

**DISTRICT 6630**

**MANUAL OF PROCEDURES**



Revised 1-11-19

## **Forward**

At the District Conference in April 2015, the delegates to the conference voted to change the bylaws of District 6630. One of the outcomes of this action was to remove certain parts of the bylaws that were considered to be part of a Manual of Procedures.

In the subsequent years, PDGs Julie West and Mike Davanzo began to put this Manual of Procedures together. This document was the result of discussions with district chairs and district leaders throughout the next several years.

In the Fall of 2018, DG Bev Ghent-Skrzynski brought the document to the Board of Directors. The Board was given the opportunity to read the document for another time and then vote on it. In January, the Board voted to approve of this Manual of Procedures.

January 2019

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# **SECTION I - AWARDS**

## **Awards from RI**

RI sends out announcements at various times for the DG to nominate recipients for various awards. Potential nominees should be suggested to DG. These are awarded by RI and are selected by RI. Included in this are: (this is the web site to access the forms and information about the awards)

<https://my.rotary.org/en/learning-reference/learn-topic/awards>

## **Recognize a Rotarian**

- Avenues of Service (No deadline)
- Club Builder Award (No deadline)
- Rotary Foundation Citation for Meritorious Service (No deadline)
- Rotary Foundation Distinguished Service Award (June 30)
- Rotary Foundation District Service Award (No deadline)
- RI Service Above Self Award (Oct 1)
- Service Award for a Polio Free World (Nov 1)
- Vocational Service Leadership Award (Nov 1)

## **Recognize a Rotary club**

- Membership Development Service Award (No deadline)
- Presidential Citation (June 30)

The **RI Presidential Citation** is awarded based upon criteria established by the Rotary International President to Clubs nominated by the District Governor. These awards and other recognitions may be presented by the District Governor or his/her designee at the District Governor's discretion at any place and time.

- Significant Achievement Award (March 15)

## **Recognize our partners in service**

- Presidential Citation for Interact Clubs (June 30)
- Presidential Citation for Rotaract Clubs (June 30)
- Rotaract Outstanding Project Award (February 1)
- Rotarian Spouse/Partner Service Award (March 1)
- Rotary Alumni Association of the Year Award (June 30)
- Rotary Award for Excellence in Service to Humanity (No Deadline)
- Rotary Global Alumni Service to Humanity Award (June 30)
- World Interact Week Recognition (No Deadline)
- World Rotaract Week Recognition (No Deadline)
- Rotary Award for Excellence in Service to Humanity (Non Rotarian)

**[PDF] ROTARY AWARD FOR EXCELLENCE IN SERVICE TO HUMANITY -  
ORDER FORM FOR DISTRICT GOVERNORS**

<https://www.rotary.org/myrotary/en/document/rotary-award-excellence-service-humanity-order-form-district-governors>

## **[DOC] DISTRICT SERVICE AWARDS ORDER FORM**

<https://www.rotary.org/myrotary/en/document/district-service-awards-order-form>

### **Awards from the District**

The District Governor has the discretion to establish recognitions and awards for clubs, members, and district leaders who provide their time and talent to District activities. Five awards have been established by tradition and are awarded on an annual basis:

**A Z Baker**-This is the District's highest recognition for club performance. The award was created in the memory of District Rotarian A.Z. Baker. The award is based on the aggregate achievement points earned by members' participation in club, district and RI activities as well as community activities, based on criteria established by the District Governor. It is intended to recognize well rounded clubs and clubs whose members participate at the club level and beyond.

### **Mike Johns Life Time Award**

A long standing member in good standing of Rotary District 6630 who has freely given of himself/herself by mentoring and sharing Rotary. Potential awardees include a past District, Zone or International officer or committee chair (not necessarily a PDG); a supporter of TRF to the best of their ability (not necessarily financial); someone who has touched our District in many ways.

### **Rotarian of the Year Award**

This award is awarded by the DG to a Rotarian who has been very outstanding in the District. It usually is awarded to a Rotarian who is active at many levels in the organization and shows a true commitment to the ideals and objectives of RI.

### **District Service Above Self Award**

This award is decided by the DG with help from the awards committee. It is presented to a Rotarian who has demonstrated the qualities of service above self during that year.

### **Gary M. Neuman Spouse/Partner Award**

**Purpose.** The District 6630 Rotarian Spouse/Partner Service Award, established in 2016, recognizes spouses and partners of Rotarians who have demonstrated exemplary humanitarian service within Rotary District 6630.

**Criteria.** Candidates are considered based solely on the humanitarian service they have rendered through Rotary District 6630, with an emphasis on personal volunteer efforts and active involvement in helping others. Personal financial contributions to Rotary, its Foundation, or any individual project are NOT relevant considerations for this award.

**Eligibility.** Any non-Rotarian spouse or partner of an active Rotarian in good standing may be nominated, except for spouses or partners of current and **immediate** past district governors, current RI directors, current RI trustees and other RI officers. An individual may receive the award only once. An especially important aspect of this award is that it may be presented posthumously if the spouse/partner has passed during the current Rotary year in which it is being presented. (Hence this award is unique in comparison to the RI Spouse/Partner award)

**Nominations.** In February, or earlier in the year, nominations are requested from Club Presidents in the District. Clubs submitting nominees must be good standing with RI and the District.

**Selection.** One recipient per year will be selected by the sitting District Governor and honored at the District Conference.



### **Awards Presentations**

Some awards may be presented at the District Conference. Usually, these are the RI Awards. The majority of awards are presented at the District Awards Program (more details in Section V).

## **SECTION II - DISTRICT COMMITTEES**

The following is a list of the committees of the District with a brief explanation of what the committee does and the make-up of the committee. The DG (as a DGE) selects the chairs and members of the committees. There are a few committees where the structure is dictated by the bylaws.

### **Advisory Council of Past District Governors**

The Advisory Council shall advise and counsel the District Governor and the District Governor-elect as may be requested by the District Governor.

The Advisory Council shall be comprised of all Past District Governors who are members of a District Club. *Ex-officio* members are the District Governor, the District Governor-elect, District Governor Nominee, and District Governor Nominee Designate.

The Chairperson shall be appointed by the District Governor-elect for a one-year term, but no person shall serve two consecutive one-year terms, or more than an aggregate of three one-year terms in that position. The Chairperson shall not simultaneously serve as the Vice Governor and in this leadership role. The Chairperson shall designate a secretary to maintain minutes of meetings of the Council and those minutes shall be circulated to the District Governor and all Past District Governors.

The DGE should set the schedule of meetings, typically four, for his/her DG year. One of these meetings provides for the District Governor-elect to present to The Advisory Council within thirty (30) days following his/her attendance at the Rotary International Assembly. The DGE and Chair shall determine when PDG spouse/partners shall be invited to attend Advisory Council meetings. The District Governor may call special meetings of the Council from time to time.

### **Alumni**

The Alumni Committee works with clubs to develop an action plan for keeping alumni of Rotary Programs e.g., Four-Way Test Contest, RYLA, Interact, Rotaract, Youth Exchange, Ambassadorial, Peace, and Global Scholars, Group Study and Friendship Exchange participants, involved in Rotary activities. The Committee may also:

- Coordinate alumni events and associations.
- Work with other committees to connect alumni with speaking opportunities and identify alumni who are good candidates for membership or Foundation giving.
- Encourage alumni and current program participants to report their data to RI.
- Create awareness of how to maintain relationships with alumni.

### **Awards**

The Awards Committee assists the District Governor with identifying candidates for District Awards and, at the District Governor's invitation, may also suggest candidates for Rotary International Awards.

### **Bylaws Review**

The Bylaws Review Committee provides periodic reviews of the District bylaws to insure they are in compliance with RI Constitution, Bylaws, and Procedures. Such a review is required after each Rotary International triennial Council on Legislation. Other reviews may be initiated as the need is identified. Each Bylaws Review Committee shall include at least one person who served on the previous Bylaws Review Committee for continuity and shall include one person with appropriate legal expertise.

### **Chaplain**

Chaplains participate in District events as requested by the District Governor. They usually assist with the Memorial Service/Celebration of Life Service held at District Conference which remembers members, spouse/partners, and friends of Rotary who have passed away during the Rotary year and who the clubs want to remember.

### **Club Extension**

The District Governor, in conjunction with a Chairperson the District Governor selects, is charged with the duty of identifying, qualifying and providing Charters to new clubs in the District. It is the duty of the District Governor, with the cooperation of all members, to take advantage of every opportunity to form new clubs within the District. The Chairperson selected by the District Governor shall oversee the organization and development of new clubs. The Chairperson shall further identify potential areas for club development and seek the cooperation of existing clubs which have territory contiguous to the prospective club. The Chairperson shall appoint members from the contiguous clubs to assist in the establishment and organization of the prospective clubs. Those members from the contiguous clubs shall continue to serve in the supporting and advisory capacity for the new club for such time as the District Governor and his or her successors deem necessary. The Club Extension Committee may be a sub-Committee of the Membership Committee.

### **Community Service**

The Community Service Chair works with clubs to develop local service projects that address the community's needs; encourages clubs to follow the [lifecycle of a project](#) and use Rotary's online tools for planning, implementing and evaluating; and may also encourage clubs to visit [Rotary Ideas](#) to find project partners and browse [Rotary Showcase](#) for ideas.

### **DG Home Club Rep**

The DG Home Club Representative is a member of the District Governor's Club who supports the DG within his/her club and serves as the interface between the DGs Club and other District leaders and member. This person may serve as the Chair of the Banner Exchange.

### **District Conference**

In Section IV of this document (page 16)

## **District Strategic Planning**

The District Strategic Planning Committee reviews and updates the existing strategic plan. The Strategic plan is usually a three-year plan. The Committee shall develop, recommend, and update a strategic plan for consideration by the board and shall survey Rotarians and Clubs not less than every three years in discharge of their duties:

- Assess the goals, objectives, needs and preferences of the District clubs and Rotary members. This may include a review of quantitative historical data and/or a District-wide membership needs assessment
- Evaluate current District services
- Develop District strategic goals and action plans
- Circulate the resulting strategic plan to the clubs and members in a cost-effective and efficient manner, including but not limited to the District website.

## **Finance**

See District Bylaws

## **Foundation**

The Foundation Committee is led by the District Foundation Chair and composed of the Chairs of the subcommittees which have responsibility for implementing and overseeing the fundraising for and the programs funded by The Rotary Foundation. This Committee is also responsible for education and training associated with Foundation fundraising and programs, including Grant Management and Foundation Seminars. The Foundation subcommittees are:

Foundation Audit – oversees the financial aspects of the money

### Foundation Fundraising sub-committees

Annual Fund Chair works with the clubs to encourage Rotarian giving to the annual fund and show the benefits of those contributions.

Major Gifts Chair works with Club Foundation Chairs and individuals to develop Benefactors, Major Donors, and Bequest Society and Arch Klumph Society members.

Paul Harris Society Chair works to develop Paul Harris Society Members.

Polio-Plus Chair works to create awareness of and generate funds for Polio Plus.

### Foundation –Grants

The Grants Sub-Committee is responsible for deciding how the District Designated Funds will be allocated to District Grants and Global Grants, the latter including Vocational Training Teams and Global Scholars. Grants Sub-Committee members come from all parts of the District and serve 3 year staggered terms. The Grants Sub-Committee meets the first Monday of every month.

Grants Committee members assist Club members who are seeking District Designated Funds for Club or Cluster service projects through the Grant application process.

All Clubs wishing to receive District Designated Funds must have at least 2 members who have attended the Grants Management Seminar.

### Foundation - Peace Fellows

The Peace Fellows Sub-Committee is responsible for distributing application materials to Clubs and elsewhere, interviewing candidates (each of whom must be endorsed by a Rotary Club), submitting qualified candidates to The Rotary Foundation Selection Committee, and maintaining contact with successful candidates. The Sub-Committee members include DG, IPDG, DGE, and at least one Peace Fellow graduate.

### Foundation - Stewardship

The Stewardship Sub-Committee is responsible for ensuring the careful management of Rotary Foundation grant funds and for educating Rotarians on proper and effective grant management. It oversees the Memorandum of Understanding process and participates in the Grant Management Seminars.

### Gift of Life

The Gift of Life Committee is the local arm of Gift of Life International which arranges life-saving heart surgeries for children in the U.S. and elsewhere. The Committee provides local support for the child and his/her family if surgery is performed in the District. The Committee also assists with projects that establish pediatric heart surgery clinics in developing countries, such as the recent Vocational Training Team project in Haiti (2012-14).

### Historian

The District Historian is responsible for maintaining a history of the District. A history of the District since the first Club was chartered in 1911 through 2015 was recently completed.

### Insurance Specialist

The Insurance Specialist, a qualified insurance agent, is a resource for both District and Club leadership regarding insurance requirements and questions. S/he will annually determine if additional coverage is needed beyond that provided by the Rotary International General Liability Insurance.

### International Convention Promotion

The International Convention Promotion Chair works with the Zone Promotion Chair to publicize the upcoming Convention and associated Zone events and encourage Rotarians from the District to attend.

### International Service

The International Service Chair encourages clubs to participate in international projects and works with them to identify resources within and beyond the District to develop international projects and design global grants of higher quality and greater scale.

### LEAD (Leadership Development & Training)

The LEAD Committee develops an integrated plan and schedule for leadership and development training and experiences for District and Club leaders for the Rotary year. Members include the District Governor, District Governor-Elect, District Governor Nominee, District Trainer, Membership Chair, Rotary Foundation Chair, Leadership 6630 Program Coordinator, Rotary Leadership Institute Coordinator, Assistant Governor Coordinator, a Rotary Club Past President, and at least one Assistant Governor.

### **Leadership 6630**

Leadership 6630 provides development opportunities for potential future District leaders who have been identified by the DG with support from the DGE and/or AG's. These opportunities expose participants to different activities and programs in the District. Unlike other District committees, this Committee is based on a calendar year.

The concept is for this program to develop a pool of Rotarians knowledgeable in various Rotary committees and programs from which new committee chairs and members can be selected and begin serving with a substantial background of knowledge of their new position. The program foregoes the normal classroom instruction model in favor of obtaining background knowledge through a comprehensive hands-on approach and personal participation in these programs and committees.

### **Membership Development**

The Membership Development Committee identifies strategies that will grow membership and promotes them to the clubs in the district so they can attract and engage new members. The Chair also works with the Club Extension Chair to identify locations for and develop new Rotary clubs.

### **Nominating Committee (chair – IPDG) Included in Bylaws and Transition Manual**

The District Nominating Committee is responsible for seeking and interviewing candidates for District Governor Nominee and recommending a candidate to the District Governor by January 31<sup>st</sup>. The Committee is also responsible for recommending a candidate for Vice Governor, based on input from the DGE, to the District Governor and, in the year following the Council on Legislation, recommending a candidate for our District's representative to the next Rotary International Council on Legislation. (See Article 14 RI Bylaws for process)

### **Presidents-elect Training Seminar**

The District Governor shall appoint to the All Ohio President-elect Training Seminar Steering Committee (All Ohio P.E.T.S.) the immediate Past District Governor, the District Governor, the District Governor-elect, the District Governor-nominee, and other members such as the District Trainer, as the District Governor deems necessary, five of whom will be voting members. The District shall promote participation in All Ohio P.E.T.S. in conjunction with the other Ohio districts on an ongoing basis as an integral part of the educational experience for club Presidents-elect.

The P.E.T.S. 1 Committee shall include but not limited be limited to the District Governor-elect, the District Governor-nominee, the District Trainer, and the District Executive Secretary. It is recommended that a recent Past District Governor also be included. The Chairperson of the P.E.T.S. 1 Steering Committee shall be appointed by the District Governor-Elect. It is the primary responsibility of the District Trainer to prepare for the district P.E.T.S. 1 Conference before All Ohio PETS and prepare the club President-elects for the All Ohio P.E.T.S. Conference.

Presidents-elect, including those serving an additional term, are expected to attend both sessions and the District Training Assembly. In the event a President-elect is unable to attend one or more of these valuable and helpful sessions, another member of their leadership team is expected to attend.

### **Public Image**

The Public Image Committee develops and implements a strategy for promoting Rotary, its programs and projects to the public. This includes membership development and support for Polio Plus. The Committee also provides support to clubs in their efforts to engage and inform the public.

### **Rotary Fellowships**

The Rotary Fellowships Committee educates Rotarians about Rotary Fellowships and encourages them to join.

### **Rotary Global Rewards**

The Rotary Global Rewards Committee is responsible for promoting Rotary Global Rewards and assisting members in creating and redeeming offers. Rotary Global Rewards is a new member benefit program that provides members discounts on a variety of products and services.

### **Rotary Leadership Institute (RLI)**

The Rotary Leadership Institute Committee is responsible for organizing and staffing RLI sessions which focus on leadership skills and Rotary programs and practices. RLI is an international organization founded and run by Rotarians. RLI sessions are facilitated by Rotarians trained in participatory learning techniques. Our District has partnered with two other Ohio Districts (6600 and 6650) to form the RLI North Coast Division.

### **Shelter Box**

The Shelter Box Committee is responsible for educating our members on Shelter Box's mission and projects and assisting Clubs in participating. Shelter Box provides immediate relief to disaster survivors and is a Rotary Project Partner.

### **Sunshine Committee**

The Sunshine Committee is responsible for reaching out to District Rotarians and their families when they are experiencing a serious illness or loss.

### **Transition Team**

The Transition Team's purpose is to facilitate the DG chain working together and to assure continuity in leadership of the District. While the District Governor is the sole decision maker in the district, there is also a need for the DG to understand the District and what has transpired in the past. In addition, there are protocols to be followed. The Transition Team also maintains a manual which is a guide as to what should be done at each level in the preparation of the DG (DGND, DGN, DGE) and the tasks of the immediate PDG. The Transition Team members are the DG, Immediate past DG, previous two DGs, DGE, DGN, and DGND (when chosen). Each July 1 the most senior PDG will rotate off. The Chair of the committee is the IPDG.

### **Vocational Service**

The Vocational Service Committee's role is to encourage members to use their professional skills to support service projects. They may also help identify and form vocational training teams.

### **Youth Services**

The Youth Services Committee is composed of the Chairs for 4-Way Test Speech Contest, Interact, Rotaract, RYLA, and Youth Exchange.

#### **4-Way Test Speech Contest**

This Committee organizes and runs the District 4-Way Test Speech Contest which is held in the spring prior to the District Conference. The winner and two runners up speak at the District Conference, traditionally at Lunch on Saturday. The winners do receive a monetary award from the district.

### Interact

This Committee encourages and supports Clubs sponsoring Interact Clubs of students ages 12-18 which enables them to connect with other young people in their community or school while developing their leadership skills through projects and other activities.

### Rotaract

This Committee encourages and supports Clubs sponsoring Rotaract Clubs which bring together young leaders ages 18-30 to take action in their communities and develop leadership skills while having fun.

### RYLA (Rotary Youth Leadership Awards)

This Committee plans, promotes, and delivers the weeklong leadership development program for students who have just completed their junior year in High School.

### Youth Exchange

There is a general chair that oversees the Youth Exchange Program. There is a chair for each one of these programs and they work together. Additional information about these programs is listed on the District Web Page.

#### Youth Exchange – Inbound Students

This program oversees all the incoming students on the long-term exchange. It also is responsible for the host families, certification of families and compliance.

#### Youth Exchange – Outbound Students

This program oversees all the long term out bound students including selection, orientation, commissioning, and contact during the year.

#### Youth Exchange – Short Term Students

This program oversees the short-term summer exchange program.

#### Youth Compliance Officer

This person is in charge of making sure that all rules and regulations are followed

#### Trainer

This person helps orientates and give guidance to the exchange students and families

## **SECTION III - DISTRICT CONFERENCE**

**General.** It is recommended that planning for the District Conference begin **at least** one year in advance of the prospective date for the next District Conference, preferably in the first half of the Rotary year. The District Governor-elect soon after appointment shall appoint members to a District Conference Committee, including the Conference Chair, Conference Secretary, Conference Finance Chair, and such other positions as the District Governor-elect deems necessary. The Committee shall develop a comprehensive and balanced program that includes innovative, timely, and educational presentations on subjects of Rotary and local interest, all of which shall conform to RI Content Guidelines. It is the responsibility of the Conference Chair and the District Governor to be fiscally responsible in conducting and promoting the District Conference and at no additional cost (other than the per capita assessment) to the District.

**Purpose.** Under the direction of the District Governor, the Committee shall plan, promote and implement the necessary arrangements to ensure a successful District Conference with maximum attendance.

**Composition.** Members of the Committee shall be appointed by the District Governor-elect, preferably with skills in the following areas: hospitality, event planning, meeting coordination, public relations, media relations, and marketing.

**Responsibilities.** The Committee shall select the District Conference venue and coordinate all logistics within the District to which the District Governor and the Presidents of a majority of the clubs agree. The projected dates of the District Conference shall not conflict with the dates scheduled for the Rotary Zone Institute, District Training Assembly, the International Assembly, or the International Convention. The District Training Assembly may be held in conjunction with the District Conference. The Committee shall establish a budget for the District Conference and submit it to the District Finance Committee for approval. Monthly District Conference Reports will be submitted of actual receipts and expenses versus budget to the District Treasurer. A final budget statement will be submitted to the DG and the District Treasurer within 30 days after the final invoice has been received. The District Treasurer will be responsible for all receipts and disbursements relative to the District Conference. The Conference Committee as expeditiously as possible will either forward receipts to the District Treasurer for deposit or deposit these receipts based on instructions from the District Treasurer. The District Treasurer will make all disbursements relative to the District Conference and only after approved documentation (original invoices, expense reports, etc.) has been submitted. Approval of the expenditures will be the responsibility of the Conference Chair, Conference Secretary or Conference Finance Chair.

The District Conference Committee shall be responsible for raising any funds beyond the per capita assessment necessary to meet the projected expenses of the District Conference.

In the event there is a surplus upon completion of the District Conference, that surplus shall be transferred to the District General Fund and shall be available to the District at the absolute discretion of the District Governor with the advice of the Board.



## **SECTION IV - DISTRICT FINANCES**

### **Budget**

The budget should be prepared by the DGE in conjunction with the DGN and the DG. It is recommended that the District Treasurer be invited to help with a history of expenditures and revenues. There are items in the budget (PETS ONE and the District Training Assembly) that the DGN will be doing as a DGE. The budget is created by the DGE with help from the above. The budget then goes to the finance committee for its approval and discussion. Once the budget is approved at that committee, it must be in the hands of the PEs at least one month before voting on it. Typically, this is done at the District Training Assembly. Therefore, the budget must be in the hands of the PEs at least one month before the DTA.

In 2013-2014, the finance committee has voted that the DGN, DGE, and DG along with spouses should be sent to the International Convention and have transportation, registration, lodging, and a per diem (at a rate about average cost) for both the Rotarian and spouse/partner. The District also reimburses the above for attendance at the Zone Institute, PETS, and ALL OHIO PETS.

The budget, which is approved by the PEs during the DTA, becomes effective July 1. During the following Rotary year there is a report to the membership at the business meeting at the District Conference. There are also regular reports to the Board of Directors, Finance Committee, and Council of Past Governors.

### **Budget Surplus**

The budget surplus from the prior year, if any, may be added to the emergency fund in the current year. The emergency fund shall not exceed five percent (5%) of the current year's budget.

### **Paid Positions**

The following positions receive a small stipend from the district. The amount is determined by the DGE in the Annual Budget which is approved at the DTA.

#### **The District Foundation Compliance Coordinator**

The need for this position and, if needed, whether it will be a paid position is determined each year by the DGE. This person works hand in hand with the grants committee. A job description is in Section VI District Positions.

#### **The District Newsletter Editor**

The Newsletter editor is responsible for receiving articles for the newsletter and compiling the newsletter which is sent in electronic form to the membership. At times, the newsletter editor may be asked to send out other information to the membership.

#### **The District Executive Secretary**

The District Executive Secretary is responsible for many operations of the district in addition to taking minutes at the various district meetings. There is a line item in the budget to cover office style expenses that are incurred as the result of carrying out the position. This includes, but not limited to paper, envelopes, stamps, ink, etc. The cost of attending functions, such as the DTA, PETS, DC where the individual is working throughout the event is subject to the discretion of the DG. They are generally not

reimbursed for mileage and/or food at other meetings. A complete job description is in Section VI District Positions.

#### The District Treasurer

The district treasurer is responsible for collecting and depositing dues and all financial transactions of the district. The DT is also responsible for filing or overseeing the filing of all documents required by law. There is a line item in the budget to cover office style expenses that are incurred as the result of carrying out the position. This includes, but not limited to paper, envelopes, stamps, ink, etc.

The cost of attending functions, such as the DTA, PETS, DC where the individual is working throughout the event is subject to the discretion of the DG. They are generally not reimbursed for mileage and/or food at other meetings. A complete job description is in Section VI District Positions.

#### The District Web Master.

The District Governor shall appoint the District Web Master. The District Web Master shall maintain and manage the District 6630 Web Site.

## **SECTION V- DISTRICT MEETINGS AND EVENTS**

The following are meetings and events that the DG (in some cases along with the DGE) will hold during the Rotary Year:

#### **All Ohio PETS (AOP)**

District 6630 joins with the other 4 Districts in Ohio to hold the annual presidents-elect training. The DGE is the chair of this committee. There are up to 5 voting members on the committee which include the immediate past district governor, the current governor, the governor nominee and a person of the DGE's choice. This committee is one fifth of the state committee and functions under the rules of the All Ohio PETS manual of procedures. The AOP seminar is in March of each year. The DGEs of the five districts plan the program. Each of the 5 districts has one member, usually the immediate past district governor, chair a portion of the event (general chair, registration, sergeant at arms, operations, and printed program). These responsibilities rotate each year through the districts. Each district is also responsible for providing facilitators and sergeant at arms for the seminar.

#### **Banner Exchange**

The banner exchange is the first opportunity for the new DG to set a tone for his/her year and it should be used for that purpose. The incoming DG plans the event, picks the location and time. It is important, however, to coordinate with the outgoing DG. The outgoing DG and DG's Club president should be there to present the "Home Club of the District Governor" banner to the incoming DG and the incoming DG's club's incoming president. Food, usually hors d'oeuvres, fruit, etc., and beverages are usually provided and served with the help of the DG's club. There is a charge (nominal) to cover the event. It should be cost neutral to the district.

The invitees should include the PDGs, AGs, PEs, and members of both the DG's club and the DGE's club. Chair people could also be invited.

The event includes social time, and the Banner Exchange ceremony. The ceremony usually includes Welcome (choose person), invocation (choose person), Pledge of Allegiance, (choose person), Four Way Test (choose person), installation (usually person considered special to the incoming DG), Banner Transfer and Pin Exchanges, followed by comments from the immediate PDG and incoming DG.

The Pin Exchange includes a "new" PDG pin given by the incoming DG to the immediate PDG. Then the DG will take the DGE pin and pin the incoming DGE. The incoming DGE will take his/her DGN pin and pin the incoming DGN. The new theme pins should be at the event to give to the attendees.

### **Club Events – District Leadership Attendance**

District leaders are invited to attend many Club events. Clubs are encouraged to pay for the tickets for invited District Leadership guests in general and the DG and his/her spouse/partner/guest in particular. If the ticket includes a raffle, then perhaps the food portion be covered. District Leadership may not be able to attend all Club events to which they are invited due to conflicting commitments and/or limited funding.

### **District Awards Program**

This is a DG function and usually happens during June, preferably not at same time as Rotary International Convention. The DG will decide on the program. There is usually food, fellowship, and the awards. There can be a small fee to the individuals to offset the cost for food. The cost of the awards is covered by the district dues. The DG may opt to present some awards at the District Conference, but the majority are presented at the Awards Program. The awards that are usually presented are listed in the Awards Section of the MOP.

### **District Conference (see above – Section IV)**

### **District Training Assembly**

The district assembly usually follows All Ohio PETS. It could be a standalone event or in combination with the District Conference. It is designed for the PE and the PE's team to continue the training that was started at PETS One and All Ohio PETS. There should be a "curriculum" generated by the DGE and his/her team for all the training.

This is usually an inexpensive event and about ½ day in duration. Typically the DGE has his/her budget approved at this meeting. The event is usually on a Saturday morning ending with lunch. There have been various ways of handling lunch. Based on the venue and food, the cost could fluctuate. At this event, there are usually a number of break out session with specific topics to help prepare the club chairs be effective in their roles. Also there is much information for the Rotarian at large.

### **Foundation Event**

The Foundation event is held after October, and usually, but not always, in November which is Foundation month. The main purpose of this is to recognize those clubs that made significant contributions to The Rotary Foundation during the previous year. The IPDG plans that part of

the event. The location, time, cost, and other aspects are planned by the DG and the DG appointed committee. The reason for holding this after October is that the awards for clubs from RI are not sent until the end of October or the beginning of November.

### **Foundation Seminars**

These may be planned by the District Foundation Chair and the Annual Giving Chair. They are designed to help clubs understand the role, structure, and value of the Rotary Foundation.

### **Grant Management Seminars**

There are usually three or four of these starting after January. The seminars are planned by the District Foundation Chair and the Foundation Committee. The purpose of these is to provide training to clubs in order for the clubs to apply for grants. This is in harmony with RI and subject to RI's rules and guidelines. Two members from a Club must attend one of these seminars to be eligible to apply for District and Global grants in the following Rotary year. The cost is normally covered by the district.

### **Governor's Official Visit**

In light of the above, it is suggested that the Board of Directors draft an operational statement and give it to clubs. This would explain protocol within Rotary. Items to be included (among other deemed worthy) in this are:

- Proper introductions when district leadership is visiting a club
- Proper introductions when district leadership is attending a club's function
- District leadership (including AGs) on official business should have their meals picked up by the club

### **ONE Rotary Summit**

This is in conjunction with the zone leadership/training program. The idea is to bring Rotarians from the district together to consider common challenges faced by Rotary clubs and possible solutions, in particular those related to Membership, The Rotary Foundation, and Public Image. This could be held as a standalone event or in conjunction with another training event. It is usually a half day event.

### **PETS ONE**

Planning for the DGE's PETS could begin after the DGN's All Ohio PETS meeting. The intent is for all three PE training activities (PETS ONE, ALL OHIO PETS and District Training Assembly) to build upon one another. The DGE should be assembling a committee with the DT, DFC, Membership Chair and perhaps DGN to plan the program. The DGE could also appoint a chair for this event.

The District trainer is picked by the DGE for his/her year as DG. It is important to have this person in place to work with the DGE in planning the training sessions. This is an important position as this person is asked to attend training sessions at Zone.

Location is decided by the DGN for the DGE year. The DGN could consult with the DGE, DG or PDGs for ideas and help in putting a package together. The decision is up to the DGN. This should be done soon after the DGE's PETS.

There is an attempt to keep the cost minimal. Usually it is set to cover the cost of food, AV, and Rent. The funding for the actual program and printing is covered by the district. Again, this should be a DGN decision with consultation.

In the Fall, RI should send a list of items that can be purchased for the PETS. RI will ask the DGN to choose print or electronic versions of the manuals. Print versions are recommended for all club officers. These will be shipped to the DGE's home sometime in the fall. Other items can be ordered. PDGs can be very helpful in sharing what each had. The amount to order should be one per club and AG and DGE.

At PETS One, the DGE could give "gifts" to the PE. These vary by DGE. This is up to each person. Usually, there is a sharing of info about costs and arrangements from one DGE to the next. PDGs should be invited to attend PETS One (usually at their expense – if eating, again, this is a DGE decision). Some can be used in the program or to help as the DGE sees fit.

It should be decided at All Ohio PETS Committee if Theme Pins should be distributed at the PETS One or only at the All Ohio PETS. This is decided by the 5 DGEs in the state at a meeting in early August.

### **PETS TWO**

This is a follow-up to PETS One. The determination is made by the DGE and the LEAD committee as to when and where. It could be a single event for the district or it can be held at various locations with part of the district at each one. This is usually held after PETS I and before All OHIO PETS.

### **Rotary Leadership Institute**

Our district is united with 6650 and 6600 in RLI North Coast Division. There is a district chair for RLI who meets with the district chairs of 6650 and 6600. The course of study and program are directed by RLI. The intent is to have facilitators in each district. There would be a RLI session in each district but the facilitators would come from the other two districts. There are 3 levels of RLI and they must be taken in sequence. The cost, location, and time are a joint decision by the three chairs. Sessions are usually offered in the fall and in the spring.

## **SECTION VI - DISTRICT POSITIONS**

Per the Bylaws of District 6630, the officers of the district include the District Governor, the District Governor-elect, the District Governor-nominee, the Vice Governor, the Assistant Governors, the District Executive Secretary, the District Treasurer, and the District Trainer. Included here are the additional positions in the District for which there are position descriptions.

### **Assistant Governors**

Assistant governors are appointed by the governor-elect and are responsible for assisting the governor with respect to administration of designated clubs. Duties for assistant governors may include the following:

- Meet with and assist the incoming club presidents to promote, implement, or review annually the Club Leadership Plan, discuss the clubs' goals and review section 2.010.1 “*Failure to Function*” of this Code
- Encourage clubs to enter and monitor their goals in Rotary Club Central
- Visit each club regularly to discuss the club activities, resources, and opportunities
- Assist club leaders in scheduling and planning for the governor’s official visit and attend each club assembly associated with the governor’s official visit
- Assist in the development of district goals
- Keep the governor informed on progress of the clubs
- Ensure that clubs update their membership regularly and pay their dues on time Rotary Code of Policies 65 April 2016 17.030.1
- Coordinate training at the club level with the appropriate district committee
- Promote the District Leadership Plan, the Club Leadership Plan and all applicable RI online tools and resources
- Advise the incoming governor on district committee selections
- Attend and promote attendance at the district conference and other district and international meetings
- Participate in district activities and attend all training seminars
- Provide recommendations on future assistant governor and committee members

Minimum criteria in selecting assistant governors include:

- membership, other than honorary, in good standing in a club in the district for at least three years
- service as president of a club for a full term, or as a charter president of a club having served the full term from the date of charter to 30 June, provided that this period is at least six months
- willingness and ability to accept the responsibilities of assistant governor
- demonstrated outstanding performance at the club- and/or district-level
- potential for future leadership in the district
- Assistant governors are to be appointed on an annual basis.
- Assistant governors may serve for a period of three one-year terms. Assistant governors may serve an additional period of three one-year terms two years after their last one-year term.

### **Assistant Governor Coordinator**

The AGC provides training and guidance for AGs and serves as an interface between them and the DG.

### **Council on Legislation/Council on Resolutions Representative**

Duties of a Council representative are as follows:

- Assist clubs in preparing proposed resolutions and enactments;
- Discuss proposed resolutions and enactments at district meetings;
- Be knowledgeable of the attitudes of Rotarians within the district;
- Give critical consideration to all proposed resolutions and enactments and effectively communicate his or her views on such proposals to the Councils;
- Act as an objective legislator;
- Participate in the Council on Resolutions;
- Attend the Council on Legislation for its full duration; and
- Report on the deliberations of the Councils to his or her clubs following the meetings of the Councils.

### **District Assistant Secretary**

In the event the District Executive Secretary is to be replaced by the District Governor-elect, the District Governor shall appoint the incoming District Executive Secretary as the new District Assistant Secretary to assist in their training for their new position as District Executive Secretary. It shall be the duty of the Assistant Secretary to become fully knowledgeable of the duties and responsibilities of the Executive Secretary and to assist the Secretary as needed or assigned. The District Assistant Secretary shall receive no compensation but may be reimbursed for appropriate out-of-pocket expenses.

### **District Governor (DG)**

The DG is the RI President's official representative in the district. This person is in charge of the entire district and works with the Board and various committees to set goals for the district and to promote the agenda of the RI President. The duties include but are not limited to the following: hold meetings to plan for the District Conference; plan and hold Foundation Event; plan and attend all meetings at the district level; visit Clubs and then revisit as needed; attend functions are invited by clubs.

Detailed responsibilities of the DG include but are not limited to

- Strengthening existing clubs
- Following the District Governor Code of Ethics
- Fostering continuity by working with past, current, and incoming district leaders
- Making sure your district leadership team is fulfilling its responsibilities
- Sharing the status of clubs with the district governor-elect before the International Assembly and offering recommendations for strengthening weak clubs
- Involving the governor-elect by assigning him or her specific responsibilities for committees, administration, or meetings
- Helping the governor-elect plan and prepare for incoming officer training meetings
- Reporting promptly to RI as required by the RI president or Board
- Ensuring that district nominations and elections are conducted according to the RI Constitution and Bylaws and other RI policies
- Transferring district files to the governor-elect at the end of your year
- Encouraging open communication among clubs, as well as between clubs and RI
- Conducting an official visit with each club (may be as multi-club meetings) to raise awareness of important Rotary issues, provide special attention to weak and struggling clubs, motivate club members to participate in service activities, and recognize the contributions of Rotarians

- Communicating at least monthly with each club president and secretary
- Conducting district meetings including the district conference, district leadership seminar, and district Rotary Foundation seminar
- Serving as a spokesperson for your district and RI when appropriate
- Promoting membership growth by working with district leaders and club presidents to establish realistic membership goals for each club
- Tracking clubs' dues payment to RI to ensure that dues are paid by the deadline set by RI
- Organizing new clubs
- Regularly inquiring about the activities of Rotarian organizations operating in the district
- Supporting The Rotary Foundation through fundraising and grant activities
- Performing such other duties as an officer of Rotary

### **District Governor Elect (DGE)**

The DGE works with DG for list of dates of meetings for which attendance is required and/or encouraged. These meetings will include Finance Committee, Board of Directors, Grants, Planning meetings for PETS, All OHIO, DTA, and the DC, Foundation Event, Leadership Development, District Transition Committee, AG Training, The Council of PDGs and Membership. The DG may assign the DGE to committees with a specific role or as a general member.

### **District Governor Nominee (DGN)**

The DGN works with DG and DGE for list of dates of meetings for which attendance is required and/or encouraged. These meetings will include Finance Committee, Board of Directors, Grants, Planning meetings for PETS, All OHIO, DTA, and the DC, Foundation Event, Leadership Development, District Transition Committee, AG Training, Advisory Council of PDGs and Membership. The DG may assign the DGN to a committee with a specific role or as a general member.

### **District Governor Nominee Designate (DGND)**

The DGND is to be named by the end of the calendar year. Once named, this person begins the training and acclimation to the office of the Governor.

### **District Foundation Chair**

Leads the Foundation committee and works with all subcommittee members. This is a three-year term and follows the RI rules.

### **District Foundation Compliance Coordinator**

The DFCC will work with the District Rotary Foundation Chair, Grants Committee Chair, the Stewardship Chair, the Audit Committee Chair, and others such as AARFC as appropriate to:

- Develop guidelines for the Committee that ensure that RI funds obtained and used by the district would be secure, traceable and transparent throughout the time they are in district possession.
- Develop guidelines to clarify grant request procedures for use by district clubs
- Review and revise documentation and grant application materials for ease of use by district clubs.
- Suggest personnel to replace expiring terms, open positions, or new positions, committees or sub-committees as necessary. These personnel will be approved by the DRFC and DG.



- Make appropriate revisions to the MOU and other appropriate materials required for Club and District Qualification for the upcoming year. These guidelines will be approved by DRFC and the DG.
- Identify necessary adjustments to Grants, Stewardship, or Audit operations or potential compliance issues.

### **The District Newsletter Editor**

The Newsletter editor is responsible for receiving articles for the newsletter and compiling the newsletter which is sent in electronic form to the membership. At times, the newsletter editor may be asked to send out other information to the membership.

### **District Executive Secretary**

The responsibilities of the District Executive Secretary include the following:

- Assist the District Governor with the administrative affairs of the District, keep and publish minutes of the Board meetings, compile and publish district attendance reports, prepare the District Directory, assist in the planning of District activities, manage all registration for principal District activities, monitor District membership files, and perform other duties and responsibilities as may be assigned by the District Governor
- Administer a District Office with an address and telephone number known to all; the address, which will be reported to the statutory agent annually, shall be a Post Office box.
- Maintain a written job and task description for all operations of the office and provide it to his or her successor;

The District Executive Secretary may receive compensation for services provided, and may be reimbursed for expenses in the performance of District business as approved by the District Treasurer and in accordance with District Expense Reimbursement Policy.

### **District Trainer**

The responsibilities of the District Trainer include the following:

- The training of incoming class of club Presidents;
- The training of the Assistant Governors, in collaboration with the Assistant Governor Coordinator;
- The preparation of the District Governor-elect and District Governor-nominee, for training at the Zone Training Session and the International Assembly, as well as educating them on district policies, practices and issues.
- Coordinate training at the club level with the appropriate district committee
- Promote the District Leadership Plan, the Club Leadership Plan and all applicable RI online tools and resources
- Advise the incoming governor on district committee selections
- Attend and promote attendance at the district conference and other district and international meetings
- Participate in district activities and attend all training seminars
- Provide recommendations on future assistant governor and committee members

## **District Treasurer**

The responsibilities of the District Treasurer include the following:

- Serve as custodian of all District funds and be responsible for the billing and collection of all levies.
- Pay all justifiable bills, maintain complete financial records, and provide variance budget reports to the District Governor and to the funded committees as needed.
- Submit monthly reports to the District Finance Committee and Board of Directors for their review
- Prepare and submit reports for an annual financial review.

All checks and authorization for other disbursements require the District Treasurer's signature, or in the absence of the Treasurer, authorized signors may be the District Governor, the District Governor-elect, or the District Executive Secretary, or another officer of the Corporation as authorized by the Board. However, any check or authorized disbursement which exceeds two thousand dollars (\$2,000) requires the signature of the District Treasurer and one other officer of the District. In no event shall a check or other disbursement payable to an officer be signed by that officer.

The District Treasurer may receive compensation for services provided and may be reimbursed for expenses in the performance of District business as approved by the District Governor and in accordance with the District Expense Reimbursement Policy.

## **District Webmaster**

The District Web Master shall work in collaboration with the District Governor, District Executive Secretary, and other District committees, as directed by the District Governor. The District Web Master shall coordinate activities for the dissemination of information about the clubs and their members, as well as provide exposure and promotion of the principles of the District and Rotary International.

## **IPDG (Immediate Past District Governor)**

The immediate PDG sits on several committees and helps as requested by the DG. There are two main tasks: Chair the nominating committee that picks the next eventual DG and recommends Rotarians for positions. The other task is to chair one aspect of the ALL OHIO PETS. This is on a rotating basis among the 5 districts in Ohio. This IPDG should also be very supportive of the DG and all the DG activities. The IPDG also becomes a member of the Advisory Council of Past District Governors.

## **Vice Governor**

The vice governor's role is to attend most of the meetings of the district and to be informed and ready to take the place of the District Governor if the District Governor is not able to fulfill the duties of a District Governor.

The VG is selected in the following manner. The current DGE picks from the PDGs a person who will be willing to step into the position of DG, if needed, and who is willing to attend meetings to keep current with the district affairs. The name of the VG elect is shared with the nominating committee when the nominating committee is choosing the DGND. If the nominating committee agrees, the person will be elected at the annual meeting.

At the annual meeting, the District Executive Secretary conducts the vote to approve the appointment. There is no budget to support the position of the VG.

If the Vice Governor is called upon to assume the duties of the DG and is not able to do that, then the Council of Past District Governors will select that person.

## **SECTION VII - MISCELLANEOUS INFORMATION**

### **Directory**

The directory is usually printed in a small book form. This format seems to be very popular with the Rotarians. The directory should be printed as early in the DG year as possible. Pictures of the PEs and AGs, etc. for the directory could be taken at PETS ONE with follow up with those who were not there. The DGE and District Executive Secretary work together to try to get all the information from all the clubs. The DGE also needs to have bios, committee appointments, District calendar and any other information to the District Executive Secretary in a timely manner for those parts of the directory. It is about a month turn around once the District Executive Secretary has all the information.

Once it is printed the DG distributes about 5 per club. Every PDG also receives one and most committee chairs. The idea of having it on line is open to discussion

## **THE LANGUAGE OF ROTARY**

AG	Assistant Governor (or ADG-Assistant District Governor)
COL	Council on Legislation (meets triennially)
COR	Council on Resolutions (meets annually, electronically)
DDF	District Designated Funds
DG	District Governor
DGE	District Governor-elect
DGN	District Governor Nominee
DGND	District Governor Nominee Designate
DT	District Trainer
GETS	Governor-elect Training Seminar
GMS	Grants Management Seminar
GSE	Group Study Exchange
MOP	Manual of Procedure (revised every 3 years)
OD	Official Directory (revised yearly)
PDG	Past District Governor
PE	President-elect
PETS	President-elect Training Seminar
PHF	Paul Harris Fellow
PN	President Nominee
PP	Past President
PPE	Preserve Planet Earth
PPP	POLIOPLUS Partners
PRID	Past Rotary International Director
PRIMC	Past Rotary International Membership Coordinator
PRIP	Past Rotary International President
PRIT	Past Rotary International Treasurer
PTRFT	Past Rotary International Foundation Trustee
RC	Rotary Coordinator
RFE	Rotary Friendship Exchange
RI	Rotary International
RIBI	Rotary International Great Britain and Ireland
RID	Rotary International Director
RIDE	Rotary International Director-elect
RIMC	Rotary International Membership Coordinator
RIMZC	Rotary International Membership Zone Coordinator
RIP	Rotary International President
RIPE	Rotary International President-elect
RLI	Rotary Leadership Institute
RRFC	Regional Rotary Foundation Coordinator
RRIMC	Regional Rotary International Membership Coordinator
RV	Rotary Volunteers
RYE	Rotary Youth Exchange
RYEO	Rotary Youth Exchange Officer
RYLA	Rotary Youth Leadership Awards

TRF	The Rotary Foundation
TRFT	The Rotary Foundation Trustee
VTT	Vocational Training Team
WCS	World Community Service



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