

(as amended 28 Feb 2014)

## District 5300 Handbook of Protocol (HOP)

### Section 1—Rotary's Philosophical Underpinnings

#### *What is Rotary?*

“Rotary is an organization of business and professional persons united worldwide who provide humanitarian service, encourage high ethical standards in all vocations, and help build goodwill and peace in the world.”

The Object of Rotary is “to encourage and foster the ideal of service as a basis of worthy enterprise.<sup>1</sup> Soon after its founding in 1905, Rotary set its course toward service to community, customers, employees and children, thus becoming the first “service club” in the United States.<sup>2</sup>

#### *What Rotary is Not*

Rotary is not a fraternity; a sorority; a religious organization; a political party; a ‘self-help’ organization; or a formal ‘networking structure.’ Rotary espouses no creed or dogma, supports no particular political philosophy, and does not engage in overt political campaigning.

#### *What does Rotary Believe?*

Rotary believes in “service above self.” It supports “...the development of acquaintance as the opportunity for service; the promotion of high ethical standards in business and professions through service in one’s personal, business and community life; and the advancement of international understanding, goodwill, and peace.”<sup>3</sup>

Rotary espouses a high moral code called the “Four Way Test” of “the things we think, say or do: 1. Is it the TRUTH? 2. Is it FAIR to all concerned? 3. Will it build GOODWILL and BETTER FRIENDSHIPS? 4. Will it be BENEFICIAL to all

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<sup>1</sup> Clifford L. Dochterman, *The ABC's of Rotary* (Chicago: Rotary International, 2003), pp. 1 and 3. Hereafter “ABC’s.”

<sup>2</sup> David C. Forward, *A Century of Service: The Story of Rotary International* (Chicago: Rotary International, 2003), p.4. Hereafter “*Century*.”

<sup>3</sup> ABC’s, p.3.

concerned? <sup>4</sup>This ethical conceptualization offers each Rotarian proper guidance for the conduct of a worthy and useful life.

### ***How does the foregoing information relate to the issue of protocol in Rotary?***

While Rotary is a friendly and comradely organization, one that offers many opportunities for good fellowship and pleasant interchange with others, the organization has a very serious purpose for existing. It is not to be considered frivolous or “lightweight” in importance. This suggests that the interactions between and among Rotarians and, equally importantly, interactions with non-Rotarians should always be conducted with dignity and concern for proper decorum. No actions taken by Rotarians, either **publicly or privately**, should give the appearance of demeaning the local, district or national organization **or the club, district, or national officers thereof**. Common sense, good taste, and the "Golden Rule" should guide the behavior of Rotarians in their interactions with one another and with non-Rotarians.

## **Section 2—District Level Protocol**

### **Introductions During Rotary Functions**

Proper recognition of the dedicated volunteers who serve Rotary at various levels is an important part of the "culture and tradition" of the organization. This recognition is part of the "compensation" of those who dedicate a significant portion of their lives to the important work of Rotary.

### **RI Introductions Protocol**

The following order of protocol shall be used to introduce, present and seat all current, past, and future officers of RI and its Foundation, committee members, and their spouses at all RI meetings, functions, and receiving lines:

International President (or President’s representative)  
 President-elect  
 Vice-President

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<sup>4</sup> ABC’s, p. 4.

Treasurer  
 Other Directors  
 Past Presidents (in order of seniority)  
 Trustee Chairman  
 Trustee Chairman-elect  
 Trustee Vice-Chairman  
 Other Trustees  
 President, Immediate Past President, Vice-President, Honorary Treasurer of RIBI  
 General Secretary  
 President-nominee  
 Past RI Vice Presidents or Past Directors (in order of seniority)  
 Past Trustees (in order of seniority)  
 Past General Secretaries (in order of seniority)  
 Directors-elect  
 District Governors  
 RI and TRF Committees, Advisors, Representatives, Training Leaders and  
 Resource Groups  
 Directors-nominee  
 Past Governors (in order of seniority)  
 Incoming Trustees  
 Governors-elect

At Rotary functions, officers should be addressed according to protocol only once. The current order of protocol places current officers and committee members above past and incoming positions. The Rotarians' current position shall take precedence over past positions; past positions shall take precedence over future positions; individuals holding more than one position shall be ranked by the highest office; accompanying spouses have the same rank.

***Rotary Code of Policies 135 January 2008***

The governor shall plan, promote, and preside at all official district meetings except as otherwise expressly provided.

After the required order of protocol above, the following order of protocol is recommended and should be modified to fit local customs and practice:

Regional and zone-level committees members  
 Assistant governors  
 District secretary/treasurer  
 District committee members  
 Club presidents

Club presidents-elect  
 Club vice-president  
 Club secretary  
 Club treasurer  
 Club sergeants-at-arms  
 Other club board members  
 Club committee chairs  
 Past assistant governors  
 Rotarians  
 TRF alumni  
 Rotarian's families

At district meetings, Rotarians visiting from a foreign country may be placed before local Rotarians of the same rank, as a courtesy toward guests.

High-ranking non-Rotarians may be given precedence in ranking according to local custom. Clubs and districts are encouraged to advise guests if protocol places Rotarians before non-Rotarians.

*Source: July 1995 Mtg., Bd. Dec. 23; Amended by May 2000 Mtg., Bd. Dec. 412; November 2005 Mtg., Bd. Dec. 103; February 2006 Mtg., Bd., Dec. 133; November 2007 Mtg., Bd. Dec. 32; November 2007 Mtg., Bd. Dec. 48; November 2007 Mtg., Bd. Dec. 87*

## **Guidelines for the Selection of Aides to RI Officers**

Selection of the Aide and his/her partner is very important. They will exemplify the character of District 5300—the attitude of local Rotarians and the graciousness of the District. Clearly, their behavior will influence perceptions of the visiting official about the overall quality of the district.

The RI Board has adopted “Guidelines for the Selection of Aides to RI Officers.” The role of the aide to the RI president or other RI officer is to provide assistance and information to the officer before, during and after the visit of the officer. The selection of the aide should be based on the ability of the individual(s) to fulfill the responsibilities of the assignment. The aide:

1. should be a knowledgeable and experienced Rotarian, preferably a past district governor; past director; DGE or DGN. The Aide should have an understanding of Rotary protocol, understand the details of hospitality and courtesy; be well-versed in host club/district activities and information; and should *want* to undertake the

assignment. (If the Rotarian considers the task merely another chore, it may be wise to "look further" for an appointee.)

2. be available to the officer throughout the visit/event; should have no conflicting Rotary duties during the period of the visit; be willing to place the needs of the VIP first throughout the event.

3. have the physical stamina to maintain the demanding schedule of the event.

4. be well organized, punctual and patient.

5. be fluent in the language of the officer and able to provide interpretation if the officer is not conversant in the language used in the host area.

6. be fully informed on the VIP's schedule and needs; be knowledgeable about the program and schedule for the conference in order to keep the VIP "on track."

7. and be able to carry out all duties outlined in the "Guidelines for Aides to Rotary International Officer."

8. If the officer is bringing a spouse/partner, the spouse/partner of the aide should also be available for the entire event and willing to serve as aide to the officer's spouse/partner. Give full attention to the suitability of the prospective aide's partner, insuring that s/he will enjoy the assignment and be willing to devote the necessary time to insure a successful visit. Look for couples who enjoy being with other people and who can make them feel at ease.

*Adapted from: (February 2004 Mtg., Bd. Dec. 159)Source: October 2003 Mtg., Bd. Dec. 60*



## **Guidelines for Aides to the RI President, President's Representative and other Very Important People**

The RI Board has adopted "Guidelines for Aides to RI Officers." RI presidents, Directors, or Foundation Trustees may develop guidelines that are specific to their special travel needs and that vary from these guidelines. The overall responsibility is to be sure that the officer is comfortable, arrives on time for all events, and enjoys the visit.

The following guidelines are to be followed by the aide(s) in supporting Very important Persons (VIP's):

**1. Before arrival, the aide's responsibilities are to:**

- a. Send information to the officer giving details about himself/herself, such as your address, landline and cell phone numbers, fax number and emails, and name of spouse and photos, if possible; Secure a biography and exchange pictures or Rotary business cards by fax, letter or email. This will help when identifying them and will also provide an idea of their age, interest and any special needs.
- b. Inform officer of any special dress obligations (formal wear, etc.) during the time of the visit; ask for any specific requests from officer; identification of special events such as golf and tennis tournaments, walk-runs, etc that might require special equipment and/or attire.
- c. Send the officer, or confirm that event organizers have sent, a complete program for the entire time of the visit, including information on all presentations or speeches the officer will be expected to make and any other commitments, visits or activities in which he/she will be expected to participate, as well as general background on the host club(s) and/or district(s);
- d. Have information on hand as to medical help (hospital, doctor, dentist) for emergencies; information on climate and projected weather conditions.
- e. Inquire about any special accommodation needs or preferences the VIP may have (type of beds, smoking/non-smoking, etc.) and any dietary restrictions or allergies;
- f. Check hotel arrangements
  - 1) Pre-register VIP (and spouse, if appropriate);
  - 2) Have key to deliver to the officer personally;
  - 3) Check room to make sure that it is ready for occupancy; it should be in a desirable part of the hotel and large enough for work and to entertain small groups, if desired. Check the closet for adequate supplies of hangers; insure that the light fixtures and phone/internet connections are functional, and that appropriate items have been ordered (ie. Fruit basket, flowers etc.) Such welcome items should be delivered to the

room prior to the VIP's arrival prior to that person's arrival, along with a note from the event chair/coordinator extending welcome.

- 4) Check billing instructions, so there are no problems with checkout. Be sure that arrangements for payment are clear. If the officer is expected to pay directly, be sure the officer is aware of this prior to check-in. Review the hotel bill on behalf of the VIP;
- g. If there are registration materials and/or badges for the event, secure that material in advance and check to be sure names are spelled correctly and that all necessary material and final schedule information is included in the materials.

## **2. During the officer's stay, the aide's responsibilities are to:**

- a. Meet the officer at the airport (or other point of arrival), assist with baggage as needed and provide transportation, as needed, throughout the visit; If the VIP is using personal auto, determine time of arrival and stand by in the hotel lobby area to provide welcome to the guest and spouse, if present.
- b. Be sure the officer knows how to contact you at all times during his/her stay; (hotel room, cell and home phones; email address.)
- c. Be sure the officer knows the exact time he/she is to be picked up for any activity;
- d. Escort the officer and his/her spouse to each activity and stay with them at throughout. If possible, know the seating arrangements in advance and have your seats as close to them as possible; you will need to be immediately available during the meal or other activity.
- e. Introduce the officer to other participants and provide as many opportunities as possible for the officer to interact with other Rotarians and guests. However, it may also be necessary to be available to help move the officer through a crowd or prevent one person from monopolizing the officer. Be familiar with the VIP's bio as a way of easing conversation with and introductions to others visiting with him/her. Offer to carry briefcases, cameras, etc. to keep the VIP's hands free; stand ready to take pictures on behalf of the VIP as appropriate.
- f. Be attentive to any need of officer and spouse during the activity; be protective and helpful, but not overbearing or intrusive; know the dress code,

seating arrangements and schedules of each activity and provide this information to the VIP upon request. Provide a seating chart for all meal functions. Provide a list of room assignments of other VIP's and key persons that they may need to contact.

- g. Handle any gifts or literature the officer may receive. If possible, make sure a business card is attached to these items. If necessary, send gifts to the officer's home or office following the event. Please also send a list of the gifts received with the complete name and address of the giver;
- h. Keep the event organizer(s) informed about any needs or desires of the VIP; do your best to identify these requirements well in advance of the event. "No surprises on game day" is a good rule to follow. However, it is necessary to be ready for the unexpected; to the extent possible, anticipate situations that might arise; do not be afraid to ask officer what her/his wishes are;
- i. Do not attempt to schedule any activities other than those already planned by the coordinator of the event, unless specifically asked to do so by the officer. If there is free time space in the schedule, you should inquire about how the VIP wishes to spend the available time. It might be that s/he would enjoy a special tour of the area, to see a Rotary project, to rest, etc.
- j. Aides should consider having a small gift to give to the VIP—a book about the local area or a local artist or writer's work would be appropriate in this regard.
- k. Be prepared to carry out various "ad hoc" responsibilities. For example, you may be called upon to serve as "photographer" for those wishing to have photos taken with the VIP.

### **3. Following the event, the aide's responsibilities are to:**

- a. Provide (or arrange) transportation back to the airport (or other point of departure) for the officer and spouse, including assistance with baggage; see to it that the VIP "makes his/her confirmation and connections for the trip home.
- b. If needed, ship large gifts or mementos to the VIP. Confirm their safe arrival. Send a note expressing thanks for his/her participation in the event, along with available pictures. (The Chair/Convenor of the event will also be expected to send a note of thanks. )



*(Adapted from February 2004 Mtg., Bd. Dec. 159) Source: October 2003 Mtg., Bd. Dec. 60*

## **Guidelines for Attire at Rotary Functions**

Fashion, preference and tradition all affect the "dress code" appropriate during Rotary functions. District 5300 has long adopted a more relaxed code of dress than is customary in other parts of the Rotary World. That being the case, the following dress suggestions are to serve as guidelines, rather than hard and fast rules of behavior.

	<b>Ladies</b>	<b>Gentlemen</b>
<b>Formal Occasion:</b>	Long or short Cocktail dress	Black or white dinner jacket
<b>Informal Occasion:</b>	Dress, suit or Separates suitable For church, theater, Nice restaurant	Business Suit
<b>Casual Occasion:</b>	Slacks, skirt or dress Suitable for shopping Shorts not usually worn	Slacks, sport shirt; sweater sport coat; no ties

## **Head Table Seating Arrangements at Formal Meal Functions**

While informality is a common practice in District 5300, certain occasions call for more procedural formality. This is particularly the case when the RI President, the President's Representative, Zone Director, or the District Governor is participating in the event. In such situations, district standard operating procedures specify seating arrangements and the display of national, state and Rotary International flags. Two illustrations are included as guidance for those handling the meal function logistics.

In those instances in which alternate seating arrangements, such as the use of round, as opposed to rectangular, tables are employed, a specific "head table" should be designated. National and District level officers and honorees should all be seated at that table during the meal function. Prior arrangements shall be made

by those in charge of the function for the appointment of an escort officer to see to the needs of each visiting dignitary. That officer shall be responsible to insure that the visitor is **greeted, hosted, and properly introduced to the group assembled.** There can be no excuse for failure to offer these normal and expected Rotary courtesies.

**Seating Chart for a Rotary Meal – District Governor Is Senior Officer Present**

US Flag      California Flag      Nevada Flag      Rotary International Flag														
Male *	Speaker Aide Partner	Speaker Aide	Speaker Partner	Speaker	M/C PDG of previous year		DG	DG Partner	DGE	DGE Partner	DGN	DGN Partner	Male *	
							Lectern							
Audience														

Place two flags on either side of lectern, in the specified order

\* Alternate genders BUT, as a courtesy, place males at each end

**Seating Chart for a Rotary Meal – RI President Is Senior Officer Present**

US Flag      President’s Country Flag-      California State Flag-      Nevada State Flag      Rotary International Flag														
Male *	President Aide Partner	President Aide	RI President Partner	RI President	M/C PDG of previous year		DG	DG Partner	DGE	DGE Partner	DGN	DGN Partner	Male *	
							Lectern							
Audience														

Distribute flags evenly on both sides of Lectern

Rotary International Flag Displayed in last position on the left, as one faces audience.

\* Alternate genders BUT, as a courtesy, place males at each end

## **Introduction of the Head Table**

Introduction of the head table should begin with the meeting chairperson or presiding officer, and then proceed from the lowest ranking person in order of precedence to the person of highest rank. When spouses are present they are to be introduced along with the Rotarian. (ex. "Past International Director Casey Smith and his Rotary partner, Janet; or "Past District Governor Linda Albright and her Rotary partner, Robert.)

## **National Anthems**

On occasion, official representatives from another country will be honored at a District 5300 event where national anthems are played. As a courtesy the anthem of such visiting representative should precede that of the United States. Those present are expected to stand and face the flag of the country whose anthem is being played, if displayed. In the absence of a flag members of the audience should face the direction of the music and stand at respectful attention. When the U.S. National Anthem is played, those present are expected to place their right hands over their hearts in a gesture of salute.

Source: .National Anthem Committee [National Anthem Code of the United States](#), adopted [April 2, 1942](#), [National Association for Music Education National Anthem Project](#)

[United States Code](#), Title 36 (Patriotic Societies and Observances), Section 301, [Cornell University Law School](#), accessed [September 14, 2007](#)

## **The Pledge of Allegiance**

When announcing to the audience the conduct of the Pledge to the Flag of the United States of America, it is appropriate to utilize the following introductory instruction: "Let us now face the flag of the United States of America; place your hand over your heart and join me as we pledge ourselves anew." Keep in mind that there may be Rotarians and guests from another country present. These individuals should be asked to stand respectfully during the reciting of the pledge. The group assembled should understand that there are international guests present who will not be joining in the pledge.

## **Platform or Floor Display of Flags at District 5300 Functions**

When displayed on the floor or on a platform, the United States flag is always positioned to the speaker's right, (which appears to be the left from the audience

members' perspective as they face the lectern/speaker's platform.) This is considered to be the position of honor. When flown with the Rotary International flag and those of the state or states that comprise the Rotary District, State flags are displayed according to the date upon which admitted to the union, from earliest to most recent.

In District 5300, the Order of display, from the speaker's right to left (as s/he faces the audience,) is as follows:

United States Flag (1<sup>st</sup> position)

Flag of the State of California (2<sup>nd</sup> position)

Flag of the State of Nevada. (3<sup>rd</sup> position)

Rotary International Flag (4<sup>th</sup> position)

Displaying the national flag of the current R.I. President's country is optional in his absence. When displayed, it is placed in the second position, just to the left of the United States Flag. State flags then occupy positions 3 and 4, and the Rotary International flag occupies position 5.

All flags are to be mounted on adjacent, but separate flagpoles; must be of the same height; and must form a straight line. In the interest of balance, two flags should be placed to the right of the rostrum/lectern and two to the left, as viewed from the speaker's perspective; or three to the left if the R.I. President's national color is displayed.

Sources : (E-mail communication from Rotary International dated June 4, 2007); (*General Protocol*, Rotary District International 9790 dated May 15, 2007, p.1.); U.S.Code, Title 4, Chapter 1, section k., Jan 3, 2005; U.S. Army Regulation 840-10, November 1, 1998;

## **Introduction of Speakers at Rotary Functions**

Take the time to know the speaker's biography well. Chat with the speaker to gain additional information. Find something interesting about the speaker that is not contained in the printed material placed at the tables. The more information you can commit to memory the better your presentation will be. Be brief and to the point. Most introductions are done well in two minutes or less. Please do not exceed three minutes. Avoid referring the audience to the printed materials about the speaker, assuming incorrectly that most people will have read the biographical materials. Taking this approach falls short of making the speaker feel welcome and appreciated, a fatal flaw in protocol.

## **Official Club Visits**

### **Overview**

During the District Governor's (DG) term of office s/he is the Official Representative of Rotary International in Evanston, Illinois. As such the DG is "a person set apart and under authority." Thus the individual occupying the office is entitled to appropriate deference and accommodation that derives from the important office held, a part of the longstanding traditions of Rotary International.

Many responsibilities devolve upon the DG. There are perhaps none that are more important than the annual Official Club Visits. These events provide the DG with the opportunity to assess the current status or condition of the clubs in the District. Since the DG is assigned responsibility by Rotary International for the clubs and their actions, it is necessary for this individual to be conversant with the operational health of each local unit.

It is expected that the DG will visit each club within the District, preferably during the first several months of the Rotary year. Before the Rotary year begins, the District Governor-Elect (or his Aide) and the various club presidents are expected to confer about the date, time, and format of the Official Club Visit. In District 5300 the Official Club Visit Calendar is coordinated by the DG's Aide and is set by June 1<sup>st</sup>.

### **The Club Visit**

It is incumbent upon the Club President to make arrangements for a significant turnout by the club membership on the day of the Official Visit. The Club President should announce the DG's visit at least one month in advance and see that the visit is prominently listed in the club bulletin and on the website. Oral reminders should be made during club meetings as the date of the visit approaches. The Club President should remain aware that many local members are not able to attend the District Assembly or District Conference, so the Official Visit may well be the only time during the Rotary year that these members will have the opportunity to meet the DG and his/her Rotary partner.

It is considered both courteous and appropriate for the Club President, or a designated representative, to assist the visiting DG in making lodging arrangements and obtaining directions to the club's meeting location if either is needed. As an additional matter of "good form," any of the DG's special dietary requirements and health issues should be taken into consideration during the local club's planning. The DG may request assistance from the Executive Assistant Governor (XAG) or the Assistant Governor (AG) serving the area of the visit. In such instances the Club

President and AG should coordinate their activities to insure that none of the necessary local arrangements are missed. In all instances the DG will cover the costs of transportation and lodging during the Official Visit.

The Club President or designee is expected to greet the DG upon arrival at the place of the club meeting and to act as the DG's escort officer, seeing to it that s/he is introduced to all club officers and as many of the members as is feasible. The DG and his/her Rotary partner are not to be "left to fend for themselves." In those cases in which the XAG or an AG is attending with the DG, the escort duties may be delegated to that individual. The Club President, however, remains responsible for all that occurs in the extension of proper hospitality during the club visit.

Neither the DG nor Rotary partner, if present, should be charged for the club meal during the Official Visit, or for any subsequent club events to which they are invited. This courtesy should also be extended to the XAG, AG, or DG's Aide if in attendance. The President must ensure that the person handling registration is aware of this arrangement. It is also inappropriate to ask the DG to purchase a raffle ticket or to participate in other fund raising activities. The DG may, of course, choose to participate in any club activity he or she deems appropriate. Such participation, however, is not to be solicited. Such expenses are not within the annual budgetary allocation for either the District or the DG personally.

During the club meeting the XAG, AG, or the Club President may introduce the DG. The DG will have furnished a biographical summary in advance for the use of the person handling introductions. The DG will normally utilize 20-25 minutes to address the group assembled. No other program is to be scheduled during the DG's Official Visit, since **the District Governor is the program** of the day! It is considered to be in proper form for those present to rise both prior to and upon completion of the DG's talk as a gesture of respect for the office of District Governor. (A Rotarian seated near the front of the room may be designated to provide the "rising example.")

The introduction of the DG should be carried out in a dignified and tasteful manner. Ribald jokes or other remarks at the expense of the DG are never in good taste and should always be avoided. ("Locker room humor" is never in good form.) Following the introduction of the DG by title, Rotary protocol suggests the use of first names along with some indication of rank in additional formal speech ("DG Sam" or "Governor Sally," for example.) In private conversation good taste should be the guide.

If the DG is invited to participate in special presentations, such as Paul Harris Fellow Awards or the induction of new members, specific information must be provided in advance. There should be no "programmatic surprises." Special event

dress codes should also be furnished several weeks in advance. In those instances in which the DG's partner is present, an escort is to be assigned to insure the comfort of this important person throughout the visit. In the event that a club wishes to show the DG a particularly impressive community project in which it is presently engaged or recently completed, plans should be coordinated in advance as part of the Official Visit planning process. Otherwise, time constraints may render such activities difficult, if not impossible, to accomplish.

The question of the presentation of gifts/mementos to the DG during official visits falls under the category of "local option." Some clubs have adopted a tradition of "gifting" the visiting DG with some item of local significance. In such instances the amount expended on the gift should be modest, placing no excessive burden on the local club. In recent years, DG's in District 5300 have sometimes requested that any such recognition take the form of a gift to the Rotary International Foundation in his/her name or designating funds for a project of particular interest to the DG or the club. The sitting DG should make his/her wishes known in this regard early in the year so that the local clubs can make appropriate arrangements.

If a head table is used during the club meal, the Club President sits to the left of the speaker's stand (from the audience's viewpoint). The DG sits to the right of the speaker's stand, and the Rotary partner (when present) is seated on the DG's left. Introduction of the head table should begin with the presiding officer, (normally the Club President) then continue from the person with the lowest rank as shown in the "Rotary Code of Policies, 26.090, RI Protocol" to the person with the highest rank (in this case, the DG). District personnel (XAG, AG, and Aide) may be seated among the club members. Arrangements in this regard should be made purposefully by the Club President, rather than being left to chance.

It is expected that the club meeting will follow standard weekly meeting procedures and the agenda that is normally employed. In this way the DG can gather a "feel" for the club and its typical operational pattern.

### **The Business Meeting**

On the day of the Official Visit, the DG will wish to hold a scheduled meeting with the Club Board lasting for one and one-half hours. This meeting is intended to be separate and distinct from a regular club board of directors meeting and should not be scheduled simultaneously therewith. Often this session will occur just before a luncheon or dinner function or after a breakfast function. Arrangements should be made to allow for a reasonable separation of time between the business session and the formal meal function. This will allow the DG an opportunity for personal refreshment.



During the business meeting arrangements should be made to host the DG's Rotary partner, when present, since s/he may not wish to attend that meeting. An escort officer should be assigned to offer appropriate diversion during that period of time.

The business meeting should be held in a private area conducive to quiet interaction, and it should be attended by the Club Board including Officers, Directors, and Chairs of the standing club committees: Club Administration; Public Relations; Membership; Service Projects and the Rotary Foundation. The meeting will normally be chaired by the Club President. The Club President should insure that all club members wear their nametags during the business meeting as a way of facilitating comfortable dialogue between the DG and those present. During this session the XAG and/or AG in attendance should remain discreetly in the background, providing only that input requested by the DG. This instruction also applies to the DG's Aide if present.

During this meeting club representatives will report on membership status, Rotary Foundation activities and giving, club projects and goals for the year, and areas of challenge and opportunity. Presidents are expected to show how plans set forth in the annual *Club Planning Guide* are coming to fruition. They should also discuss the state of the club budget. While this session offers the opportunity for celebration of the club's successes and plans for the future, it is also a time during which the DG will emphasize his/her annual goals and the operational goals and expectations of Rotary International.

### **Multiple Club Meetings**

On occasion it may be necessary for the DG to conduct the Official Visit with two or more clubs simultaneously. Visits of this type should be held at a time and location which best suits the needs of most Rotarians from the clubs involved. Multiple club visits place an extra logistical burden upon the local clubs participating since, in addition to the physical arrangements involved, it will be necessary during the meal function to insure that several sets of local club officers are appropriately seated, recognized and "involved." Good taste and appropriate deference to local Presidents are an absolute necessity under these conditions. The Group AG or XAG should work with the Club Presidents involved in coordinating the details of the meeting and may serve as the Master of Ceremonies during such events.

The business meetings with the various club Boards of Directors (BOD) should be conducted individually and separately at a time other than during the meal function. These meetings may require an additional trip or trips to the locality by the DG. Such additional sessions should be scheduled within a week before or after the multiple Club

Visit. The times and locations of these additional business sessions should be carefully coordinated and clearly communicated by the responsible AG not only to the DG and XAG, but also to the club officers, board members, and key committee chairs. The DG may have the AG or XAG represent him/her at BOD meetings.

### **In Conclusion**

The DG's Official Visit is an important event in the life of the individual Rotary club and the administrative life of the Rotary District. It is incumbent upon each Club President to place him/herself, the club members, and the club's endeavors in a positive light during this activity. When in doubt about procedural or behavioral matters, one can hardly go astray by applying the Golden Rule to the situation. Consideration and gentle civility are never amiss.

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