career, by taking on a manager role of a branch that is 2X the size of my previous office. My passion really is people!!! I love to build relationships with my clients and help them thrive financially! I am married to my high school best friend, and we have 2 beautiful children. Lexi will be 20 in July and Luke will be 4 in September (I like to tell people that my husband is crazy, wanting a 2nd child 16 years later LOL). Family is what is most important to me.

Tell us more about your interests and what you hope to accomplish by joining our club.

My hopes with joining the club would be to connect with members of the community and give back. I have previously been a member of the board at the Salvation Army of Plattsburgh and enjoyed the time I was able to give there. I am also the president of the local ADK Gymnastics Booster Club, assisting in planning local meets and activities for our home team. I look forward to being a part of this community and bringing KEYBANK back to life as an active member of Clinton County.

Required

I consent to the collection, storage, and use of my information as described in this Privacy Policy. I

# Calendar

June 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
YEX Farewell Weekend						District Council
						St. Lawrence County Dairy Festival Parade (Potsdam)
8	9	10	11	12	13	14
Young People of Character Awards (Orleans)		District Membership meeting	Potsdam Rotary Pres. Changeover & Awards Dinner 2025 (Potsdam)			YEX Annual Committee Meeting
		JPIC Dinner & Meeting (Seaway West) (Kingston-Frontenac)	Board of Directors Meeting (Ottawa)			Comedy Night (Cornwall Sunrise)
15	16	17	18	19	20	21
			K-F Domino Theatre Night Fundraiser (Kingston-Frontenac)			RI Convention Calgary
22	23	24	25	26	27	28
RI Convention Calgary						
	Club on-line meeting (Ottawa)	District 7040 Calgary Convention Dinner				
29	30	1	2	3	4	5
6	7	8	9	10	11	12
		District Membership meeting				Rubber Ducky Pluck 2025 (Potsdam)
						DG Changeover 2025- Changement de PD

- Board Meeting Event

- Committee Meeting

- Fundraiser

- Club Event

- Deadline

- General

- Club Meeting

- District Event

- Official DG Visit

# Calendar

June 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 Zones 28/32 membership meeting	3	4	5 DEI Quarterly Meeting	6	7
8	9	10 Business Networking Breakfast (In-person) (District 7910)	11 Monthly Zone Leadership Team Meeting	12	13	14
15	16	17	18	19	20	21 Rotary International Convention 2025-Calgary
22	23	24	25	26	27	28
Rotary International Convention 2025-Calgary						
	Beyond Borders Calgary					
	Beyond Borders Dinner					
	Monthly District Governor Nominees meeting					
29	30	1	2	3	4	5
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- General

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