DGND through DGE Preparation Calendar
Prior to Your Service as District Governor

The intent of this **21-month calendar** is to bring to your attention some suggestions & organizational items that will hopefully assist you in planning - prior to your year of service as District Governor. Because it is understood that Districts vary in protocol, procedure and precedent, this calendar is a guideline, not a mandate. It is for your use and we hope you experience great success as you incorporate some of the suggested items.

HELP YOURSELF

A. Be sure you are registered on **MY ROTARY** on the Rotary International website at www.rotary.org.

B. Familiarize yourself with the RI website, Rotary Club Central and Rotary Showcase.

C. Familiarize yourself with your own District's website.

D. Get to know your District's Assistant Governors. How many are in their 1st, 2nd, or 3rd year of service? How many new AG will you be responsible for appointing and re-appointing?

E. Get to know your District Committee Chairs and members. Do you understand all their roles and responsibilities? Are you prepared to appoint, re-appoint or replace?

F. Understand your District's geographic area. Do your best to get to as many Clubs as you can, prior to your years of service as DGN, DGE and DG.

G. Have good representation from the entire District on your District Leadership Team.

H. Be engaged at every Rotary and District event you attend.

I. Familiarize yourself with your Rotary Coordinator (RC), Regional Rotary Foundation Coordinator (RRFC) and Rotary Public Image Coordinator (RPIC). They and their respective Assistant Coordinators, are your new best friends. They will be a great resource to you and your Club leaders in the next three years. Please use them!

J. Listen.

K. Say "thank you" at every opportunity.

PRIORITIES AS DGND, DGN & DGE

A. Does your District have a "Strategic Plan" for the benefit of those Clubs you serve? If not, should you?

B. Familiarize yourself with the **ROTARY INTERNATIONAL ACTION PLAN**.

YOU HAVE BEEN SELECTED TO SERVE AS DISTRICT GOVERNOR

DGND **1 of 21**	☐ Order a copy of the Rotary International **Manual of Procedure** and read it! The MOP includes the institutional memory and governing documents of Rotary, compiled since our early years and is reviewed and changed through action of the Council on Legislation every three years. Familiarity with the MOP will assist you in the handling of sensitive issues that may develop in your District.
	☐ Begin visiting Clubs throughout your District…because you need to get to know your District and your Clubs need to get to know you.
	☐ Begin to identify potential District leaders from among the current and past Club Presidents and add them to your database of possible District Committee Chairs, Committee members and AG.
	☐ Plan on attending ALL District meetings such as District Leadership Team Training, PETS, District Assembly, District Advisory Board (or similar committees within your District), District Finance Committee and District Conference. This is a time for observation, listening, asking questions and meeting with those currently serving at the District level.
	☐ Select the date AND site of your District Conference and book your block of hotel rooms.
	☐ Select (and select wisely) your District Conference Chair and committee members.
	☐ Be sure your correct contact information is sent to RI (done by Chair of Nominating Committee).

DGND until July 1 2 of 21	☐ Develop your 3-year calendar; be sure to include important governmental and religious holidays to avoid conflicts.
	☐ Become familiar with your District Leadership Plan as recommended by RI and as approved by your District. (You may have to search for this!...don't hesitate to ask your PDG for assistance.)
	☐ Review and understand your District's organizational chart. If your District does not have an organizational chart, you may want to work with your DG, DGE, DGN & PDG to create one.
	☐ Attend AG meetings and area/group Club meetings; with the intent to listen, observe and learn.
	☐ Attend and participate in your District's Rotary Foundation, Membership & Public Image Seminars.

DGN July-December 3 of 21	☐ Continue to visit the Clubs in your District. Use these Club visits as a time to find out the important issues facing your Clubs and their members.
	☐ **Attend Zone 28 or 32 REGIONAL SEMINARS on TRF, Membership & Public Image** (dates vary).
	☐ Begin thinking about what your focuses will be as you look forward to your year as District Governor. Some things will (likely) not change and so you can expect that **MEMBERSHIP attraction, engagement and retention**, as well as support for **OUR ROTARY FOUNDATION**, and continuing to actively promote **ROTARY'S PUBLIC IMAGE** will be the priorities of your Rotary International President.
	☐ Proactively meet as many District Committee Chairs and members as you can. Ask them about the functions/purposes of their specific committees as well as successes of their committees, best practices and outcomes of their committees in relationship to the Clubs.
	☐ **Attend the Zones 28 & 32 District Governor-nominee Training, convened by your RI Director.**
	☐ Work closely with the DGE in the planning of the District learning events such as District Leadership Team Training, PETS and District Assembly. Remember, in one-year, these events will be your responsibility
	☐ Work with your District Education Chair (District Trainer) or appoint this person depending on your District's appointment cycle and District Leadership Plan and District Training Committee members.
	☐ You should be a member of the District Rotary Foundation Committee and all sub-committees.
	☐ **A successful District Governor is one who shares leadership and is surrounded by quality people.** You will be making appointments to positions of District leadership. Make it a point to create an inventory of potential District leaders as you are visiting Clubs. This is the time when you should be looking forward to your appointments to the positions of Assistant Governors and District Committee Chairs.
	☐ Begin thinking about your **Club Visitation Schedule**. Are you planning to visit each Club individually or are you thinking about "group" meetings (which may be centered around special events such as Paul Harris Dinners, a Million Dollar Foundation Event or a Membership Development event)? This schedule should be presented to your Club Presidents-elect at PETS. Typically, a "Club Visit" involves a meeting with the Board of Directors…not just sitting in on a board meeting! The distinction is important because you need to have time to share your vision and plans with your Club leadership…and they, to share their plans, successes and concerns, with you.
	☐ Continue to be thinking about your District Conference, which will be the culmination of your year as District Governor. Over the next 2+ years, you will meet many great Rotarians and will be exposed to some wonderful programs. Think about your conference and consider if any of these people and/or programs will enhance the conference experience for those who attend. Remember, a District Conference should be educational, motivational and inspirational…a celebration. This is not a training session. Focus on Rotary and have fun!!
	☐ **Attend Zone 28 or 32 REGIONAL SEMINARS on TRF, Membership & Public Image** (dates vary).

DGN January Month 4 of 21	☐ Order your Rotary business cards with photo? (if not already done) and stationary. Include "word friendly" letterhead as you will likely be sending out more electronic than hard-copy communication. All Rotary artwork is available at www.rotary.org.
	☐ Give the DG or District Administrator your photo and brief bio for use at the District level.
	☐ Send any changes to your contact information to RI Club and District Support (CDS) staff.
	☐ Meet with your DG and DGE (face-to-face/conference calls/Zoom) on a regular basis.
	☐ Appoint District Treasurer for your DG year (consistent with your District Leadership Plan).

	☐ Meet with DGE and (current) District Treasurer regarding District Budget effective July 1.
DGN January Month 4 of 21 Continued	☐ Create your own filing system (hard copy and electronic).
	☐ Install a fax machine (yes, you still may need one on occasion) and scanner, if you have not already done so. You may or may not need this. ☺
	☐ Consider PDF conversion software (word to PDF or PDF to word) if using a PC. These features are standard with any Mac.

DGN February Month 5 of 21	☐ The District Finance Committee will meet to finalize your DGEs budget (or near this time). Take good notes and ask questions to be sure you understand the District's budget as well as the process.
	☐ Appoint District Secretary for your DG year (consistent with your District Leadership Plan).
	☐ Appoint your District Conference Committee Chair and committee (if not already done).
	☐ Finalize site location and date for your District Conference (if not already done).
	☐ Finalize dates and locations for District Leadership Team Training, PETS and District Assembly for your year as DGE (if not already done).
	☐ Be sure you are on your Multi-District PETS or District PETS Planning Committee.
	☐ Attend the Council Meetings of your past, present and future District Governors.

DGN March Month 6 of 21	☐ Plan conversations with your PDGs and other District leaders for suggestions and ideas.
	☐ Attend your District's PETS.
	☐ If possible, attend one or more PETS outside your own District or Multi-District event. This will give you ideas that you may include in the planning for your own PETS, just one short year from now.
	☐ Talk with your own Club about your DG installation event; start thinking about a date and venue. Some Districts are having their "changing of the guard" at District Conference. This may allow for (potentially) greater member involvement and combines two events into one.
	☐ Talk with your own Club members about their role during your year as DG.

DGN April Month 7 of 21	☐ Appoint/Invite District Advisory Board (or similar committee) members (consistent with your District Leadership Plan).
	☐ Appoint District Board members (if your District is incorporated and consistent with your District's by-laws). All protocol should follow your District's By-Laws.
	☐ Attend and participate (as invited) in District Assembly (dates may vary).
	☐ What is your role in this year's District Conference?

DGN May Month 8 of 21	☐ Attend the Rotary International Convention (dates vary).
	☐ Election as DGE at the RI Convention (dates vary).
	☐ Continue working on your 3-year calendar which should include all District Committee meetings as well as your own education events.

DGN June Month 9 of 21	☐ Attend DG Installation (dates vary).
	☐ District Conference venue contracts should be finalized.
	☐ District Assembly venue contracts should be finalized.
	☐ You will start receiving appropriate information from Rotary International (electronic communication). This is where your electronic and hard copy filing system will be put to good use. ***Keep on top of all requests for information and respond as needed.***

YOU ARE NOW THE DISTRICT GOVERNOR-ELECT

DGE July Month 10 of 21	☐ Continue to receive appropriate information from RI…regularly.
	☐ Attend Club events when invited (or just show up if you see value in the event).
	☐ Attend several of the District Governor's Official Club Visits.
	☐ Continue to visit Clubs throughout the District…because you will get to know your Clubs better and your Clubs will get to know you…before you walk in the door as DG.
	☐ You will receive your **DISTRICT GOVERNOR'S MANUAL**. This is meant to be read, not placed on a shelf. Please read, highlight and make notes in this manual. It is intended to prepare you for your year of service. Your Governor-elect Training Seminar (GETS) leaders and International

	Training leaders will have the expectation that you have read the DG Manual.
	☐ Begin to communicate with your Presidents-elect (PE).
	☐ Observe and participate in District Rotary Foundation Committee and sub-committee meetings.

DGE August Month 11 of 21	☐ Who is your District Education Chair? Who are the members of your Education Committee/Team? If you are just now selecting/working with your education team…you are behind the planning curve.
	☐ You might receive an **ESTIMATED BUDGET ALLOCATION WORKSHEET** from RI asking for the anticipated number of overnight stays you are planning during your year as DG and relative to your Official Club Visits.
	☐ **Attend Zone 28 or 32 REGIONAL SEMINARS on TRF, Membership & Public Image** (dates vary).

DGE September Month 12 of 21	☐ You are **REQUIRED** to attend the **Zones 28 & 32 Governor-Elect Training Seminar (GETS**), convened by your RI Director (dates will vary from year to year).
	☐ Continue to compile your list of potential District appointments. Are you prepared to make the appropriate appointments to assist in building stronger Rotary Clubs? Does your District recruit for 3-year appointments with an annual re-appointment by the DG?
	☐ **DISTRICT APPOINTMENT FORMS** will be sent to you (electronically) for both Rotary International and The Rotary Foundation (TRF) committees in your District. This is a several page document. Please complete this form in a timely manner. Others are counting on the information that you will include in this document. If no name is provided to RI, YOU get the communication…
	☐ You will receive information relative to the **INTERNATIONAL ASSEMBLY** such as registration for you (and your spouse/partner), hotel registration information and flight information (you are required to go through Rotary International's Travel Service). Complete all information in a timely manner. You are required to attend the Assembly for the entire duration. Your expenses are paid by RI. Your spouse/partner's expenses are covered as long as they attend ALL sessions.
	☐ You will be receiving promotional materials for the RI Convention. Your DGN would be a good selection to serve as your "On to the RI Convention" Committee chair.

DGE October Month 13 of 21	☐ Select Assistant Governors to serve during your DG year (consistent with your District Leadership Plan). Make sure they understand their role and the responsibilities of their commitment.
	☐ Finalize plans for your Assistant Governor Training. Consider using "retiring" (and effective) AG as part of your training team for this event.
	☐ Be sure you know those you are appointing or re-appointing to all your District Committees & AG. 1. Thank all for their past service. 2. If you are re-appointing, ASK if they are interested in continuing to serve (consistent with your District Leadership Plan). 3. Invite and ASK any new appointees (discuss role and responsibilities as well as your goals).
	☐ Depending on your personal plans and perhaps traditions in your District, determine a gift/trinket that you will share with other DGE at the International Assembly. Whatever you decide, be sure you have a sufficient number of business cards for sharing (for you and your spouse/partner). You may want to discuss what has been done in the past with your PDG. (In lieu of a gift in the past few years, many DGE have made a contribution to the Polio Eradication effort and made a note of such a contribution with their business card.)

DGE November Month 14 of 21	☐ Finalize all District Committee appointments (RI and TRF) and complete the District Appointment Form and return to RI in a timely manner.
	☐ You may want to host a "Get Acquainted" session at your home (or another casual environment) to learn more about your Committee Chairs and AGs, to begin planning and to develop a "leadership team camaraderie" that will carry you and your team forward for the next 18 months.
	☐ If not already done, formally invite Committee Chairs and members and AG to serve. Remember, all serve at the pleasure of the District Governor.
	☐ Attend and participate in the District Rotary Foundation, Membership & Public Image Seminars.

DGE December Month 15 of 21	☐ District Governor Nominating Committee - what is your role? (dates vary)
	☐ Continue working with your District Education chair and team regarding agendas and speakers/ presenters for your District Leadership Team Session, Assistant Governor Training, PETS and District Assembly.
	☐ Continue regular meetings with your District Conference Committee.
	☐ Meet with your District Treasurer and District Finance Committee to draft budget for your DG year. Include your DGN and your DGND in these discussions…it will help them in their planning.
	☐ Discuss the District's website with your DG and webmaster. What should be changed an/or updated? Please make sure your website is kept current and relevant.
	☐ Are you going to have a printed district directory or are you going to have an electronic directory? Do you have all the information you need for your directory? (District Leadership, AG, Committees, AG, Club Presidents, Club Secretaries, Club Youth Exchange Officers, RI Director, RI President, RI Club and District Support, District Calendar, and/or other information of value in your District).
	☐ Finalize your **OFFICIAL CLUB VISITATION** schedule. You may need this information to finalize your DG allocation from RI.

DGE January Month 16 of 21	☐ Are all of your training agendas finalized? At this point, you will want to re-confirm all your speakers and presenters.
	☐ Meet with your DG.
	☐ Meet with your DGN.
	☐ Meet with your DGND.
	☐ Are you ready for the International Assembly?
	☐ RI will be mailing a sufficient number of **CLUB OFFICER KITS** for your PE at PETS. Included in this mailing are the **CLUB PRESIDENT'S MANUALS, CLUB SECRETARY MANUALS, CLUB TREASURER'S MANUALS** and **COMMITTEE MANUALS**. (All of these manuals are also available electronically on the RI website at www.rotary.org). As with your DG Manual, these materials don't do anyone any good if they are put on a shelf or in a drawer; they are produced to be read, used and referenced.
	☐ Attend District Governor Training at the **Rotary International Assembly** (for the full duration).
	☐ Following the International Assembly, you will receive the **PRESIDENTIAL CITATION** or president's focus materials. These should be distributed to your Club Presidents-elect at PETS

DGE February Month 17 of 21	☐ Meet with your past, present and future leaders. Share your International Assembly experience as well as your goals for your District.
	☐ District Leadership Team Training and Assistant Governor Training takes place.
	☐ Finance Committee meeting regarding final budget for upcoming Rotary year.
	☐ Know when you are to have your budget approved and by whom (Presidents or Presidents-elect, or voting delegates to the District Conference, etc.) Please reference your District Leadership Plan and/or your District by-laws.
	☐ Determine concepts and a format for your monthly DG Newsletter. Are you creating the newsletter or do you have a newsletter editor?
	☐ Go over the final details of your Official Club Visitation schedule (which will be distributed to your PE at PETS).
	☐ Complete Pre-PETS as is consistent with your District Leadership Plan.

DGE March Month 18 of 21	☐ PETS
	☐ Ask Presidents-elect to enter their Goals on Rotary Club Central. The history of each Club is included on their Club site at Rotary Club Central (Member Access needed).
	☐ Finalize all plans and agenda for District Assembly. Re-confirm all speakers and presenters.
	☐ Continue final planning.

DGE April Month 19 of 21	☐ District Assembly (dates will vary depending on the year and the District).
	☐ District Conference (dates will vary depending on the year and the District). Be sure that your District Conference Chair is present and taking notes for your conference in one year.

DGE May Month 20 of 21	☐ Discuss transfer of District files from District Governor.
	☐ Continue to encourage PE to set their goals on Rotary Club Central. All PE must be registered on My Rotary.

DGE June Month 21 of 21	☐ Attend Rotary International Convention (dates vary). Please note, your expenses for the RI Convention are **not** part of your RI Allocation.
	☐ District Governor Installation (dates vary).
	☐ Club President Installations (as invited).

YOUR DISTRICT GOVERNOR YEAR BEGINS ON JULY 1

This will be the best year of your Rotary life…

As District Governor, your authority is an extension of the authority of the Board of Directors of Rotary International. Your empowerment as the District Governor is, however, as provided by those you will be leading. **If you aren't humble going into the experience, the experience will humble you. You will soon discover that 20% of the time you will serve by leading and 80% of the time you will lead by serving.**

You will look back on the opportunity to visit your Rotary Clubs as one of the most rewarding of all your District Governor activities. Your role as District Governor is to further the **OBJECT OF ROTARY** by providing **LEADERSHIP, MOTIVATION & GUIDANCE** to the Rotary Clubs you serve.

Please enjoy every moment of your time preparing for and serving as District Governor.