

Launching your Year of Service as Governor of Rotary District 7500



A road map for what you should expect, and plan for, from the time you are nominated to the end of your gubernatorial year.

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Talk to just about any Past District Governor, and they will tell you that their experience leading up to, and serving as District Governor was one of the most memorable and rewarding experiences of their life. But accepting the nomination carries with it certain responsibilities and obligations about which you need to be aware. A Rotarian who is elected to be District Governor Nominee-Designate—and then fails to follow through on the responsibilities as a future leader in the Governor path can create stress and tension within our District—and embarrassment from far beyond our borders. This guide is designed to give potential future DG candidates an idea of the obligations and duties that accrue to those on the District Governor track before they enter it. Any Past District Governor will be pleased to explain these duties further.

Glossary of terms

AGs (Assistant Governors)

Persons who have previously completed their term as club president and who are picked by the District Governor to assist him or her as the Governor's representative to a group of (typically) four to six Rotary clubs. The AG is responsible for taking the Governor's message, programs, priorities, etc. to the clubs and to assist the Governor in reaching his or her objectives while also bringing feedback from the clubs back to the District Governor.

CLP/DLP

Club Leadership Plan/District Leadership Plan. The suggested organizational plan for clubs and districts made by Rotary International and adopted by District 7500.

Council of Governors

The name for all Past District Governors, along with those in the current governor string, who may be called on by the sitting Governor for advice. The Council of Governors has no official role.

COL

Council on Legislation. Rotary's "parliament" which meets every three years. Delegates are elected from every district in the world and they, together with the Rotary International Board members vote on motions sent to the COL from clubs and districts relating to the bylaws and policies of Rotary International.

DDF

District Designated Funds. Three years after donations have been made to The Rotary Foundation's Annual Fund (and *only* the Annual Fund), 50% of the total contributed from Rotarians and clubs in our District come back to us to spend on our own designated projects. This allocation is called "DDF," and

the decision of how DDF is spent is made by the DG, although the DG often consults with the District Rotary Foundation Chair, and District Grants Chair as to the DDF allocation.

District Foundation (or Rotary District 7500 Foundation)

Separate from The Rotary Foundation, this was established as a 501c3 not-for-profit foundation to allow clubs within our District who do not have their own not-for-profit foundation to accept donations and to give the donor a tax-deduction receipt. The foundation operates essentially as a donor advised fund, and the club which received the donation can designate how the funds are disbursed, within the allowable guidelines of the foundation. For example, a club solicits a local bank for a \$10,000 donation for a local community project. The bank will only make such a gift if it can obtain a tax deduction, which the local Rotary club cannot do. So the bank donates the \$10,000 to The Rotary District 7500 Foundation. The Foundation issues a tax receipt for the gift, and then disburses the \$10,000 to the local club for use in its project.

DG

District Governor. The person elected by the clubs in the District and trained and certified by Rotary International to be Rotary International's representative responsible for the affairs of the District.

DGE

District Governor Elect: The person who has been elected by the clubs of the district to be District Governor in the following year.

DGN

District Governor Nominee: The person who has been elected by the clubs of the district to be District Governor in two years' time.

DGND

District Governor Nominee Designate: The person who has been elected by the clubs of the district to be District Governor the third July 1 from now.

Dues

Our District, and indeed, all of Rotary International pays its operating expenses from dues paid by Rotarians. District dues are due once a year on July 1st. Rotary International dues are due semi-annually on July 1 and January 1 each year.

District Grants

District Grants are funds approved by the District Grants Committee for projects that clubs undertake. To qualify for a District Grant, the club must send two officers to a Grants Training meeting (usually held in the fall), have met its previous-year's goal of giving to the Annual Fund of The Rotary Foundation, and have submitted its application (and final report for previous Grant projects) by the deadline. The current deadline for submitting new District Grant applications is May 15th (for the Rotary year beginning July

1), and those approved grants must have a final report or progress report received by the District Grants Committee no later than April 30 of the year for which the project was approved.

E/MGAs

Endowment/Major Gifts Advisers. A team of highly trained Rotarians who can provide advice on how Districts can facilitate more effective major gift and endowment campaigns and plan major Rotary Foundation fundraising events, such as a Million Dollar Dinner. E/MGAs work closely with RRFs, Rotary Foundation Trustees, the Fund Development committee, and district leaders to develop district-wide or personal plans for cultivating and soliciting major gifts.

EREY

Every Rotarian Every Year. A Rotary Foundation campaign that recognizes clubs that achieve a minimum of \$100 in per capita giving and 100 per cent participation, with every active (dues paying) member contributing some amount to the Annual Fund during the Rotary year.

Fellowship Groups

Groups of Rotarians who become better engaged in their membership experience by joining a Rotary Fellowship Group with others who share the same hobby or interests, such as stamp collecting, golf, yachting, or music.

The Rotary Foundation Trustees.

Essentially the board of directors of The Rotary Foundation, nominated by the Rotary International President-elect and elected by The Rotary International Board of Directors. They are completely autonomous from the Rotary International Board of Directors and their sole responsibility is to manage The Rotary Foundation. Each Trustee serves for four years and the chair serves in that capacity for one year. There are 15 Trustees plus the General Secretary.

GETS

Governor-Elect Training Seminar. Usually two days of workshops and training by experienced senior Rotary leaders just prior to the Zone Institute. During GETS and Zone Institute (see "Zone" below) you will get to know your DGE classmates from across Zones 24 and 32 and will truly feel that you are now on the track to be District Governor. District 7500 pays the expenses for you and your spouse/partner to attend GETS and the Zone Institute.

IA (International Assembly)

A one-week intensive training meeting in San Diego for all District Governors-Elect. Attendance is mandatory for DGEs, and failure to attend all required sessions will render the DGE ineligible to become District Governor. The Assembly is an opportunity for DGE's to meet their classmates from every Rotary district on earth, and it is attended by all current (and most former) Rotary International Presidents, Directors, Foundation leaders, senior staff, and hand-picked training leaders.

Interact

A Rotary-sponsored service club for young men and women ages 12-18. Interact clubs provide young people with the opportunity to develop a range of leadership skills while learning the value of teamwork.

IPDG

Immediate Past District Governor. The person whose term as DG ended on June 30 last.

Major Donor/Arch Klumph Society

A person who contributes \$10,000 or more to The Rotary Foundation is considered a Major Donor. There are four levels of recognition for Major Donors, with very attractive presentation pieces for each one:

Level One Major Donors are those whose cumulative contributions are \$10,000-\$24,999.

Level Two Major Donors are those whose cumulative contributions are \$25,000-\$49,999.

Level Three Major Donors are those whose cumulative contributions are \$50,000-\$99,999.

Level Four Major Donors are those whose cumulative contributions are \$100,000-\$249,999.

When a donor has contributed \$250,000 or more to The Rotary Foundation, he or she is recognized as a member of the Arch Klumph Society (named after the founder of The Rotary Foundation). There are three levels of recognition within the Arch Klumph Society:

Trustees' Circle for donations totaling \$250,000 to \$499,999.

Chair's Circle for donations totaling \$500,000 to \$999,999.

Foundation Circle for donations totaling \$1 million or more.

MOP

Manual of Procedure. The "Rotary Rulebook" containing the rules of how Rotarians and clubs should act in accordance with the principles, bylaws and Constitution of Rotary International.

NID

National Immunization Day. A day when an entire country mobilizes to immunize children against polio.

NJSVA (Vocational Assembly)

More than 30 years ago, the districts in New Jersey began cooperating to jointly run the New Jersey State Vocational Assembly. Usually held in the first week of October, the event brings together three or four notable speakers to talk about issues related to vocational service, such as ethics or volunteerism. The typical format is to have two or three speakers deliver 20-25-minute talks and then a senior Rotary International leader deliver a keynote address over dinner. Each of the (now five) NJ Districts invite clubs in their District to nominate candidates for the Vocational Service Award, and each District then picks one District Vocational Service Award winner. These awardees are recognized at the Vocational Assembly.

Each year, planning rotates so that each District has responsibility for such roles as general chair, finances, secretary, promotion, etc.

OD

Official Directory. The annual directory published by Rotary International that contains the listing of names & contacts for every club, every District, and every major Rotary International and Rotary Foundation leader and committee. It is available free online at Rotary.org if one has a My Rotary account.

PE

President Elect.

PHF/PHS/PHSM

A Paul Harris Fellow is the recognition given to a person who donates (or in whose honor and name a donation is made) of \$1,000 or more to The Rotary Foundation. The donation can be designated for use in PolioPlus, the Annual Fund, or the Endowment Fund of The Rotary Foundation.

A person who pledges to donate \$1,000 or more each year to the Annual Fund, approved Global Grants, or PolioPlus is a member of the Paul Harris Society.

A person who contributes \$100 or more to The Rotary Foundation with the promise of future contributions towards the goal of \$1,000 is known as a Paul Harris Sustaining Member.

PETS (MAPETS).

To become a Rotary club president, one has to attend a Presidents-Elect Training Seminar (PETS). In line with many other districts around the country, District 7500 now participates in a multi-district PETS called MAPETS (Mid-Atlantic PETS), which includes two Districts in Southern New Jersey and three in Eastern Pennsylvania. MAPETS is usually held from a Friday morning through Saturday afternoon in late February or early March. There is usually an optional session on Thursday afternoon or evening, and by attending that and staying over on Thursday night (at the PE's expense), the attendee won't have to worry about fighting rush-hour traffic to make the 8:30AM start on Friday.

Planning for MAPETS is conducted by an executive team elected by the participating districts, and the DGEs of those Districts. Each District is given roles for which they are responsible, such as registration, protocol, etc.

It is the responsibility of the DGE to ensure that his/her presidents-elect and AGs-elect know well in advance their obligation to attend the entire PETS program and commit to doing so. A president-elect who finds it impossible to attend MAPETS may attend any other PETS in the country and still qualify to become club president.

The fee for presidents-elect to attend PETS is automatically billed to each club, and in our District, we include the Friday night hotel cost in this fee. (If they arrive on Thursday, that night's hotel is on them).

PRID

Past Rotary International Director.

Rotaract

A service club for young men and women ages 18-30. Rotaractors address the physical and social needs of their communities and promote friendship through service. Rotaract clubs are sponsored by Rotary clubs, but they are self-governing and self-supporting. This gives the members an opportunity to develop leadership and professional skills.

RAG

Rotary Action Groups help Rotary clubs and districts plan and carry out community development and humanitarian service projects in their area of expertise. The groups are organized by Rotarians who are proficient, and have a passion for service in a particular field such as AIDS and family health, Blindness prevention, Hunger and malnutrition, Literacy, Peace, and Water and Sanitation.

Rotary Brand Center

A section on the Rotary.org Website that gives examples of Rotary logos and emblems, and gives tips on how to deliver a clear, compelling message that conveys the Rotary "voice."

Rotary Club Central

Allows club leaders to enter and edit goals and achievements in Membership, Service, and Foundation giving. District leaders are also able to view and edit goals for clubs in their district. Club and district leaders have the edit access for a 3-year period (their year of service plus 12 months before and 12 months after office), and all Rotarians can view their club's goals at any time.

Rotary Community Corps

Groups of non-members in the community, sponsored by their local Rotary club, who help the Rotary club undertake service projects. They are not Rotarians, and pay no dues.

RLI

Rotary Leadership Institute. An independent organization recognized and acknowledged by Rotary International comprised of Rotarians, which offers excellent leadership training ranging from introduction courses for new Rotarians up to accreditation as an RLI/PETS faculty trainer.

RI

Rotary International. Individuals are not members of Rotary International, Rotary *clubs* are the members. Rotary International is headquartered in Evanston, Illinois, just north of Chicago.

R.I. Board

Rotary International is governed by a Board of Directors of 19 people (plus the General Secretary). The Rotary International President and President-Elect are automatically members of the Board. The remaining 17 Directors are elected by their Zones (see "Zone" below), with two Zones each responsible for electing one Director.

RIBI

Rotary International in Great Britain and Ireland. By the time World War I began in 1914, Rotary had spread across Great Britain and Ireland. Yet with the war, communications became almost impossible between those clubs and Rotary headquarters in Chicago. The R.I. Board approved the formation of a separate body to govern the clubs in England, Scotland, Wales, and Ireland and called it the British association of Rotary Clubs. The Rotary International Board only intended it to be for the duration of the War. But when hostilities ended in 1918, the clubs in Britain and Ireland had become accustomed to local control that they resisted any moves to disband BARC and return to oversight from Chicago. With the advent of peace, Rotary International saw a dramatic expansion of Rotary clubs across the world, and at the 1922 R.I. Convention, delegates approved the new Rotary International Constitution, which provided for "territorial units" to be created, whenever 25 or more clubs were formed within one country. The British & Irish clubs immediately applied for, and received, permission to have BARC (renamed RIBI in 1924) designated as a territorial unit. No other group of clubs so applied, and the Constitution was thereafter changed to eliminate territorial units. But RIBI was already grandfathered! One hundred years later, RIBI is unique in the Rotary world. Clubs in Britain and Ireland are members of *both* RIBI and R.I. They elect directors to RIBI; RIBI has its own leadership and administration offices, and yet there is representation from RIBI on the Rotary International Board of Directors (and frequently the Foundation Trustee Board).

ARCs, ARRFCs, RCs, RRFs, RPICs

Rotary Coordinators. Just as the District Governor has AGs (Assistant Governors) to be the liaison between clubs and the governor, so the Rotary Coordinators are the Governor's (and District's) "go-to" resources when they need answers or advice on matters concerning Rotary International or Rotary Foundation programs and policies. There are several categories of coordinators:

- Rotary Coordinators (RCs) and Assistant Rotary Coordinators (ARCs) are there to provide ideas and best practices of Rotary programs.
- Regional Rotary Foundation Coordinators (RRFCs) and Assistant Regional Rotary Foundation Coordinators (ARRFCs) are there to assist specifically with increasing support for and awareness of The Rotary Foundation. For example, a District Foundation Chair wanting ideas on how to be more effective at teaching Rotarians how to include The Rotary Foundation in their estate plan could contact their ARRFC for ideas.
- Rotary Public Image Coordinators (RPICs). Promote Rotary's public image and act as a resource for clubs and districts wanting to enhance the image of Rotary in their local media and community.

SAR

Semi-Annual Report. The membership report each club must make to Rotary International on July 1 and December 1 of each year.

TRF

The Rotary Foundation. Rotary International is the umbrella organization under which Rotary clubs fall. The Rotary Foundation is the affiliated (but separately governed) charitable foundation that collects and disburses the funds to do the good work for which Rotary is known around the world. The Rotary Foundation is headquartered at One Rotary Center in Evanston, IL.

Zone

The entire Rotary world is divided into 34 Zones, or, put another way, each one of the more than 500 districts is on one of 34 Zones. Two Zones usually work together to hold an annual Zone Institute (rather like a small Rotary International Convention, attended by R.I.'s top leadership and many current and past-service governors and directors). Those two Zones then elect a member of the Rotary International Board of Directors every two years. District 7500 is a member of Zone 32, which encompasses Bermuda and the northeastern United States from New Jersey through Pennsylvania, New York State and New England to the Canadian border. We are paired with Zone 24, an enormous geographic area which extends from the tiny French islands of St. Pierre et Miquelon (off the Atlantic coast of Canada), across the entire nation of Canada, all of Alaska, and the Russian Federation from Siberia west to the Urals. Immediately preceding the Zone Institute is two days of training at the "Pre-Institute," which should be considered mandatory attendance for DGEs and is very strongly urged for DGNs.

Zone Directory

Then annual book published by RI for the zone pairing. Your book will contain contact information for the Zone Governors for Zones 24 & 32 and the District Governors for Zones 24 & 32, as well as a history of Zone Institutes.

A Brief History: from Paul Harris to District 7500

For three years after Paul Harris founded Rotary in 1905, there was only one club: the Rotary Club of Chicago (which has long-since used the moniker “Rotary One.”) In 1908, the second Rotary club was formed, in San Francisco, and there followed a rapid expansion along the West and East Coasts until in 1910, the first Convention was convened by the then-16 clubs, and from this assembly came what we know today as Rotary International.

Just two years later, Rotary had grown to 50 clubs, and so those clubs were organized into the “Eastern Division” and “Western Division.” Despite the World War that was raging in Europe, Rotary continued to expand, and so it was Arch Klumph (who in 1917 was the person behind the idea of what we now call The Rotary Foundation) who persuaded the Rotary Board in 1915 to divide clubs into “Districts,” with each District overseen by a “District Governor.” All Rotary clubs in New York and New Jersey were placed into the “Second District.”

With the War ending in 1918, Rotary added more clubs, and so New Jersey was divided in two. Clubs located from Trenton and north were placed in District 3 with those clubs in New Jersey south of Trenton becoming the “Fifth District,” together with clubs in Pennsylvania, Delaware, Maryland, and Washington, DC. That number was changed to the “35th District” in 1922, and in 1925 it was again renumbered to the 50th District, although the territory was the same.

From 1937 until 1970, the District only included clubs in Southern New Jersey and Delaware, and we were known as District 184 (1937-1949), District 272 (1949-1957), and District 764 from 1957, although in 1970, the clubs in Delaware became a separate District. As clubs and district multiplied the world over, Rotary International added a “0” to district numbers, thus making District 764 now 7640, a number which it carries to this day.

Meanwhile, Monmouth and Ocean counties were placed in renumbered Districts also. Having been originally in District 3, in 1922, they became District 36, and in 1937, District 183. In 1949, the district was again renumbered and became District 271, and then in 1957 it became District 751.

In July 1991, RI added the fourth digit to district numbers, and so Districts 751 and 764 became (and remain) 7510 and 7640, respectively.

Rotary had grown so much that by the 1990s, some of the districts in New Jersey were very large. District 7510 had 2,961 members in 71 clubs and District 7640 had 2,482 members in 65 clubs in the 1993-94 Rotary year. It was time to make the districts more manageable and created a new district!

On July 1 1994, District 7500 was formed by taking Burlington County from District 7640 and Monmouth & Ocean counties from District 7510. William “Bill” Skidmore of Point Pleasant Boro was the first District Governor of District 7500 in Rotary year 1994-95.

Governor Bill then had the challenging task of assimilating 42 Rotary clubs with 1,881 Rotarians into a cohesive group separated by a massive land mass, i.e. the Pine Barrens and three military bases. His smiling face and pleasant personality succeeded in setting the groundwork for succeeding District Governors to build upon. Bill liked the job so much he came back in 1999-2000 to serve again.

During the past twenty one years, District 7500 has lots to be proud of. Our fourth Governor Michael Colasurdo 1997-98 went onto become an RI Director and Treasurer. Pamela Maguire became the first female DG in 2003-04 and since then five more have met the challenge. The Gift of Life Foundation was created in 1998 and continues to provide aid and assistance to children worldwide with heart and lung deficiencies. Twelve of our 21 District Governors have been sponsored by the following five clubs, Pt. Pleasant Boro-2 (Bill Skidmore #1 & #6), Forked River -2 (Dick Ritchie #2 and Dan Cortese # 15,) Brick-2 (Mike Colasurdo #4 and Karl Drzymala #7), Matawan -2 (Gerald Donaghue #8 & Joan Vas #19) but Red Bank has the lead with 4 (Liutas Jurskis #5, Nick Michals #12, Horton Hickerson #17 and Harriett Primack #21).

New Jersey has a unique position in the Rotary world by being the only state which gathers every district within its boundaries to convene a conference dedicated to Vocational Service. The five New Jersey districts hold the NJ Vocational Assembly every October, at which a winner of each District's Vocational Service Award winner is honored, and where acclaimed speakers, usually including the highest RI leaders, deliver addresses.

Internationally we have participated in Group Study Exchanges with Districts in Japan, Korea, Italy, Austria, Australia, Brazil, Pakistan and India. In 1998 we had our only Friendship Exchange with South Africa. We are active in the Peace Scholar Program. We support international Disaster Relief via "ShelterBox" with more than \$275,000 raised within the past ten years. After Superstorm Sandy devastated parts of New Jersey in 2012, District 7500 created a Disaster Relief Committee, which continues to provide tangible assistance to victims of disasters in and near our District.

Under the Matching Grant program we joined forces with a Brazilian District to build a traveling medical center. We did a Humanitarian Grant with Oberpullendorf Rotary in Austria to replace washing machines at a Children's Hospital in Mukatchevo, Ukraine and continue to provide funds for dried milk as a dietary supplement. We have participated in several Water Grants in South America and one currently pending in Africa.

The District has made the Rotary Foundation a primary focus throughout our existence with heavy contributions to both the Permanent and Annual fund as well as to Polio Plus. Becoming a Paul Harris Fellow is a goal for which every Rotarian strives. 11 clubs hold the distinct honor of 100% Paul Harris members. There are 32 Paul Harris Society members, 29 Major Donors, 62 Benefactors and 2 members of the Arch Klumph Society.

More than 35 Interact clubs have been formed during our 21 year history, serving their local communities and internationally. RYLA has become the BEST program in the system under David GoWell. Middletown, Pinelands, Riverside Delran Delanco, Wrightstown and Beverly Clubs have given up their charter while Great Bay, Medford Sunrise and the eClub have been added.

T-33 months. Your club nominates you.

Congratulations! In accordance with our District Bylaws, your club has nominated you (having previously completed at least one term as a Rotary club president) "in the form of a Resolution adopted at a regular meeting of the club and certified by the club's secretary."

This nomination was sent to the District Nominating Committee. This committee is chaired by the immediate Past District Governor. Our District Bylaws state that no later than October 1st of the current year, the sitting Governor "shall appoint the remaining members of the nominating committee, which shall consist of seven Past Presidents, of whom three (including the chair) shall be Past District Governors." Our Bylaws provide for equal representation from all three counties, and for no member whose club has a nominee to have representation on the committee.

Following interviews with each nominee, the Nominating Committee shall select one candidate and the Chair shall notify the District Governor of the committee's decision. If you are that candidate, you enter a "quiet period" for at least two weeks, refraining from making speeches at other clubs or doing anything that could be construed as campaigning. You should not announce to anyone that you have been selected by the Nominating Committee. The District Governor will then notify in writing each club in the district of the decision of the Nominating Committee, and those clubs have two weeks following that notification to object to the decision or to submit another nomination. (Thus the "quiet period" when you should avoid any appearance of campaigning).

If no other nominations or objections are launched by the deadline, the District Governor will declare the decision of the Nominating Committee to be final and the candidate to be duly elected as District Governor-Nominee Designate.

What comes next? First, it is now official: the alphabet soup begins! You are now a DGND!

Yet the months leading up to July 1st of next year may seem a little strange. You are so far from becoming Governor that you might ask, "How much planning can I do at this stage?" You have no budget, no team, no real duties.

Perhaps the best advice is to *OBSERVE!* Take a notepad with you everywhere. When you are at a meeting of another club, ask a couple of past-presidents questions such as, "What things did the *best* district governors do, in your opinion?" "What could a DG do to help you the most as a club?" Similarly, when you are with PDGs, a good question might be, "What do you know *now* that you feel would have helped if you had known prior to becoming District Governor?" You will soon be invited to district staff meetings, and may even ask the DGE or DG if you could share long car rides to meetings, or to shadow them on club visits or multi-district meetings. Takes notes on things you felt were best practices, and also things you think could be improved.

One of your first appointments will be your District Trainer. This should be a person who will be a PDG who has the right demeanor to be an effective communicator and trainer in your DGE/DG year.

Things you should plan on attending:

- District staff meetings
- Mid-Year Assembly
- Mid-Atlantic PETS. (You won't have an official role, but can volunteer as a Sergeant-at-Arms)
- District Conference
- District Changeover
- Planning meetings for NJ State Vocational Assembly.

Finances during your term as District Governor-Nominee-designate:

You have no budget from Rotary International or the District. However, District 7500's Bylaws provide for the DGND and their spouse/partner to attend the District Conference and the Zone Institute (including the Pre-Institute) and be reimbursed from the District budget.

T-24 months: You are District Governor-Nominee.

By now you have had 6-8 months to think, plan, observe, and talk to others about your year. You will have three main considerations this coming year:

1. Start planning your District Conference.
2. Become involved in the planning process for the NJ Vocational Assembly and MAPETS.
3. Start outlining the rough themes or ideas you might want to include for your year.

District Conference:

Yes, you are almost three years away from when you will hold your District Conference, but believe it or not, many hotels will tell you even now that they are full because other conventions have booked them even longer in advance.

So question one might be: "What sort of conference do I want?" One could simplify the answer by putting the conference into one of two columns.

The first is a "commuter conference," probably held in our District. This way, people could avoid the expense of two night's hotel. Perhaps some would come only for the Friday dinner, others just for Saturday's plenary sessions and lunch. The advantages to this type of conference are that it offers maximum flexibility for today's busy people, and cost can fit each attendee. The disadvantage is the lack of "fellowship" when you as Governor don't have the same big group all together for the entire conference. Secondly, a hotel can often be persuaded to comp the meeting rooms (and negotiate a lower food price) if you give them a large block of sleeping rooms. It can also be a logistical headache to plan things like badges for X-many people for this meal and Y-many for the next one, etc.

The second option could be called a "destination conference," where you "sell" the allure of going away for an entire weekend to a nice hotel in a desirable setting. Obviously, the disadvantage is the cost: now you have two night's hotel stay to pay for, and the challenge that a Rotarian will skip the entire conference if, for example, they have a conflict on the Saturday.

So which is the right choice? Only you can determine that. District 7500 has had expensive destination conference, such as a cruise to Bermuda. We have had "a la carte" conferences within the District. And both had their raving fans and their critics! Talk to your club—whose help you will certainly need. Talk to people whose opinion you value. "Would you attend a commuter conference in Mount Laurel or Tom's River? Would you spend \$X on a conference in a lovely hotel in Washington or Williamsburg (or wherever)?" A rule of thumb might be to draw a line that represents a three-hour drive time from the center of the District. Then decide which destinations would interest you within that area. Talk to PDGs who have had *their* District Conference in those destinations. Call the DG in whose District those towns sit and ask them for advice of hotels that might work well for you. Maybe some of them are managed by Rotarians!

Look at the calendar for the spring of your gubernatorial year. Stay away from national and religious holidays, Mothers & Fathers Days, conflicts with other Rotary events (such as the International

Convention). Now you are probably down to just a couple of weekends, so pencil those dates in. The first thing a hotel will ask you is "What are your dates?"

When you blitz the possible hotels with calls, ask them to send you their meeting planner's guide. Look at the size of the meeting rooms. Plan what you want your conference to look like. Start with Friday (assuming it begins then). What comes first? A plenary session? For how many people? Seated "theatre style" (without tables) or "classroom style" with tables? How big an area will you need for registration? Will you need a room for hospitality, often called a "House of Friendship"? Do this for each part of each day of your conference. What sort of AV equipment will you need? If you do not put this into your negotiation with the hotel up front, it can cost you *thousands* of dollars later. Many hotels have restrictions on bringing in your own equipment such as screens and AV. Most hotels prohibit bringing in your own food and liquor, so negotiate this up front before you promise clubs hospitality suites.

When you have eliminated the hotels in which you have no interest, plan site visits to the others. If they don't offer you complimentary rooms for your site visit, ask. Their sales manager will show you sleeping rooms (look for the worst, or smallest rooms, not just the suites that they want to show you!) along with the meeting and banquet space. At the very least, take your district conference chair (whom you should have appointed by now) and one or two other trusted advisors with you. Negotiate as hard as you can for the best possible rate. The hotel will have "hard" costs, such as the meal price, or room rate, and "soft" costs, such as meeting room rental. After you have obtained the lowest price you think you can get, then work on getting them to eliminate some of their soft costs. For example, instead of one free sleeping room for 50 paid guests, try for one-per-40. They may give you the impression that the price is the price, but you need to remember, *everything* is negotiable: they can comp meeting room costs, reduce meal prices, throw in light hors d'oeuvres for your cocktail party—you just need to negotiate and let them know you are considering other sites. You can see now why you will have more bargaining power the further out you talk to the hotel. One year from the conference, when the hotel is already pretty full, you will have almost no negotiating power. But three years out, when they are empty, you can save hundreds or thousands of dollars.

You have now narrowed it down to a few strong possible destinations. It's time to crunch numbers. You might want to set up a spreadsheet. Across the top, design columns for each hotel. Down the left side write in every meal, every room night and every expense you can imagine. **DON'T OVERLOOK TAX AND SERVICE COSTS!** Sales tax may be 7%, but many cities have a hotel tax than can be 11-15% on top of your room charge. Service charges of 18-21% are not uncommon. So if a hotel tells you a dinner will cost you \$35, the *actual* cost to you could be \$44.10 when you add 7% sales tax (\$2.45) and 19% service charge (\$6.65). Will you be bringing table centerpieces? Professional entertainment? Giving freebies to speakers or some of your conference planning team? Printing? Badges? House of Friendship refreshments and snacks? Giveaway bags? Add those hard costs up and divide them by a conservative number of paying guests and add that per-person cost to your spreadsheet.

Remember, your District Conference is supposed to be self-sufficient. There is no District budget allocation to underwrite the conference. Rotary International will pay for the travel expense of the Rotary International President's Representative, but the cost of his/her room & board comes out of your

conference budget. Rotary International *will* reimburse you for your mileage and travel costs to find a conference site after July 1st of the year you become Governor, so keep track of those expenses now and put them somewhere safe so you can submit your claim later.

One final important point. It is considered improper for you to be promoting *your* District Conference until the District Conference of your immediate predecessor. Your goal right now is to *plan* yours, and generally keep your excitement to yourself. There are two people ahead of you who have their own conferences to promote first, and you should be committed to doing everything you can to help them attract attendance to *their* conferences before you begin marketing yours.

NJ State Vocational Assembly:

The planning of the Vocational Assembly involves the DG, DGE, and DGN. The District Governor is the only person with voting power on the multi-district planning committee, although he/she can pass that power on to the DGE or DGN if she/he is unable to attend a meeting. District 7500 looks to the DGN to be the primary person to promote ticket sales and attendance from the clubs in our District to the Assembly. There may be other roles assigned by the planning team to the DGN.

Zone Institute:

As defined elsewhere in this Road Map, Our Zone (Zone 32) is the association of many Districts from New Jersey west to the Buffalo area and north to the Canadian border. Each year, the Rotary International Director who is elected from Zones 32 and 28 (all of Canada, Alaska, and western Russia) hold a Zone Institute, preceded by a two-day Pre-Institute. You should plan on attending both, as this will be your first introduction to your classmates for your DG year, and you will benefit enormously from the networking and training offered. Our District pays for your hotel, registration, and travel to Zone Institute and Pre-Institute.

Mid-Year Assembly:

District 7500 delegates to the DGN the responsibility of planning the Mid-Year Assembly. However, you must recognize that you are part of a three-legged stool in this regard! The DG has full responsibility for all the affairs of the district, and must be consulted before any final decisions or commitments are made. Furthermore, the Mid-Year Assembly is by definition the midpoint of the current Governor's year (with six more months to go and many goals she/he wants accomplished), and the very beginning of the DGE's training for his/her year. Indeed, the DGE often schedules the Pre-PETS meeting on the same day and at the same location as the Mid-Year Assembly.

So the suggested protocol would be for the DGN to ask the DG and DGE if they have any special needs or suggestions as to the date, location, and emphasis of the Mid-Year Assembly. If, for example, one of them were to say "I really want to make the entire MYA about Public Image this year," make sure the other person concurs. Ask if they have any ideas for speakers, format, workshop topics, etc. Conduct your own research and arrange to meet the DG & DGE to present your rough plan. You will have already negotiated with two or more venues to get pricing. When the three of you have reached agreement on the date, location, pricing, topics, speakers, etc., go ahead and line up the logistics, design a flyer, tentative agenda, etc. Remember, nothing should be signed committing the District and nothing should be sent out to clubs without the DG's approval.

Things you should plan on attending:

- District Changeover
- District staff meetings
- Planning meetings for NJ State Vocational Assembly.
- NJ State Vocational Assembly.
- Zone Institute and Pre-Institute.
- Planning meetings for PETS
- Zone Institute
- Thanks for Giving Dinner
- Mid-Year Assembly
- Pre-PETs (at discretion of the DGE).
- PETS
- District Conference
- Rotary International Convention

Finances during your term as District Governor-Nominee:

You have no budget from Rotary International or the District. However, our District MAY have a small amount in the budget to reimburse DGNs for their Rotary-related expenses. Speak to the current DG or District Treasurer and be sure to keep your receipts for reimbursement. District 7500's Bylaws provide for the DGN and their spouse/partner to attend the District Conference and the Zone Institute (including the Pre-Institute) and be reimbursed from the District budget.

Keep track of your mileage and travel expenses for planning your District Conference for reimbursement from Rotary International once you become Governor.

T-12 months: You are District Governor-Elect.

By now, you should have contracted with a hotel or meeting facility for your District Conference and should have appointed a conference planning team. You should have begun sketching out the main goals and ideas for your year as DG.

One District Governor, when asked what one thing she wished she had done in advance of becoming Governor, said, "I wish I had spent more time visiting the clubs outside of my immediate home area long before I became DG." This is your opportunity to do that. Get outside your comfort zone. Make up at, say, one club every two weeks just to get the "feel" of how they "Do" Rotary.

You should have developed a strong rapport with the new District Governor, asking how you can support his/her programs and goals. He/she will be making official visits to every club in D7500 over the period beginning July 1st. Ask if you can accompany her/him and just sit and observe (bring your notebook!) how she/he communicates, engages the Board and the club, how she/he delivers the Governor's address. Is it a formal speech, or more of a list of goals, or a Q & A session? How did the host club members respond? Were they engaged? Bored? Hostile? Inspired? You should never try to be a clone of another Governor, but it is interesting to watch the body language and see how the DG's communication is received.

In the summer of your DGE year, you will receive from Rotary International an email asking you to prepare a budget request for your official stipend for your DGE year. At first, this can be confusing, but it is critically important that you complete and submit this on time. Rotary International will reimburse you for certain expenses, once you become Governor. That list will be included in the email, for your guidance here, it includes such expenses as:

- Mileage and hotel expenses for your official club visits and planning meetings for your District Conference, PETS, etc.
- Training costs for your AGs and certain other District leaders, such as Pre-PETS.
- Printing costs for stationery, business cards, etc.
- Postage.

This is a *budget* estimate, not a final accounting. So you might want to talk to a previous governor who lives near you to get an estimate for the mileage. Go through the list of allowable expenses and submit your best-guess estimate. At some future point this year, Rotary International will come back to you telling you the amount they approve. On (or shortly after) July 1 next year, Rotary International will send you 70% of the amount they approved, and this will be dealt with in the section for District Governors.

NJ State Vocational Assembly

Always held in the first week of October, the NJ Vocational Assembly is a joint venture between the five New Jersey Rotary districts. Each year, the planning and execution roles are rotated, so one year our district may be the General Chair, the following year the Secretary, the following year, responsible for

publicity, etc. Planning for the Vocational Assembly begins early in the calendar year while you are still the DGN, and you should make every effort to attend each of the meetings so you can fulfill our district's responsibilities. Our District Governor typically asks the DGE (that's you now!) to coordinate the nominations for the Vocational Service Award from our clubs immediately after July 1st. A committee is then appointed, not to include members from any club that has submitted a nominee, and they choose a District 7500 Vocational Service Award winner. That person receives his or her award at the Vocational Assembly.

GETS/Zone Institute:

Usually held in late September or early October, you should consider attendance at GETS to be a mandatory addition to your schedule. You will have two+ days of close interaction with other DGEs from across the Northeastern US, Canada, Alaska, and Russia, and will derive enormous benefit from the training and ideas. You (and your spouse or partner) should register for GETS and Zone Institute as soon as possible, book your travel and hotel, and submit your receipts to the District Treasurer for reimbursement.

Planning your leadership team:

By mid-December, you will need to provide the MAPETS trainers with the names of your club presidents-elect and your own District Trainer and AGs. Assistant Governors are usually asked to serve three-year terms, but they always serve at the invitation of the Governor.

You might want to take the current District organization chart and sit down with the current DG to ask how effective the people are in their current positions. If you have established the relationship you should have by this point, the DG will be happy to give you confidential advice as to which assignees he/she has been disappointed with, and which have performed their duties with distinction. The DG can also provide you with names of club presidents (or past presidents) from around the district who have impressed him/her during the official visits, and who might be good leadership candidates for your team.

Once you have established at the least your District Trainer and AGs, confirm their willingness to serve next year and then pass on their names and contact details to the MAPETS planners.

PETS Planning:

You will probably have been attending MAPETS planning meetings since early fall. Each of the five Districts that convene MAPETS is given a specific assignment (such as registration, venue, protocol, program book, etc.). As DGE, you are the primary representative of our District to MAPETS. YOU have the vote (not the DG), because the purpose of this PETS is to train *your* year's club presidents. Each District is usually asked to provide approximately five Sergeants at Arms to MAPETS. You can check with the current DG for the names of those who served previously as many of them are experienced and like to volunteer each year.

Attendance at PETS is essential for presidents-elect (and strongly encouraged for AGs-elect). By December at the latest, you should ask the DG to publish the dates for PETS in the District newsletter, on the Website, and in communications to club presidents/presidents-elect.

In mid-fall, Rotary International will have sent you several boxes containing their training manuals for club presidents. Count them to determine if you have sufficient quantities for each club president-elect. You will later decide what other printed materials you want to include in the binder that each of our D7500 presidents-elect will receive. You could decide to simply include the booklets that Rotary International provided. You might elect to print out instructions on how to register their club's goals on Club Central, or what the requirements are for obtaining a District Grant. YOU decide! Your District Trainer, District Rotary Foundation Chair, and current or past District Governors (as well as your new friends in your DGE class) can make valuable suggestions. The actual three-ring binder is sometimes provided by the PETS trainer, and sometimes you need to buy them yourself (and be reimbursed by the District). Just ask at any MAPETS planning meeting. Some DGEs hand out their binders to Presidents-elect at PETS, but most give them out at Pre-PETS—with the admonition not to forget to bring the binders with them to PETS!

In early February, you and the other four DGEs will accompany the MAPETS planners on a site visit.

International Assembly:

Early in the fall of your DGE year, you will receive an invitation from Rotary International to register for the International Assembly (IA). The IA is now held in San Diego in January and runs from Sunday afternoon through Friday evening and brings together the DGE and their spouse/partner of every District in the Rotary world for an intensive week of team building, training, learning about Rotary policies and best practices, and inspiring speakers. Rotary International will pay for your airfare, hotel, and all meals for the International Assembly, and also those for your spouse or partner. You will be given the option of going out for a few personal days prior to, or following the IA provided the airfare costs no more for you to do that, and obviously any hotel & meal costs for these extra days must be borne by you.

You literally cannot become DG on July 1 if you do not complete your IA training—and don't even think about skipping a couple of workshops so you can sunbathe beside the pool! This is a serious commitment, and Rotary International will tell you to pack your bags and fly home if you do. Rotary invests more than \$40,000 to train its District Governors, and our obligation is to honor that commitment to us. But why would you *want* to miss this incredible opportunity to meet and greet fellow DGEs from every culture around the world, to get to know the Rotary International President and Board of Directors, and those who have previously served as Rotary International's highest leaders. Do not miss the deadlines when emails ask you for such things as your photo and bio. It would be embarrassing to arrive in San Diego only to find the directory page for District 7500 blank! The IA planning staff in Evanston have an enormous task putting this event together every year, and you are just one of 550 DGEs attending; they don't have time to babysit you and send you umpteen reminders. Every Rotary International President chooses a theme for his year. This is kept a close secret until he reveals it at the opening session of the International Assembly. There exists also a tradition where Rotary International Presidents choose a theme jacket and tie/scarf. Usually, DGEs are able to buy the presidential theme jackets at the IA from one of the licensed vendors that exhibit there. DGs are

expected to wear their theme jackets, ties or scarves during all official club visits and district events in their gubernatorial year. The jackets are often a color that will forever identify PDGs as members of a specific year, or "class." On the other hand, there has been a shift among recent Rotary International Presidents away from (for example) yellow or turquoise jackets that have limited use after the DG's year has ended, to more functional, neutral colors. The 2015-16 RI President told his DGEs to simply buy a navy blue blazer of their choice and use that as their theme jacket. It will be interesting to see how future Presidents follow this precedent. That's where the theme scarf and tie comes in. You will be given one theme tie (men) or scarf (women) at the International Assembly. Rotary International is the only source of the official tie & scarf. You can buy additional ties & scarves for a donation to The Rotary Foundation. Some DGEs buy one or more scarves/ties and have the Rotary International President-Elect autograph them, and the DG auctions off these items to raise money for The Rotary Foundation in their gubernatorial year.

It is also a tradition for many of the DGEs to exchange little mementos with the classmates they meet at the IA. These could be as simple as a pin shaped like one's District and attached to your Rotary business card, to elegant handmade teak letter openers from Thailand or colorful fabric bookmarks from an African district. So well before you leave for San Diego, you need to decided what to do in this regard. You could be embarrassed if dozens of your classmates keep presenting you with little souvenirs of their district and all you have is a business card! On the other hand, if you cannot think of an appropriate "chachka" to give away, you could make a donation in their name to The Rotary Foundation and have this printed on the back of your cards that you will give them.

Pre-PETS:

You and your District Trainer have complete control over this event. It has made sense to many DGEs to run the Pre-PETS on the same day as the Mid-Year Assembly. You will not want it prior to your attending the International Assembly, because you will surely want to share some of your excitement about the next Rotary year with your presidents. Yet if you go too far into February, you will run up against PETS. A typical Pre-PETS lasts for two hours and includes you, your District Trainer, your Presidents-elect and AGs-elect, and maybe one or two other speakers, such as your District Foundation Chair. It is a time for you to bond with your Presidents and AGs, to briefly outline the "big picture" for your year together, and to prepare them for PETS. The cost of Pre-PETS is covered by the budget you submitted to Rotary International back in the summer.

PETS

In late February or early March, you, your District Trainer, your AGs-elect, and your Presidents-elect will head off to Mid-Atlantic PETS from Thursday evening through Saturday afternoon. As noted previously, the cost for PETS is automatically billed to each club every year as part of their District dues obligation. The hotel cost for each attendee is paid by our District, although the optional Thursday night stay is the responsibility of the President-elect, and is usually picked up by their club.

There are four valuable components to PETS:

1. Training on a variety of topics that will help Presidents-elect become better leaders, more knowledgeable of Rotary procedures, programs, and ideals. These sessions are generally

arranged by the size of club, so PEs from all five districts will be grouped by small, medium, and large clubs for effective networking and idea-sharing.

2. Breakout sessions specific to each District, where you as DGE will be able to inspire your PE's with your goals and plans for the next year and develop them into your team. So you and your District Trainer will want to plan exactly what messages you want to convey during the District 7500 breakout sessions you will lead.
3. Inspiring keynote addresses from some of the top Rotary International speakers in our Zone and even from Rotary International.
4. The networking with other PEs and with past Rotary leaders that comes with gatherings such as PETS, when hundreds of motivated and experienced Rotarians come together for a common purpose.

As DGE, you are part of the planning team for Mid-Atlantic PETS and will be given certain responsibilities and duties. It is extremely important that you fully participate in the planning meetings held (generally monthly) from about September until just before PETS. You will be asked, for example, to provide a certain number of Sergeants-at-Arms, Aides for speakers, screens & projectors, and certain administrative duties.

Several weeks before the event, the executive planning team will provide details of the three-ring binders that each President-elect will receive. There are several tabs in those binders, some of which will have printed materials provided by the planning team and common to PEs from all districts. There will also be one tab for your district, and you and your District Trainer should decide well in advance what items, specific to our district, you would like to include behind that tab. For example, your district events calendar, district leadership team, goals, etc. would ideally be items for you to share with your presidents-elect. Be sure to order any materials you need from Rotary International well in advance, as the most popular items tend to be backordered as these dozens of multi-district PETS approach. You can peruse Rotary.org or Shop.Rotary.org for ideas. About two weeks prior to PETS, you need to recruit volunteers to assemble all the binders and insert the materials behind the appropriate tabs. This is no small task, so plan well in advance!

Call, call, and call again to your PEs during January and February. You will be surprised at how many people listed as "President Elect" in the current Governor's directory are no longer the club's PE! Because District 7500 includes the Friday night hotel in the cost of PETS, you should carefully record the names of all PEs who indicate they will attend onto a rooming list, and then you should provide both the hotel and our District Treasurer with a copy of that rooming list so we can both assure each PE they have a room, and that our District can know exactly how much to pay the hotel.

Occasionally, a PE will tell you he or she cannot attend PETS because of travel plans. R.I. policy states that a person cannot become club president without attending PETS. In reality, it is very difficult to tell that to a club. However, you have an alternative! The PE can attend ANY PETS, so you should invite them to pick one (perhaps the North Jersey PETS), to register for the PETS and hotel, and then present you with the receipt and our District Treasurer will reimburse them.

"Failure to Plan is Planning to Fail!"

You cannot believe how your year will sneak up on you! If you wait until you become Governor to plan your year, you will be in a heap of trouble. You should be able to plan almost your entire year by the

spring of your DGE year. You already know when most clubs meet, so there is no reason you cannot put together a tentative schedule of official visits to distribute to your presidents-elect at Pre-PETS. Give them the opportunity to take that back to their clubs and clear the calendar for your visit. Then look at the current Rotary calendar year: you can go ahead in the winter or spring of your DGE year and pick dates and locations for the Rotary Foundation Dinner, training assemblies, staff meetings, grants training seminars—there is no reason to wait until June or July to pick those dates! The more you can put on a sheet of paper headed “Save the Date,” to distribute at PETS and to your team, the better prepared everybody will be.

Club Central

Rotary International now has an excellent portal where each Rotarian, each Rotary club, and each District Governor can enter their profile, club goals, and check their progress. Presidents-elect are starting out on a journey, and just as they would not set out on a physical journey without a road map, nor should they embark on their Rotary journey without knowing what they want to accomplish during their presidency.

Not all club Presidents-elect are knowledgeable with technology or with Rotary Club Central. As DGE you should become very comfortable and familiar with it, because you almost certainly will have to do some one-on-one training and hand holding! Rotary International has some excellent printable handouts that you might want to duplicate and include in the binder you will give each PE prior to (or at) PETS. You can also direct them to the Learning Center within Rotary Club Central for a self-paced course on this valuable resource. You will need to coach each PE on the non-negotiable requirement for them to enter into Club Central their goals with regard to membership and Rotary Foundation giving for their year. The benefit should be obvious: you as District Governor will only be able to set your membership/The Rotary Foundation goals when you know what the clubs have set as *their* goals. And once goals have been set, the presidents and you can keep track of your progress towards meeting them.

District Conference:

Not only should you and your spouse/partner attend the current DG's District Conference, but your own conference leadership team should attend also. They need to observe how things run, what to do, where and when to deploy volunteers, and watch for best practices. But towards the end of this year's conference, the DG will invite you and your team to make a presentation for your own conference next year. It has been said that this single event, the kickoff presentation at this year's conference, is the single most important promotion your District Conference will have. So be sure to create a dynamic presentation and have registration forms available to all attendees, perhaps even with an early registration bonus for those who sign up right then.

District Training Seminar:

Formerly known as the District Assembly, this is also primarily the responsibility of the DGE. Again, remember that you are not the Governor yet, so be sure to consult the incumbent DG to reach agreement on the date, location, budget, etc. Again, any contracts for venue or expenses must be approved by the DG.

That said, you and your District Trainer should put together an agenda that offers training to benefit everybody who attends. Your goal is to attract the leadership team of every club in the district, along with any Rotarian who just wants to learn more about Rotary. So you could conceivably have opening remarks by the DG, breakout sessions for club secretaries, treasurers, youth committees, fund raising committees, membership, etc. You could then bring everybody back for an inspiring keynote address by a speaker from outside the District and closing remarks by you to send everybody home pumped up for the year about to begin. The District Training Seminar is typically held on a Saturday morning in May.

Rotary International Convention

One of the greatest experiences any Rotarian can have is to attend a Rotary International Convention, and District 7500 provides a line item in its budget for the DGE and your spouse/partner to do so. You should not miss this opportunity! You will find dazzling entertainment, inspiring world-class speakers (previous speakers have included Bill Gates, Dolly Parton, and the UN Secretary General), and great workshops on numerous Rotary projects and programs. You will mingle with more than 20,000 other Rotarians from around the world, some wearing their colorful national dress, and will come away inspired and enthused about your impending year of service. You can find the dates and locations of Conventions for the next 4 or 5 years on Rotary.org.

Your District Budget:

Our Bylaws state that you should prepare a budget for the District for your year as governor by March 1st of your DGE year. You must then submit your proposed budget to the District Finance Committee. The Finance Committee must then meet with you during the month of March to give you their thoughts on your proposed budget. The Finance Committee shall then “certify” your budget—which means they have agreed with it—no later than April 1st.

The obvious source for a starting point is the current and maybe immediate-Past District Governors. Ask them to go over their budgets with you. A budget only has two components: income and expenses, and you know that your sole source of income is from District dues, which is tied directly to membership. So look at what you conservatively believe membership will be and multiply that by the *per capita* District dues figure. Now go over what the last couple of Governors have experienced as expenses. How realistic are these for your year? Bring the District Treasurer into the conversation as he/she will be an invaluable source of advice.

Once you have prepared your budget and had it certified by the Finance Committee, you must distribute it to every club president-elect and it must be approved at either the District Conference (preferred) or District Training Assembly. If you decide to wait until the District Training Assembly, you must give at least 14 days’ notice to the presidents-elect of your intention to present the budget for approval.

At least 75% of club presidents-elect present must vote in the affirmative to adopt your budget. Only presidents-elect or their proxies, may vote to adopt or amend the budget.

Your District Directory

By springtime of your DGE year, you should have assembled your entire District Leadership team. Now it is time to put together your District Directory. Consult with one or more current or past governors to see how they designed their directories. Do you want it to fit in a pocket or purse, or do you prefer a larger

page size which then reduces the cost? Talk to a printer (Len Adams from Toms River Rotary has printed many previous directories and is a great source of professional advice) to discuss your options and costs. Find out how they want you to submit the data. Then leave plenty of time—at least two weeks—after the printer gives you "proofs" (exactly how the finished page will look) for you to fact check. One suggestion: it is often said that the writer never sees his own mistakes, so pass on the job of fact checking to a person or small team. Ask them to contact each person listed in the page proof and email or physically show them what has been printed. Has their email or phone number changed, have two digits been transposed? Is that person not even in that position now? Would they prefer you use another phone number for them? Make all changes in clear print on the page proofs and then physically go over these with your printer, keeping a copy of the corrected proofs yourself. A few days later, you should get a revised set of page proofs. Again, ask you directory committee to compare this version with the corrected page proofs you gave the printer. When everyone agrees the changes were made correctly, you can give the printer the green light.

Most DGEs have as their goal the desire to hand out the new District directory at the changeover dinner. So start with that date, then ask the printer how much time he needs. Then add another two weeks, and you have your start date!

District Changeover:

You should consult with the incumbent Governor to decide on a date for the changeover. No matter what date you are "installed," you become DG at midnight on July 1st, but many DGEs prefer to have the event on a Friday or Saturday evening, and since the closest weekend day *after* July 1 may conflict with the July 4th holiday, the changeover is often done in late June. If that is the case, be sensitive to the fact that the incumbent governor is still in his/her year, so you need to get it on the current year's calendar. The changeover is not a district expense, so you should be careful to make the charge for attendees cover all your costs of the meal, printing, speakers, gifts, etc., unless you or your club plan to underwrite some of those costs privately.

A new tradition began in District 7500 in 2015 where the current DG will pass on her/his "District Governor" pin to the DGE at the changeover, and the DGE will provide a shiny new "Past District Governor" pin to the outgoing DG. It is also appropriate that the DGE arrange a nice gift, typically something with a personalized plaque, such as a clock, to be presented to the outgoing DG at the District Changeover. This is a token of the District's appreciation for the Governor's year of service to District 7500 and is paid for from District funds.

Club installations of Officers

By now, you should have established a good rapport with your incoming club presidents. They should already be feeling that you are "their" Governor, so as they plan their own club changeover of officers, many of them will ask if you can attend the event and be the Installing Officer. This is an honor, and a most pleasant way of getting to know the club.

You should invest some time in enquiring the format the President-elect would like, the names of outgoing and incoming officers, and the dress code. It is normal for the Installing Officer to say a few words about how appreciative everybody is of those who have served the club in the past year, and how you are looking forward to working with the new President and the club in the year ahead.

Things you should plan on attending:

- District Changeover
- District staff meetings
- Planning meetings for NJ State Vocational Assembly.
- NJ State Vocational Assembly.
- Zone Institute.
- Planning meetings for PETS
- Thanks for Giving Dinner
- International Assembly
- Mid-Year Assembly
- Pre-PETS
- PETS
- District Conference
- Rotary International Convention.

Finances during your term as District Governor-Elect:

You have no budget from Rotary International or the District. As with your DGN year, our District MAY have a small budget during your DGE year to reimburse expenses incurred on Rotary duties. District 7500's Bylaws provide for the DGE and their spouse/partner to attend the District Conference and the Zone Institute (including the Pre-Institute), and also the Rotary International Convention, and be reimbursed from the District budget.

Cleared for Take-off! You are our District Governor!

Official Visits:

Rotary International requires every DG to make an official visit to each Rotary club in their District in the first 180 days after becoming Governor. In practice, most DGs try to accomplish their official visits by early September. You can plan these well in advance, because you already know where and when the clubs meet. So take a sheet of paper, make five columns with Monday through Friday on each column. Then divide the days with horizontal rows representing Morning, midday, and evening. Now simply go through the directory and write each club's name in the appropriate box. Thus "Medford Sunrise" would be in the Wednesday morning box and "Marlton" would be in the Tuesday evening box. Depending on your work situation, you may want to do three clubs in a day, so from where you live, what makes sense to do on the first Monday of July, the first Tuesday, and so on?

Remember that you gave Rotary International a budget estimate last year to cover your official visits. So if it makes sense after visiting an evening club at the far corner of the District one evening, to then visit an early morning club the next day, you have the budget for a hotel stay.

There is no reason you cannot plan your official visits many weeks in advance—maybe even before PETS. This would allow you to provide each President-Elect with the dates far in advance of his/her taking office to be sure they do not schedule another speaker to conflict with your visit. Send each President-elect a letter/email four weeks in advance of your visit, reminding them of the need to be the only speaker that day, and then another reminder the week prior. You should remind the President that you would like to meet their Board of Directors, either prior to, or immediately following, your speech to the club. Your AGs should also be copied and instructed to remind their presidents of your visit. It is customary for the AG to accompany the DG on official visits, and for the club not to charge either the DG or AG for their meal.

You will receive much valuable advice on the content and delivery of your official visits talk at GETS and the International Assembly.

Finances during your term as District Governor:

You are now responsible for *two* budgets! The District budget is the one approved by the clubs at the District Conference. Generally speaking, the DG is permitted some latitude to move spending between line items so long as the bottom-line expense is not exceeded. Again, rely on your District Treasurer, Finance Committee, or Council of Governors for advice here.

But Rotary International will also send you a check soon after July 1st for 70% of the expense budget they approved for your official duties. It is recommended that you open a separate bank account just for this money. Pay *very* careful attention to what R.I. tells you what you can and cannot use their money for. Every expense item will be examined. Any expense item of \$75 or more must be accompanied by a paid receipt. Now you can pull out the file folder in which you have been keep track of mileage to visit District Conference sites, or business cards when you were DGE, or a training expense for your AGs—

and you can submit those items to Rotary International and use the money from the account where their 70% sits for reimbursement. The final 30% will be released from Rotary International upon satisfactory completion of your DG year and submission of properly verified accounting for your total annual budget expenses.

District Newsletter

It is extremely important that you communicate well—and regularly—with the Rotarians in our District, and few things can better accomplish this than the Governor's Newsletter. If writing is not your strong suit, recruit somebody who can write it for you. Your newsletter should be informative of things going on in the District and RI, and illustrative of what is going on in the clubs. You should encourage the clubs to send their upcoming event details so you can spread the word for them, and you should also invite them to submit photos and brief descriptions of special events (such as a service project or induction of a new member) for publication in the newsletter.

The buck stops HERE!

You could be confronted with difficult decisions. Should I pull a club's charter? Should I tell a club they cannot do a certain thing? Should I refuse to agree to a budget item that uses District funds? You are now the one and only recognized representative of Rotary International in this District. You are responsible for such things as the RYLA budget—even if you were not consulted on how the RYLA team plans to spend their money. Every check using District funds must be approved by you, so you have a fiduciary duty to make sure that what you approve will bring honor to Rotary and is within your approved budget.

If a club objects to a new club being chartered in their town, that's *your* call to make. You should read very carefully the Manual of Procedure and Standard Rotary Club Constitution, and keep copies at work and at home for quick reference to guide your decisions.

Help! I feel so alone!

Being District Governor has been described a 95% great fun and 5% frustration. Another PDG said, "Sometimes, I slept like a baby when I was Governor. Every two hours I woke up crying!" You are trying to manage volunteers, not employees—and that's a challenge. Rotarians tend to be business owners or professionals, and they tend to be the ones *giving* directions, not following them; challenge number two! And you are trying to balance the need to be nice . . . and flexible . . . while meeting the deadlines and standards that come with Rotary International bylaws, program rules, and advance registration requirements for venues.

But you are not alone! You have spent time to develop a team that cares about you and your mission. First, you have your experience and training to fall back on. For sticky situations, you have the Four-Way Test. The Manual of Procedure is an invaluable source of proper procedures and protocol for how Rotarians, clubs, and Districts should conduct themselves. You have the Council of Governors, all of whom have walked the proverbial mile in your shoes, to go to for advice. And you have a wonderful

group of people in Club & District Support at Rotary International headquarters who will walk you through just about any issue concerning Rotary policies and procedures.

Staff Meetings:

In recent years our District has convened about 8 staff meetings annually. The frequency of where you hold your District staff meetings, whom you invite, and what you serve is yours alone. Providing dinner for 25-30 people at a fine restaurant every month can be an enormous expense. Does it have to be done the way it was done before? Could fewer people be invited? Could a less expensive venue be used? Could attendees be asked to contribute towards to cost of the meal? Would that cause a revolt because some consider this to be a perk? On the other hand, is it not a reasonable thing to buy dinner roughly once a month for those volunteers whose tireless contributions have helped make your year as Governor run smoothly and meet your goals? All of these are good questions. As a leader employing a "Zero-Based Budgeting" model to your gubernatorial year, you should think creatively (and perhaps seek feedback from PDGs or those attending the staff meetings) for a way to be better stewards of our district funds. We will experiment in 2015-16 with holding Webinar staff meetings for the months when we do not convene for in-person gatherings.

Things you should plan on attending:

- District Changeover (don't think you'd want to miss this!)
- District staff meetings
- Planning meetings for NJ State Vocational Assembly.
- NJ State Vocational Assembly.
- Zone Institute.
- Planning meetings for PETS
- Thanks for Giving Dinner
- Gift of Life holiday event
- Mid-Year Assembly
- PETS
- Gift of Life annual banquet (usually in March)
- District Conference
- District Training Seminar
- Rotary International Convention.

Appendix

The following active Past District Governors are rooting for you to succeed! Contact any of them for advice.

Name	DG Year	Email	Phone
David C. Forward	2015-15	Rotary@DaveForward.com	609.354.8104
Harriet Primack	2014-15	hmaip@msn.com	908.415.8652
Shelia Vinton	2013-14	sevspecial@aol.com	908.600.0996
Joan Vas	2012-13	joanvas@optonline.net	732.241.3947
Gary Siciliano	2011-12	garysiciliano@aol.com	732.272.8443
Horton Hickerson	2010-11	Horton@hickersoncpa.com	732.687.1350
Kathy Hiltner	2009-10	kathyhiltner@aol.com	609.502.3314
Dan Cortese	2008-09	dan@dcortese.com	609.290.5770
Kathleen "Boots" White	2007-08	kwboots@aol.com	609.410.1034
John Hammer	2006-07	johnhammer@juno.com	609.871.1721
Bud Umbaugh	2004-05	RotaryBud@comcast.net	609.296.2885
Pam Maguire	2003-04	pammaguire@msn.com	732.666.1082
Larry Ninerell	2002-03	LR9rell@aol.com	609.315.3849
Jeff Donahue	2001-02	jeffdonoghue@msn.com	561.389.0770
Karl Drzymala	2000-01	Drzy7500@hotmail.com	239.283.6262
Mike Colasurdo, Sr.	1997-98	aandmmeats@aol.com	732.232.5095
Dick Isackson	1996-97	risackson@comcast.net	609.877.4728
Dick Ritchie	1995-96	dickritchie@verizon.net	609.693.9189
Peter Roukis	1989-90	petesden@aol.com	609.488.5096
Art Gilbert	1988-89	ArtGilbert@live.com	609.859.8764

Our Council of Governors were asked two questions for this pamphlet:

- What single piece of advice do you have for the person starting out on the DG journey?
- What one thing do you know now that you wish you had known prior to becoming District Governor?

Here are their responses:

What single piece of advice do you have for the person starting out on the DG journey?

" As Governor Elect, and even when you're the District Governor Nominee, you should start visiting the clubs so they can get to know you before you become Governor. Maybe one visit as DGN and one as DGE." — Bud Umbaugh, District Governor 2004-2005

"I would advise you get someone that you trust to work with you right from the start of your process. If I had it to do over again, one of the things I would do differently is to start my planning process earlier than I did. Get your AGs and important staff people picked early and start to plan with them your year. The DG candidate might want to consider the personal financial cost of going through this tract. I realize that it is the DG's feeling that determines how much of the cost he or she will pay for themselves. For example, while I never paid for any meals for my official visits, I did pay when it was not an official visit and I paid for any fundraiser that I attended, even if it was at the invitation of the club. If I go back in my records, it must have cost me at least \$5,000 during my year over and above what the district and RI paid for. You might want to ask the other PDGs about this and their feeling as to what it cost them. I never even kept track of postage and tolls and mileage other than for my visits." — Horton Hickerson, District Governor 2010-2011

"Plan early – Defining goals and objectives and building your Team – and it's never too early to start – This will allow for the fact that some Rotarians are procrastinators – and everything takes longer than you anticipate it will." — Harriet Primack, District Governor 2014-15

"Remember to have fun and embrace the experience. Rotarians are wonderful dedicated individuals with much diversity. It will be an experience that you will never forget." — Kathy Hiltner, District Governor 2009-10

**What one thing do you know now that you wish you had known prior to becoming
District Governor?**

"If I had to do it over, I would not try to make all my official visits within one or two months after becoming Governor. It really wasn't that important to the clubs. I would spread my official visits throughout the year and maybe even try to visit each club at least once before my officially scheduled visit. Kind of like, 'Just to say Hi, I'm your Governor and I just wanted to stop by and say Hi. And by-the-way I'll be back on (THIS DATE) and I hope to see everyone and your partners/spouses etc. because I'll have some important information about big things happening in our district and the world of Rotary.' Just as point of information, five of the clubs had scheduled a speaker even when I had published an official visit calendar, so be sure to tell the club Presidents to reserve the meeting for you! I had one President who got up and announced to the membership that 'We'll have to have the Governor come back at another time because we have an important speaker scheduled tonight.' He never even called me to the microphone. Guess who skipped that second invite." — Bud Umbaugh, District Governor 2004-2005

"I now know that your DGE year and your DG year are going to take far more time than you expect and one needs to assess his/her availability to take on the role of District Governor. In the immortal words of Rotary International President Glenn Estess, 'Being a District governor is a million dollar experience, and I don't know a Past District Governor that would give you a nickel to do it again.'" — Horton Hickerson, District Governor 2010-2011

"Although jobs and tasks have been on-going, there needs to be definitive expectations as to what you expect of each position or person who is given a task, regardless of what has been done in the past." — Harriet Primack, District Governor 2014-15

"Be prepared to work very hard 6 months before taking office. I think that those 6 months were more intense than the entire year as DG. I was totally unprepared for it!" — Kathy Hiltner, District Governor 2009-10