



History of the Rotary Club of Morgan Hill Endowment and the Don Emley Fellow

by Craig C. van Keulen

Past President, Don Emley (1986), founded the Rotary Club of Morgan Hill Endowment (“the Endowment”) in 1992. His vision, humor, and persistence resulted in the formation of the Endowment which has become an important legacy supporting the benevolent nature of the Rotary Club of Morgan Hill (“Club”) and its philanthropy in our community, now and into the future.

About Don Emley

Don was born in San Jose, California, and spent his early years growing up in Morgan Hill. His family eventually moved back to San Jose where he graduated from Pioneer High School. In 1981, Don opened one of several retail auto parts stores, All Parts Auto, at the northwest corner of Monterey Road and Spring Avenue in Morgan Hill. In 1986 Don was sponsored into Rotary by Ray Bunt (1985) and six years later he became the 1991-1992 Rotary Club of Morgan Hill (“Club”) President.

Vision

Don’s vision to form the Endowment was sparked in Spring 1991 after meeting a couple from the Rotary Club of Worcester, England who were visiting our District on a Rotary Friendship Exchange. At the conclusion of the exchange visit, a District wide event was held at Fortino Winery where the couple was introduced to Don by their Morgan Hill Rotarian hosts, Roger (1976) and Janie Knopf (1992). The visiting guests related a story of how their all-male Rotary Club was bequeathed a sum of money from Ms. F.J. Sawyer to be used to support a home for indigent, elderly women. The Rotary Club of Worcester, England formed an endowment named the Sawyer Trust to hold and administer those funds.

The concept of creating an endowment to support local Club philanthropy, according to Don, kept rolling around in his “noggin.” He reached out to Roger and Janie Knopf, Craig van Keulen (1982), Brent Creer (1985), Jim Jeisel (1987), and a few other Morgan Hill Rotarians who formed an exploratory committee to see if forming a local endowment for our Club was a worthwhile and possible endeavor.

In July 1991, as the newly installed Club President, Don announced his President’s Project, to form a local philanthropic charitable organization named the **Rotary Club of Morgan Hill Endowment**, with the sole corporate member being the Rotary Club of Morgan Hill. The Endowment is owned and managed by our Morgan Hill Rotary Club.

The Endowment would become the charitable depository for special bequests and fundraising with the purpose of growing the principal (“Permanent Fund”) to a size that would eventually fund all of the Rotary Club of Morgan Hill’s philanthropic local community giving. This new organization would be purposely titled as an Endowment to avoid confusion with, and set it apart from, the Rotary International “Rotary Foundation.”

*For clarity, **the Rotary International Rotary Foundation** is a separate and distinct IRC 501 c.3, not-for-profit charitable corporation. The Rotary Foundation is owned and managed by Rotary International. The primary focus of the Foundation is to support international projects and philanthropy worldwide. Donors to the Rotary International Foundation are acknowledged through the **Paul Harris Fellow** recognition program.*

Formation

To accomplish Don’s goal of creating a Permanent Fund for sustainable future philanthropic giving, and provide a tax deduction to Permanent Fund donors and Club fundraising donors, the Endowment was formed in 1992 as an IRC 501 c.3 not-for-profit charitable corporation – a public charity to receive bequests and donations.

The Endowment would be a distinctly separate entity from the every-day operations of the Rotary Club of Morgan Hill.

There are key differences between the Club and the Endowment entities with respect to how donations are treated for tax purposes:

Donations to the Club, an IRC 501.c.4 public service corporation, are only deductible by the payor as a business expense, but not tax deductible to the donor as a charitable contribution.

Donations to the Endowment, an IRC 501.c.3 not-for-profit charitable corporation, are tax deductible to the donor as a charitable contribution.

The initial seed money donation to the Endowment Permanent Fund came through long time Rotarian, Gary Newquist (1986), and his client, Marion Mitchell, who wanted a portion of her estate to go to a local philanthropic organization upon her death. In 1992, Gary, on behalf of Marion, donated the first \$10,000 to the Endowment and it was off and running.

Benefactor Rose Fitzimmons

Ralph and Rose Fitzimmons were long time Morgan Hill residents. Ralph was a graduate of UC Davis and a long time Ag teacher at Live Oak High School, where Britton Junior High School is now located. Ralph predeceased Rose, passing in 1972. Rose was a client of local CPA, Bill Stables. Bill was a client of Craig van Keulen (1982). Craig sponsored Bill into the Club in 1984.

In 1991, Rose Fitzimmons contacted Bill Stables, and told him she wanted to leave half her estate to a local philanthropic organization, and half to a University of California School. Bill reached out to Craig van Keulen, for a recommendation on local philanthropic organizations Rose could bequeath half of her estate. Craig informed Bill about the newly forming, Rotary Club of Morgan Hill Endowment, and suggested that Bill present the Endowment to Rose as an option. Rose agreed with Bill's suggestion, and left half of her estate to the Endowment.

The Rose Fitzimmons estate included a beautiful residence located at 17695 John Telfer Drive at end of West Main, at the base of El Toro.

Bill shared that Rose was contemplating which UC School she was going to leave the other 50% of her estate. Apparently, Rose was leaning towards UC Berkeley, until she saw a news report on television about Cal Berkeley students streaking through Sproul Plaza. That story, combined with Ralph's graduation from UC Davis, resulted in the remaining 50% bequest being left to UC Davis.

Don tells the story of Rose when she was at St Louise Hospital and would soon be moved to an elder care facility in Wyoming, where her only surviving relatives lived. Rose, at that time, was pretty frail but still very feisty and not happy about the move. Don received a call one morning that Rose was going to sign off on the deed to transfer her property into her Trust with the Endowment as beneficiary. Don recalls showing up at the hospital in sweats and t-shirt not realizing that it was a bit more formal event. Craig was there and a couple of doctors. The UC representatives – all decked out in three-piece suits were also there with a 'presentation book.' Don's thought was "crap, I brought nothing, and I'm a bit underdressed for this moment." Rose looked at the presentation book, looked at the rest of those present, and in somewhat of a gravelly voice said, "did anyone bring me a bottle of whiskey?" Don had no doubt that if someone had brought a bottle of whiskey, she would have taken a healthy swig. That was Rose Fitzimmons, our founding, feisty, and generous Endowment benefactor.

A great deal of time and care was taken by Don and the Endowment's founding board members, Roger Knopf, Craig van Keulen, Doug Van Horn (1988), Brent Creer, Kevin McGinty (1989), Gary Sargenti (1988), Jim Jeisel, Bill Brown (1982), and Bob Foster (1966) assisted by Rotarians, Gordon Seibert (1986), Bill McClintock (1978), Roger Malech (1985), and Arlene Greenberg (1990) to determine if the property was subdividable and more valuable if split into two lots. In the end, the best option was to sell the home "as is," and split the proceeds 50/50 with UC Davis.

Sadly, Bill Stables, who loved jazz music, passed from cancer in January 1994. Later, in the spring of that same year, Rose Fitzimmons passed, leaving 50% of her home to our Endowment Permanent Fund.

The Fitzimmons home was sold for approximately \$450,000 to a local anaesthesiologist, Dr. Ronald Stafford. The Endowment received approximately \$225,000, which stands as the Endowment’s single largest contribution to date.

Legacy Scholarships

To recognize the generous and transformative donation by Ralph and Rose Fitzimmons, the Endowment named, in their honor, the annual \$2000 **Ralph and Rose Fitzimmons Rotary High School Scholarship**. This scholarship is awarded to the best MHUSD public high school graduating senior pursuing higher education in the field of agriculture.

For being instrumental in the early funding of the Endowment, the Club honored Bill Stables by naming the **Bill Stables Rotary Music Scholarship**, an annual \$1,000 Rotary Endowment High School Scholarship given out each year to the most qualified public high school graduating senior pursuing higher education in the field of music.

The Don Emley Fellow

It is critical to continue building the Endowment Permanent Fund to \$2 million to support the long-term financial viability and sustainability of philanthropic giving by our Club to our local community.

The Don Emley Fellow is a way to recognize the vision of its founder, Don Emley, and all of the Morgan Hill community philanthropy the Endowment has provided to date. The Don Emley Fellow is also a vehicle for anyone to help our Endowment continue to move forward to achieve our goal of providing a sustainable source of funding for our Club’s community philanthropy, while also a way to reduce membership’s dependency on annual fundraisers in the future to provide that community philanthropy.

Recognition

The Don Emley Fellow recognition program, established in 2021, acknowledges any individual who contributes \$1,000 or more, or who has made contributions in aggregate of \$1,000, to the Endowment Permanent Fund.

Please donate to our Endowment to support our objective of sustainable community philanthropy and help us march toward our \$2 million goal by becoming a Don Emley Fellow today.

Endowment Presidents

<i>Don Emley</i>	<i>1992-1995</i>
<i>Roger Knopf</i>	<i>1995-1997</i>
<i>Brent Creer</i>	<i>1997-2001</i>
<i>Gary Sargenti</i>	<i>2001-2002</i>
<i>Craig van Keulen</i>	<i>2002-2003</i>
<i>Dan Gregg</i>	<i>2003-2007</i>
<i>Bob Foster</i>	<i>2007-2009</i>
<i>Roger Knopf</i>	<i>2009-2013</i>
<i>Carl Reinhardt</i>	<i>2013-2015</i>
<i>Del Foster</i>	<i>2015-2018</i>
<i>Tracy Newquist</i>	<i>2018-present</i>

Don Emley Fellow Recognition Pin

