

**All Ohio P.E.T.S.  
Governance  
Documents &  
Operations  
Manual**

**Rotary**  **All Ohio P.E.T.S.**  
Presidents-Elect Training Seminar

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**ARTICLES OF INCORPORATION  
OF  
ALL-OHIO P.E.T.S., INC.**

The undersigned, all of whom are citizens of the United States, desiring to form a corporation, not-for-profit, under Section 1702.01 et seq., of the Revised Code of Ohio, do hereby certify:

**FIRST: NAME:** The name of said corporation shall be All-Ohio P.E.T.S., Inc.

**SECOND: PRINCIPAL OFFICE:** The location of the principal office of the corporation within Ohio shall be Cuyahoga Falls, Summit County, Ohio.

**THIRD: PURPOSE:** The corporation is organized exclusively for pleasure, recreation and other non-profitable purposes to assist in leadership training for districts of Rotary International located in Ohio and substantially all of its activities are for such purpose and no part of its net earnings shall inure to the benefit of any private shareholder or person.

In furtherance of such purposes, the Corporation may make distributions to organizations that qualify as exempt organizations under Section 501(c)(7) of the Internal Revenue Code of 1986, as amended, or the corresponding provision of any future United States Internal Revenue Law. (All further references to any section shall mean the Internal Revenue Code of 1986 and also the corresponding provision of any future United States Internal Revenue Laws. In furtherance of said purpose, the corporation is further granted any and all powers accorded to corporations by Chapters 1701 and 1702 of the revised Code of Ohio, as amended, which are necessary to exercise the foregoing purposes.

**FOURTH: INITIAL TRUSTEES:** The names and addresses of the persons who are the initial trustees of the corporation are as follows:

James F. Hunt Elyria, OH

Daniel F. Sazima Chagrin Falls, OH

George H. Windate Stonecreek, OH

Thomas A. Powell Mason, OH

Richard Brixner New Concord, OH

Such trustees shall serve as trustees of the corporation until the first annual meeting of the Trustees of the corporation to be held in 2002. The number of trustees shall be an odd number, not fewer than three (3). The Code of Regulations may establish that the term of a trustee may be for a period of more than one (1) year, but not more than three (3) years and that terms of trustees may expire in different years.

**FIFTH: ACTIVITIES:** No part of the net earnings of the corporation shall enure to the benefit of, or be distributable to its trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article Third. No substantial part of the activities of the corporation shall be the carrying on of propaganda, legislation, participate publishing or otherwise attempting to influence and the corporation shall not in, or intervene in (including the or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision in these Articles, the corporation shall not carry on any other activities not permitted to be carried on by a corporation exempt from federal income tax under Section 501(c)(7).

**SIXTH: PROHIBITED TRANSACTIONS:** The corporation shall not:

- (A) Distribute its income for each tax year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942,
- (B) Engage in any act of self-dealing, as defined in Section 4941(b),
- (C) Retain any excess business holdings, as defined in Section 4943(c),

(D) Make any investments in such manner as to subject it to tax under Section 4944, and

(E) Make taxable expenditures, as defined in Section 4945(d).

**SEVENTH: NON-STOCK:** The corporation shall be organized on a non-stock basis and shall have no members. The authority for all affairs of the corporation shall be in a Board of Trustees who shall have and may exercise all of the powers of the corporation as are permitted by law, these Articles of Incorporation, and the Bylaws of the corporation as, from time to time, in effect.

#### **AMENDMENT TO ARTICLES OF INCORPORATION OF ALL-OHIO P.E.T.S., INC.**

The Articles of Incorporation of ALL-OHIO P.E.T.S., Inc. are hereby amended with regard to the EIGHTH article which will be replaced in its entirety as follows:

#### **EIGHTH DISTRIBUTION UPON DISSOLUTION**

Upon dissolution of the Corporation, the Board of Trustees shall, after paying or making provision for the payment of all liabilities, dispose of the assets of the Corporation to the existing members, and to the extent possible, to be used for charitable, education, or scientific purposes. Any of such assets not disposed of shall be disposed of by the Court of Common Pleas of the county in which the principal office of the Corporation is then located, exclusively for such purposes or to such organizations as the Court shall determine to be in compliance with United States Internal Revenue Code that shall be in force and effect at the time of dissolution.





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IN WITNESS WHEREOF, we have hereunto subscribed our names,  
this 1st day of December, 2001.

Incorporator

James F. Hunt  
James F. Hunt

Incorporator

Daniel F. Sazima  
Daniel F. Sazima

Incorporator

George H. Winkler  
George H. Winkler

Incorporator

Thomas A. Powell  
Thomas A. Powell

Incorporator

Richard M. Brixner  
Richard Brixner

**ORIGINAL APPOINTMENT OF AGENT**

**OF**

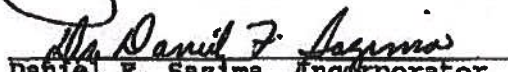
**ALL-OHIO P.E.T.S., INC.  
(NATURAL PERSON)**

The incorporators appoint the following natural person, a resident of this state, upon whom any process, notice or demand required or permitted by statute may be served:

James A. Smith  
700 Holiday Drive  
Willard, Ohio 44890

Dated: December 1, 2001

  
James F. Hunt, Incorporator

  
Daniel F. Sazima, Incorporator

  
George A. Windate, Incorporator

  
Thomas A. Powell, Incorporator

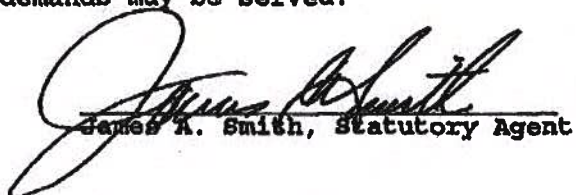
  
Richard Brixner, Incorporator

**ACCEPTANCE OF APPOINTMENT AS STATUTORY AGENT**

To the Incorporators of All-Ohio P.E.T.S., Inc.

I accept appointment as agent of your Corporation upon whom process, tax notices and demands may be served.

Dated: December 1, 2001

  
James A. Smith, Statutory Agent

**CODE OF REGULATIONS (BYLAWS)**

**OF**

**ALL-OHIO P.E.T.S., INC. (AOP)**

**ARTICLE 1: MEMBERS**

The Trustees shall constitute all of the members of the Corporation.

**ARTICLE 2: TRUSTEES**

(a) **Authority of Trustees.** The affairs, property and business of the Corporation shall be under the care of and managed by the Board of Trustees ("Board").

(b) **Number and Election.** The number of Trustees shall be eleven and shall be the District Governors Elect and the District Governors of Rotary International Districts 6600, 6630, 6650, 6670 and 6690 (the "Districts") as well as the General Chair of the AOP Steering Committee.

(c) **Term of Office.** Each Trustee shall hold office for a term starting on the July 1 immediately after his or her election and continuing through the later of the next June 30 or the date when his or her successor is elected and qualified unless he or she resigns earlier or is removed as Trustee.

(d) **Removal.** A Trustee shall be removed from office in the event he or she is no longer a member of a Rotary Club in one of the Districts or, in the case of a District Governor, he or she resigns or is removed as District Governor. A Trustee may also be removed from office by the affirmative vote of not less than seventy-five percent (75%) of the Trustees.

(e) **Location of Meetings.** Meetings of the Board may be held at any location in or outside the State of Ohio.





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**ARTICLE 3: MEETINGS OF TRUSTEES**

(a) **Annual Meeting.** The annual meeting of the Board shall be held each year at the site of and during the time of the All Ohio P.E.T.S. training session or at such other time and place during the first half of each calendar year as the Board may designate.

(b) **Special Meetings.** Special meetings of the Board may be called, either by the President (or, in case of his or her absence or inability to act or of a vacancy in the office of President, by the Vice President) or shall be called upon the written request to the President of not less than three (3) Trustees. At least five (5) days' prior notice must be given of any special meeting. Such notice must state the date, time, location and purpose of such meeting, and it may be given in writing by letter, postcard, e-mail, telephonic facsimile or, except as otherwise provided below in Article 9, orally by telephone. Such notice may be given by either the officer or the Trustees calling the meeting or the Secretary. Such notice may be waived in writing either before or after the meeting or by personal presence at the meeting without protest before the commencement of the meeting.

(c) **Meetings by Telephone or by Authorized Communication Equipment.** To the extent now or hereafter permitted by the statutes of the State of Ohio governing non-profit corporations, the Board and any committee appointed by the Board may conduct any of its meetings by conference telephone call or other means of authorized communications equipment if all persons participating in such meeting can hear each other at all times during the meeting. Any such meeting shall be preceded by a written notice to each Board or committee member, notifying him or her not less than five (5) days in advance of the meeting date and time when the meeting will be held. Said notice may be waived by any Board or committee member. No action shall be taken by such telephonic meeting unless at least a quorum of the Board or the committee has participated in such call and has voted in favor of such action.

(d) **Quorum.** A simple majority of the Trustees then in office shall constitute a quorum for all purposes provided that such quorum requirement must be met at the time of completion of the vote on any matter for such vote to be valid.

**ARTICLE 4: OFFICERS**

The officers of this Corporation shall be a President, a Vice President, a Secretary and a Treasurer. All officers, except the Treasurer, shall be members of the Board, shall be elected by the Board at the annual meeting, and shall hold office for the term described above in Article 2, Section (c). The Treasurer may but need not be a Board member. Further, the Treasurer shall serve one three-year term and may not serve again as Treasurer until at least one year has elapsed.

**ARTICLE 5: DUTIES OF OFFICERS**

(a) **President.** The President shall preside at all meetings of the Board and perform all duties usually required of and performed by presidents of not-for-profit corporations in Ohio, and such other further duties as may be required by the Board.

(b) **Vice President.** The Vice President shall perform all the duties of the President in case of the absence, death or disability of the President. In case both the President and the Vice President are absent or unable to perform their duties, the Board may appoint a president pro tempore.

(c) **Secretary.** The Secretary shall keep minutes of all meetings of the Board and committees of the Board and make a record of the same. The Secretary shall keep a book containing the names and addresses of all of the Trustees, the date of each Trustee's election and the date of removal of any Trustee. The Secretary shall also perform such other duties as may be required by the Board.

(d) **Treasurer.** It shall be the duty of the Treasurer to keep accurate financial records for the Corporation including all receipts and disbursements; to receive all monies paid to the Corporation and safely keep same; and to be responsible for the preparation of financial reports and statements to be presented to the Board of Trustees and to the Executive Committee from time to time.



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#### **ARTICLE 6: VOTING WITHOUT MEETING**

(a) **Voting by Mail.** Any Trustee may cast his or her written vote by mail on any proposal voted upon by the other members of the Board of Trustees by mail by sending such written vote to the Secretary of the Board of Trustees by the date required by the notice given concerning such vote by U.S. Mail, postage prepaid. Such voting by mail shall be done only in place of a meeting, and it shall not supplement any voting done at a meeting. Voting by mail shall be permitted only after each member of the Board of Trustees has received a written statement of the matter to be voted upon. A decision made pursuant to a vote by mail shall be effective only after receipt of votes in writing representing at least a simple majority of the total membership of the Board of Trustees in favor of such decision. The Secretary of the Board of Trustees shall notify each member of the Board of the results of such voting by mail as promptly as reasonably possible after he or she has completed his or her tabulation of such votes.

(b) **Action by Written Consent Without A Meeting.** Any action which may be authorized or taken at a meeting of the members of the Board of Trustees may be authorized or taken without a meeting in a writing or writings signed by Trustees who would be entitled to notice of such a meeting and who constitute more than fifty percent (50%) of the total number of Trustees, which writing or writings shall be filed with the records of the Corporation by the Secretary of the Board. Written notice of any action proposed to be taken by such written consent shall be sent to all members of the Board of Trustees not less than five (5) days prior to commencing the circulation of the action for written consent among the members.

(c) **Action by Electronic or Other Means.** In addition to the above referenced methods of voting, the Board of Trustees can also vote pursuant to the provisions of Ohio Revised Code Chapter 1702 as amended.

#### **ARTICLE 7: COMMITTEES**

(a) **Steering Committee.** The Corporation shall have a Steering Committee for the purpose of assisting the District Governors-Elect of each of the Districts in planning and

conducting the annual All-Ohio Presidents Elect Training Seminar in accordance with the By-Laws of Rotary International. The Steering Committee shall be composed of the Districts' Governors and Governors-Elect and such Past District Governors and/or District Governor Nominees as may be selected by the Districts up to a maximum of not more than five (5) total members from any one District. The Steering Committee shall adopt such Standard Operating Procedures as it deems appropriate for its functions in planning and presenting the seminar.

(b) **Governance Committee.** The Corporation shall have a Governance Committee for the purpose of negotiating contracts, review of risk management and insurance coverage issues, together with any other duties or responsibilities assigned to the Committee by the Board. Said Committee shall consist of at least three members of the Board as appointed by the Board. This Committee may appoint designee(s) to assist in negotiating contracts, including the purchase of insurance. This Committee or its designee(s) shall not bind the Corporation or the Board to any contracts or other agreements without two-thirds (2/3) majority vote of the Board.

(c) **Other Committees.** The Board may establish, and the President shall designate the membership and the functions of such other committees as the Board may deem appropriate and necessary from time to time.

#### **ARTICLE 8: ACCOUNTING AND AUDIT**

At the end of the accounting year during each of the first two years of the Treasurer's term the books and records of AOP shall be closed and a financial statement in the form of a review shall be prepared by a certified public accountant and presented to the Board. At the completion of the third and final year of the Treasurer's term the books and records of AOP shall be closed and shall be presented to an independent firm of certified public accountants selected by the Board for an audit conducted under generally accepted accounting principles.

**ARTICLE 9: AMENDMENTS**

This Code of Regulations may be amended at any meeting of the Board at which a quorum is present, by the affirmative vote of not less than two-thirds (2/3) of the Trustees present, provided that the proposed amendments shall be made a part of the written notice of such meeting.

**ARTICLE 10: SUPPLEMENTAL GOVERNANCE DOCUMENTS**

This Code of Regulations may be supplemented by various operating documents, including duties of various positions of the Steering Committee and as to the membership and general functions of the Steering Committee. These supplementary documents shall be subject to the terms and provisions of the Articles of Incorporation and this Code of Regulations. Amendments to the supplemental governance documents may be made at any Board meeting at which a quorum is present by an affirmative vote of a majority of the Trustees present provided that the proposed amendments shall be made a part of the written notice of such meeting.

**ARTICLE 11: DISSOLUTION**

Upon dissolution of the Corporation, the Board of Trustees shall, after paying or making provision for the payment of all liabilities dispose of the assets of the Corporation to the existing members, and to the extent possible, to be used for charitable, education, or scientific purposes. Any of such assets not disposed of shall be disposed of by the Court of Common Pleas of the county in which the principal office the Corporation is then located, exclusively for such purposes or to such organizations as the Court shall determine the same to be in compliance with the United States Internal Revenue Code that shall be in force and effect at the time of dissolution.



**ALL OHIO P.E.T.S., INC.**

***2021-2022 Conflict of Interest Policy***

**Article I. Purpose**

The purpose of this conflict of interest policy is to protect All Ohio P.E.T.S., Inc. from potential conflicts of interest that may benefit the private interest of a board trustee or that could create an excess benefit transaction. The intent of this policy is to supplement any applicable state or federal law that governs conflict of interest.

**Article II. Definitions**

**1. Interested Person**

All Ohio P.E.T.S. defines trustees, principal officers or committee members with powers delegated by the board who have a direct or indirect Financial Interest, as defined below.

**2. Financial Interest**

A person has a financial interest when they have any actual or potential ownership, investment or compensation agreement with All Ohio P.E.T.S., either directly or indirectly.

**Article III. Procedures**

**1. Duty to Disclose**

Related to any actual or potential conflict of interest, an Interested Person must disclose the existence of a Financial Interest. The board of trustees shall provide the Interested Person with an opportunity to disclose all material facts to the board and committees with governing board-delegated powers considering the proposed transaction or arrangement that poses a potential conflict.

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To aid the disclosure and serve as documentation, each board member shall complete a conflict of interest questionnaire at least annually, and more often as needed.

**2. Making a Determination of Conflict of Interest**

The board shall review each member's questionnaire and any other submitted disclosures for each principal officer, board member or committee member with governing powers. After an Interested Person discloses a potential conflict of interest, the board should request that person to leave the boardroom. The remaining board trustees shall then discuss the potential conflict of interest and vote on its existence.

**3. Procedures for Managing the Conflict of Interest**

After making a careful review of the facts, the governing board or committee shall make a determination on whether All Ohio P.E.T.S. would be able to make arrangements for a different agreement or transaction that doesn't produce a conflict of interest. During the discussions on the determination, the Interested Person shall not be present.

Seeing that no alternative transaction or arrangement is possible, the governing board or committee shall determine whether the transaction or agreement is in the best interests of All Ohio P.E.T.S. and is fair and reasonable for its own benefit.

The governing board shall make this determination by majority vote. The majority vote counts as the deciding factor on whether All Ohio P.E.T.S. shall enter into the transaction or arrangement.

**4. Disciplinary Action**

If the governing board or committee reasonably believes that an Interested person failed to disclose an actual or potential conflict of interest, they will inform the member and provide an opportunity for the Interested Person to offer an explanation about why he or she failed

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to disclose the conflict or potential conflict of interest. The governing board or committee shall take disciplinary action if they continue to believe that a conflict of interest still exists.

**Article IV. Records of Proceedings**

The minutes of the governing board and all committees with delegated powers shall contain the names of the persons who disclosed or were found to have a conflict or potential conflict, the nature of the conflict, any action taken by the governing board and the governing board's decision on the existence of the conflict. The record will also show the names of persons present for discussions and votes, alternatives to the vote and a record of votes taken.

**Article V. Annual Statements**

The officers of the board will ensure that each principal officer, trustee, and member of a committee with powers delegated by the board shall sign a statement that affirms that they received a copy of the conflicts of interest policy, have read and understood its contents, and agree to comply with the policy.

**Article VI. Periodic Reviews**

All Ohio P.E.T.S. shall operate in a manner consistent with not for profit purposes and shall not engage in activities that may jeopardize its tax-exempt status. The governing board or committee shall conduct periodic reviews to include such issues as whether transactions and agreements present potential conflicts of interest. The reviews shall also inquire about partnerships, joint ventures and other arrangements, and whether those arrangements conform to All Ohio P.E.T.S. written policies, including whether those arrangements are properly recorded and reflect reasonable investments or payments for goods or services.

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**Article VII. Use of Outside Experts**

The governing board or committee may use outside experts when conducting periodic reviews on conflicts of interest. When experts are used, their use does not replace the board's responsibility for conducting future periodic reviews.

All Ohio P.E.T.S., Inc.

**Name:**

**Date:**

\_\_\_\_\_  
**(Please print)**

**Title:**

**Signature:**

\_\_\_\_\_  
**(Please print)**

### General Chair

- Reports to:** AOP Trustees (President), and DGEs
- Interacts with:** DGEs, Trainers, Committee Chairs, Hotel Liaison / Facilities Chair, Treasurer, Registrar, Stage Manager / AV, SAA, Program Chair, and Steering Committee.
- Directs:** Aides, Facilities Chair, Sergeant-at-Arms/Program Chair, and Chairs on AOP committee.

**Objective/Purpose:**

With guidance and collaboration of DGEs, lead, orchestrate, and direct the AOP Committee Chairs and Steering Committee in delivering a productive All-Ohio Presidents Elect Training ensuring incoming Presidents Elect (PE's) are provided with an educational, inspiring, and bonding experience leading to a successful year as Club President.

1. Complete at least two years of Training with Multi District PETS Alliance.
2. Preside at all meetings of the Steering Committee in applicable Rotary Year.
3. Each year provide notebooks to new members of the Steering Committee and have all relevant information (current SOP, Steering Committee membership with contact information, meeting schedule, etc.) placed on the AOP webpage.  
**6600 Blue, 6630 Pink, 6650 Green, 6670 Yellow, 6690 Orchid  
AGs Orange, Committee members White**
4. Send out all Steering Committee meeting notices, six weeks in advance. DGE meetings as needed.
5. Appoint a Vice Chair, Secretary for Steering Committee, and Critique Chair-**prior** to the first planning meeting. (Vice-chair should be next year General Chair or from that District (of following year chair.)
6. Assist the Treasurer in preparation of the budget with the Facilities Chair and use as guide.
7. Prepare and distribute a Steering Committee Directory, including names, addresses, all phone numbers, including fax and e-mails by August of that year. Updating as needed.



8. Present questions for discussion with DGEs on possible changes in format or programs of All-Ohio PETS based upon the evaluation sheets of the previous year, the Board of Trustees, and/or from members of the committee forming the All-Ohio PETS Steering Committee.

**Program and Schedule:**

With DGEs, identify and come to a consensus on focus for their All-Ohio PETS, primary Training Areas for AOP Trainers to consider / include and identify early on in planning process the preferred speaker and VIP list.

1. Prepare as Chair and submit written invitations to requested Speakers on behalf of AOP.
2. Keep Steering Committee and operational Chairs of progress on all phases of AOP Planning and especially any area that he or she is responsible for.
3. As the vision begins to take shape, assign and/or share tasks key areas needed to deliver the program and agenda.
4. Provide a timeline enough to the Steering Committee, Registration, webmaster, and Trustees (at every opportunity), to publish promotional materials, update website, and begin to create awareness for each of the District's PE's and Leaders via the DGE's by mid-October.
5. Assure as planning progresses that Budget is adhered to. And, any unanticipated expenses/ plans by DGEs that require added funding are presented to the Trustees via President for approval.
6. Ensure that Trainers prepare publishable information as early as possible for promotional purposes and in detail by mid-December.

**Promotion and Communication**

The AOP General Chair has the responsibility and opportunity to communicate with all potential attendees and attendees of All-Ohio PETS the All-Ohio PETS through a series of letters that can be used by the DGE's with their Presidents-Elect. The first two letters for emailing (or by mail or posting on a District's Website as determined by each DGE) are letters to encourage attendance and supporting the goals of that year's AOP. The last expected letter is the Welcome Letter to All-Ohio PETSs which will be in the Printed or

Online Program and along with one welcoming letter signed by DGEs placed in rooms if decided on by the DGEs.

1. The **first letter** is provided to the current DG to be emailed by the DG to current club presidents and current AGs announcing the All-Ohio PETS and directing them to pass the information onto the Presidents elect and should include the web page address for registration. The first email should be sent out at least twelve (12) weeks in advance. Once the database includes email addresses for the club presidents as well as the presidents elect the email should be sent directly to the president with copy to DG.
2. The **second letter** is sent to the President-elect, AGs, DGEs and all committee members along with Registration forms, etc. This communication is to include a tentative agenda, dress code, parking fees, web page address, etc. The second email to the PE should be sent out at least nine (9) weeks in advance. *Prior to the emailing of these letters the DG and DGE must alert club presidents and presidents elect to permit reception of these AOP emails.*
3. The **third letter** is a welcoming letter to be placed in the guest room or given out with any registration materials on arrival. This is on PETS official stationery or Rotary International stationery with newly announced theme for that year. A similar letter is included in the printed Program from the General Chair after the letter from the Rotary International President Elect for their year and if appropriate the RI President that year if in attendance at all or part of the All-Ohio PETS.

**General Responsibilities of General Chair:**

Following are a collection of actions and responsibilities which at some time or another the General Chair will be involved in.

1. The DGE team will, at least 6 months prior to All-Ohio PETS, determine the program content of AOP (topics, speakers, conveners, etc.) and the topics to be covered in a district pre-AOP session to prepare PEs for AOP including the role and responsibilities of being a Rotary Club President, with advice from the Steering Committee; all decisions by DGE team will be final.



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2. Review hotel arrangements in conjunction with the Facilities Chair, and the Treasurer.
3. The General Chair is responsible for ensuring that a Spouse/Partner Program is organized by the DGEs and their spouse/partners. The DGEs can determine if Spouse / Partner Program is included in any given year. General Chair will follow up as directed.
4. Contact, one year in advance, the RI Director of Zone 30 which includes the full state of Ohio as of that AOP's Rotary Year and invite him or her with spouse/partner to the All-Ohio PETS. If a prominent speaker from RI is desired, the General Chair should ask the RI Director to make those arrangements.
5. Write formal letters of invitation to RI dignitaries attending, including background information on All-Ohio PETS, if necessary.
6. The Treasurer will pay expenses and the cost of the gifts for RI dignitaries as directed by GC who will have received that direction from the DGEs from the PETS receipts as determined by DGEs and subject to staying within the AOP Budget for that year. The Facilities Chair shall make arrangements with the hotel for amenities.
7. Work with DGE's to appoint an appropriate Current District Governor and partner to serve as aides to the Director and partner in attendance. If an official, other than a Director, is attending make certain that arrangements are explained to the individual prior to their arrival.
8. The General Chair should preside at two plenary sessions, Saturday morning and Saturday afternoon. The General Chair may designate someone else, if they desire. If there is a speaker from RI, other than the Director, the Director should be invited to make the introduction.
9. The General Chair shall ensure that the keynote speaker(s) is/are treated appropriately. This includes assignment of aides for the speaker(s) and spouse, arrangement for transportation, hotel accommodations including fresh fruit and flowers in the room. Arrange this through the Facilities Chair.
10. Preside at the Evaluation Session of All-Ohio PETS. Hear report from Critique Chair and discuss changes as indicated.
11. Post conference survey (the General Chair is responsible for sharing examples of the survey with the next General Chair and DGE planning committee).

12. Establish Steering Committee dates for the following year in conjunction with the incoming General Chair and Facilities Chair. This is usually done at the time of the evaluation session. Generally, there are three meetings scheduled. The first meeting is held the second week in September, the second meeting during the second week of November and the third in early January (be sure to take the OSU football schedule when setting dates). *If the current or incoming General Chair feels it is necessary, they can choose another meeting time, prior to September or before PETS. Traditionally these meetings are held at 10:00 A.M. - Noon, at the site for the All-Ohio PETS.*
13. Write thank you letters to all committee chairs and to the visiting Rotary dignitaries for their contributions to the success of the Institute.

Rotation by year of General Chair and other Key AOP Leadership Roles will be as follows:

Rotation for	2020	2021	2022	2023	2024	2025	xxxx
<b>General Chair</b>	6600	6650	6690	6670	6630	6600	xxxx
<b>Operations</b>	6650	6690	6670	6630	6600	6650	xxxx
<b>Program</b>	6690	6670	6630	6600	6650	6690	xxxx
<b>Registration</b>	6670	6630	6600	6650	6690	6700	xxxx
<b>Sgt at Arms</b>	6630	6600	6650	6690	6670	6630	xxxx

**Additional Actions required by the General Chair:**

1. The General Chair will assign an appropriate dignitary to officiate at the Commissioning Ceremony.  
If the RIPE is in attendance, then he or she will conduct the commissioning of the Presidents Elect.
2. The GC shall provide the dates and venue for surrounding PETS for the benefit of those Presidents-elect that cannot attend All-Ohio PETS.
3. Pre-order in the fall the largest (approximately 4-6 feet high and 19-20 feet long) Rotary International Presidential theme banner per DGE preference and Trustees approval.
4. The General Chair should provide observations and recap the planning experience with the incoming General Chair while the information is top of mind to assure any issues are corrected or tweaked as needed for the next year All OH PETS.



## District Governor-Elect Duties

**Report to:** AOP Trustees\ AOP General ChairAOP General Chair

**Direct and Guide:Interact with:** AOP General Chair. All Steering Committee Members as needed. Registrar as needed, each of the other DGEs. All AOP DGEs '

**Objective/ Purpose:** To lead and assure AOP General Chair has the most current Theme and guidance as to what goals and priorities All Ohio PETS DGEs prefer for their AOP year. To deliver with the AOP Chair and committee a successful All Ohio President Elect Training for all PE's in the state of Ohio.

Meet with the General Chair and fellow DGEs in soon after the General Chair training occurs to give direction to the committee as to your goals for All Ohio PETS. The committee will then proceed to make the All Ohio PETS seamless for you.

1. Attend and participate in **ALL** Steering Committee meetings.
2. Be sure that the DGN and DGND attend all planning meetings.
3. The DGE team will determine the program content of AOP (topics, speakers , conveners, etc.) and the topics to be covered in a district pre-AOP session to prepare PEs for AOP including the role and responsibilities of being a Rotary Club President, with advice from the Steering Committee; all decisions by the OGE team will be final.
4. Have the district's facilitators for AOP in place for the year of service by the second meeting.
5. Provide the Sergeant at Arms Chair with the names, phone numbers, email addresses and availability of five people from your district who are members of the Steering Committee and other members as appropriate.
6. Assign a PDG, from their district, to serve as Chair of the committee assigned for that year based upon each individual district's operating procedure.
7. Separate personal letter from each DGE and spouse to PE and spouse.
8. **Actively promote the attendance of every PE and their spouse/partner** if applicable for our district. Mail separate personal letters from the DGE and spouse/partner to the PE and her/his spouse/partner explaining AOP and encouraging attendance. If the PE cannot attend, encourage the PE to attend a PETS program in another state or to have an alternate attend AOP for the benefit of information and training.

9. Encourage the Rotary Club to pay the expenses for the PE and partner to attend the All Ohio PETS program, including registration, meals and hotel. \*As recommended by their district guidelines.
10. Encourage the spouse/partner of the DGE to participate in the planning and/or execution of the Partners Program, including decision about a service project.
11. Provide three metal easels, clean "post it" paper for the easels and 12 new large markers labeled with your district number. Give them to the Rotary Guide chair Friday afternoon.
12. Provide pins for the Commissioning Ceremony for PE and spouse.
13. Each DGE shall provide all necessary reference materials in a timely fashion to all district volunteers who will be providing program support at AOP.
14. Determine the nature of the banners for DGE tables at registration. Should they have only the DGE picture or include a spouse/partner. These have been prepared by a vocational school in District 6650.

District Number	DGE Name / Year	DGE Email	DGE Cell or Phone
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DGE 06600:

DGE D6630:

DEG 06650

DGE 06670:

DGE D6690:

### Facilities Chair

**Reports to:** All Ohio P.E.T.S. ("AOP") General Chair and District Governors-Elect ("DGE's")

**Interacts with:** General Chair/DGE's, AOP Steering Committee, Governance Committee, Contracted meeting/lodging venue(s), Operations Chair, Registration Chair, Sergeants-At-Arms Chair and AOP Board of Directors as may be required

**Directs:** Hotel/Venue Staff

**Objective/Purpose:** The Facilities Chair (FC) functions as the primary contact between the contracted hotel/venue and any other facility required for lodging and meeting space to conduct AOP. They are responsible for overall logistics and ensuring attention to quality and alignment with the specific needs and focus of the DGE's.

1. The FC will continually monitor the venue(s) to ensure adherence to the contracted arrangements. Alternately, they are responsible to inform the AOP Steering Committee, inclusive of the General Chair/DGE's, of contract deadlines relative to guarantees, monitoring of the room block and corresponding deadlines, etc. The FC may provide guidance to the Governance Subcommittee when new venues or other meeting facility contracts are being negotiated. The FC may also investigate and suggest venues for future PETS as requested by the AOP Board of Directors.
2. The FC may appoint an assistant in consultation with the AOP Steering Committee. Any expense implications for the position must be discussed in advance and necessary approval obtained from the AOP Board of Directors prior to the appointment.
3. The FC will work directly with the General Chair to confirm available complimentary meeting space at the venue for each AOP Steering Committee meeting to be scheduled on site. The FC will arrange for all food and beverage as

directed by the General Chair which may but is not limited to, a continental breakfast, coffee breaks and under special circumstances, a luncheon. One week in advance of each Steering Committee meeting, the DGE's are to advise the FC of the number attending from their individual districts in order for the FC to provide a guarantee to the venue. Food and beverage charges are included in the Operating Budget.

4. The FC is responsible for tent cards for the AOP Board and Steering Committee meetings and after consultation with the General Chair, the ordering of AOP Board and Steering Committee badges.
5. It is recommended the FC consult with potential exhibitors who are approved RI vendors to obtain the best pricing for the badges. In some instances, consideration has been given to reduced exhibit space fees in exchange for favorable pricing.
6. The FC will make all arrangements directly with the venue for all food and beverage to be served during the conference and ensure the corresponding costs conform to the contracted pricing. The FC will make menu suggestions to the General Chair/DGE's for their approval for banquets, coffee breaks and general receptions always in consideration of religious (i.e. Friday night entrée options during Lent) and/or other dietary restrictions and themed events. These decisions are always guided by the overall AOP program structure.
7. Once the overall AOP program structure with corresponding time frames and the meal selections have been approved, the FC shall communicate same to the venue for incorporation into the venue's Beverage and Event Orders (BEO's). Once completed, the BEO's are to be provided to the General Chair for review.
8. The FC will consult with the General Chair/DGE's and, if needed, the AOP Steering Committee on the assignment of all Hospitality Suites.
9. The FC will follow Rotary International protocol in making seating assignment recommendations for meals and communicate these in advance to the General Chair/DGE's Steering Committee, Operations and Sergeant-At-Arms Chairs.



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Should a Senior Leader/VIP be present for more than one meal, he/she will be rotated with their Aide from district to district to afford the greatest visibility for all Presidents-Elect.

10. The FC will coordinate with the RI Merchandise Vendors for their participation including fees to be paid as approved by the AOP Steering Committee), exhibit space requirements, electrical needs, etc. The FC will also negotiate "in kind" agreements, when needed, in exchange for complimentary exhibit space. The FC will also confirm display needs of RI/TRF Staff, DACdb, Club Runner, ShelterBox, and any others as directed by the General Chair/DGE's always keeping in mind available space limitations.
11. The FC meets with all key venue personnel for the purpose of educating them about the All Ohio P.E.T.S. program, and to gain knowledge as to who will assist with the various needs during the weekend. The FC will make arrangements for key staff to attend at least one-person Steering Committee meeting. Unless otherwise stipulated by the General Chair, the FC is the only person authorized to request items, change guarantees, etc. with the venue staff that will require or incur any additional fees.
12. The FC will obtain banquet/meeting room set-up recommendations from the General Chair, DGE's, Stage Managers and Trainer(s) and work with the venue to develop floor plans for approval. They will also develop a floor plan in consult with the Operations Chair for the registration and vendor/display area (being sure to include DGE requirements) inclusive of the needs of the Registrar, Treasurer and Sergeant-At-Arms. In addition, the FC is responsible for always ensuring adequate number of tables (banquet and otherwise), chairs, easel stands, waste baskets, table stands needed with the hotel.
13. The FC will assist any DGE who wishes to conduct Pre-PETs training on site with the contracted AOP venue and coordinate any other on-site meetings, not part of the official AOP agenda, and make arrangements for those expenses be billed separately.

14. The FC will work directly with the hotel to ensure the BEO's (Beverage and Event Orders) are accurate and conform to the agreed upon menu's, room sets, vendor/display requirements, and timing for each. The FC is responsible for providing all final guarantees to the venue after conferring with the Registration Chair and then the General Chair.
15. The FC will obtain from the Aides to VIP's and invited speakers the arrival and departures days and times to the venue, special sleeping room or dietary needs, and make the necessary arrangements and place those on the master account as has been pre-determined (A/V requirements are to be communicated directly to the Stage Managers). All to be confirmed with the General Chair as well as which VIP's are designated for room amenities. All exhibit staff for vendor/displays are expected to make their own lodging arrangements unless otherwise noted.
16. FC to receive on site during set-up, any welcome banners or other signage requiring the assistance of the hotel/meeting venue for installing or hanging.
17. The FC is responsible for organizing the Pre-con meeting with the venue and their key staff and notifying the General Chair and any other individuals pre-determined that should be in attendance. These meetings are historically held the morning of set-up.
18. The FC will report each morning to the Registration Chair and the Treasurer the number and type of meals available each day to be sold "over and above" the food and beverage guarantee.
19. The FC will do the initial review of every detail of the AOP venue invoice and then share with the General Chair to confirm corrections or amendments as may be needed. The FC will then contact venue for acceptance and modification of the billing as required. The bill will not be forwarded to the Treasurer for payment until such corrections are received. If the hotel delays in their acceptance of the changes to the billing, the General Chair will be notified immediately, and the venue advised that payment cannot be initiated until a final bill has been issued so as to not incur any late penalty.



## Operations Chair

**Reports to:** All Ohio P.E.T.S. ("AOP") General Chair and District Governors-Elect ("DGE's")

**Interacts with:** General Chair/District Governors-Elect, Sergeants-At-Arms Chair, District Trainer(s), Facilities Chair, Registration Chair, Designated Printers

**Directs:** N/A

**Objective/Purpose:** The Operations Chair (OC) is assigned the responsibility for the procurement of all printing, general supplies and outside services as may be required for AOP. The Chair works in close communication with the Sergeant-At-Arms Chair (SAAC) to ensure as smooth an operation as possible during the actual event. The OC may wish to share the SAAC table in the registration area to better coordinate on site duties and overall flow with the Facilities Chair. *On a mutually agreed basis, it is permissible to share oversight of responsibilities between these two committees with approval and knowledge of the General Chair/DGE's.*

The list of suggested print items needed, or as designated by the DGE's, varies from each year. The OC should contact the SAAC for an inventory of materials in their possession that are compiled at the end of each AOP and consolidated into one location. The OC should find out who has supplied the printing services previously for consideration. The following is an overview of items the OC is generally responsibility for; no expenditures can be made without prior approval by the General Chair or AOP Steering Committee.

1. Order supply of AOP letterhead and envelopes as may be required though often the General Chair will use their District Governor stationary for their letters. If there is a general template available in word, for both letterhead and envelopes, this can be easily updated each year without additional expense.
2. Based on inventory conducted by the Registration Committee, order badge stock (historically a minimum of 520 has been required) and committee/speaker

ribbons if desired. Registration may choose to order their own stock, and this will be confirmed between the two committee chairs.

3. Operations will have the following materials printed or made available on site:
  - a. Letter of Welcome from AOP Steering Committee to be included in the registration envelopes hotel or Pre-PETS venue).
  - b. Maps and brochures of local places of interest.
  - c. Any materials that are used to support the presentations by the speakers in the general sessions or training rooms as coordinated by the Trainers (camera-ready copy to be provided if printing is required). Aides to the general session speakers are responsible for items to be printed in advance.
4. As pre-determined by the District Trainers, purchase binders for the discussion leaders, though most materials are now provided online. Historically, 5/8" works well.
5. Confer with the SAAC to ensure enough vests (or other agreed upon identification items) are currently in inventory for use at the upcoming AOP to accommodate the overall programming structure, layout and logistics.
6. Responsible for acquiring place card stock for district tables at General Sessions which are color-coded to match the individual badge stock and pre-printed with each district number on them (12 up on 25# card stock). Heavier tent card stock (11" x 4.5" folded) and markers should be provided for use in each Training Room; Trainers(s) to provide quantities to OC each year. Attendees will each make their own name cards. This card stock may be pre-printed by the designated printer "on both sides" with the name of each presenter/speaker ONLY if so required. OC will check inventory prior to ordering additional stock.
7. Be responsible for tracking all signage in consultation with the Facilities and SAAC including welcome banners, directional signs, daily schedules which are to place in strategic locations, etc. At that time, in consultation with the SAAC, determine what must be updated or replaced and obtain necessary approval before having them produced.



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8. Provide "Wedding Style" place cards for each DG, DGE, DGN, Spouse/Partners, Dignitaries, Speakers, Aides and Special Guests as may be needed. They should be printed on both sides and extra blanks should be available on site for last-minute seating as may be required. Place cards are to be given to the Sergeant-At-Arms and Operations Chair by the Facilities Chair with table location for each meal and corresponding seating chart for each meal so Sergeants at the entrances can guide seating as well.

### Program Chair

**Reports to:** AOP Program Chair

**Interacts with:** DGEs, Trainers, Printing Agency, DGE Program representative, Committee Chairs, Hotel Liaison / Facilities Chair, Treasurer, Registrar, Stage Manager / AV, Spouse/Partner Program Chair, AOP Webmaster and Steering Committee.

**Directs:** **Overall Production of the All Ohio PETS Program Book**

**Objective/Purpose:**

With guidance and collaboration of the DGE Program representative and the Printing Agency, Collect and organize all information and scheduling material that will appear in the printed and/or virtual program. This requires continuous communication with the chairs of all PETS areas, the Steering Committee members and the DGE of the five Ohio districts leading to a professional and motivating program.

1. Identify Printing Agency, quantity, and obtain a quote for approval by the AOP Board.
2. Obtain from the assigned aide a picture, accurate biographical information and presentation title for each speaker and presenter for inclusion in the program. Pass the information onto the Facilitator for each session, the AOP Webmaster to post to social media outlets, and the Printing Agency.
3. Establish a spreadsheet/production schedule for the program booklet (sample included at the end of this section).
4. Coordinate with the webmaster to ensure that the program schedule on the website, in the program book, and program app if applicable are the same.
5. Acquire the list of Facilitators from the Facilitator Trainers. Assure that facilitator trainer and registration know the size and names of the clubs of each district to assist in the clustering of the discussion groups.
6. Acquire Partners Program information from the Chair of the Partners Program for inclusion in the All-Ohio PETS Program.

7. In conjunction with the DGEs prepare a tentative time schedule or a “minute by minute” document {the General Chair is responsible for sharing examples of the minute-by-minute and/or time line with the next General Chair and DGE planning committee} of primary functions of each area for PETS to be submitted to the full Steering Committee by the second planning session for review, modification, and ultimate final approval.
8. Provide a layout of the hotel, in conjunction with the Facilities Chair, with room assignments for all sessions for the last AOP preparation meeting prior to All-Ohio PETS.
9. Prepare a program summary, including partner program, to be included in an email to DGEs, PEs and all other relevant Rotarians and to be placed on the AOP website.
10. Email a copy of the program draft to the steering committee at least one week prior to the February meeting.
11. Prepare final copy of the program will be printed and will be made available on the website and other electronic platforms. Program will have an appropriate cover, contain the dignitaries’ pictures and bio, and have an easy to read format for Presidents Elect and Spouse/Partner Program.
12. Write a thank you note following PETS to presenters, keynote speakers, DLs, and any other program participants not contacted in a similar letter from the General Chair. This is a simple, but important courtesy, not to be overlooked.

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## All Ohio P.E.T.S. Presidents-Elect Training Seminar

<b>Program Item</b>	<b>Responsible Person</b>	<b>Date Received</b>	<b>Notes</b>
Letter from Rotary International President Elect			
Pic - RIPE			
Bio - RIPE			
Picture DGE 6600			
Picture DGE 6630			
Picture DGE 6650			
Picture DGE 6670			
Picture DGE 6690			
Bio - Friday Speaker #1			
Picture - Friday Speaker #1			
Bio -Zones 30/31 Rotary International Director			
Pic - Zones 30/31 RID			
Bio - Friday Speaker #2			
Pic - Friday Speaker #2			
Bio - Saturday Speaker #1			
Pic - Saturday Speaker #1			
Bio - Saturday Speaker #2			
Pic - Saturday Speaker #2			



AOP Coordinating Committee			Need in a word document
AOP Committee Members			
Aides to Speakers			
Schedule			
Cluster Group Facilitators			
Group Assignments			
Language of Rotary		Have	Same as last year.
Notes		Have	Same as last year.
Rotary's Area of Focus		Have	
2021-2022 Theme Logo		2/2/2021	
Quotes for Back			
Join Leaders, Exchange Ideas, Take Action		Have	Change to People of Action

## Registration Chair

<b>Reports to:</b>	General Chair, DGEs
<b>Interacts with:</b>	Webmaster, Treasurer, Steering Committee, Facility Chair, Training Coordinator
<b>Directs:</b>	Guests, Participants

### Objective/Purpose

The Registration Chair (Registrar) works in conjunction with the Webmaster, Treasurer, DGEs, and Steering Committee. Each position has specific responsibilities, and timelines. The due dates help ensure that the registration process and website content can be developed and posted on time.

1. The **Steering Committee** needs to establish the program schedule, events details, cutoff dates, and prices. Final decisions on these items are needed 90 days prior to the start of the event, e.g., December meeting.
2. The **Facility Chair** should have the contracted facility prices provided at the September meeting. Meal choices need to be provided 90 days prior to the start of the event. Hotel room rates and registration codes are also needed 90 days prior to the start of the event.
3. The **Training Coordinator** needs to provide the Webmaster the number of breakout rooms needed, room capacity and trainer names 60 days prior to the start of the event.
4. The **DGEs** need to identify each of their PE. For DACdb districts, the DGE will need to ensure the PEs are properly identified, (including e-mail) in DACdb 60 days prior to the start of the event. If any club does not have a PE selected, the DGE will notify the Registrar. For non DACdb districts, the DGE will supply the complete contact information of their PEs to the Webmaster 90 days prior to the start of the event. The DGE is responsible for the attendance of their PEs and should follow-up with those not registered prior to the registration deadline.

5. The **Treasurer** should have prior year event final figures available for the first meeting, generally in September for meaningful discussion and informed decisions. During the registration process the treasurer handles registration fees.
6. The **Webmaster** maintains the AllOhioPETS.org website. The website should include AOP details, registration information, and serve as communication between AOP committee and the AOP attendees.
  - The Webmaster maintains the DACdb database with updated information provided and ensures that registration information is communicated on the website. The DGEs are provided access to the database for purposes of monitoring their District registration. The Webmaster will set up the DACdb registration program. The website will include the event schedule, planned activities and prices.
  - The Webmaster in conjunction with the Treasurer will establish a supported payment gateway to receive credit card payments.
  - 70 days prior to the AOP event, the Webmaster sends registration instructions and hyperlinks to the Registrar who communicates with the DGEs that the registration process is open.
  - The Webmaster monitors registration for potential concerns and communicates with the Registrar. The online registration system will send an e-mail acknowledgement to each registrant.
  - The online payment system will send a separate acknowledgement to those who pay by credit card. Checks will be mailed to the Treasurer who will post the payment to the registration.

#### **TIMELINE**

- **Five weeks out** the Webmaster works with the Registrar, Training Coordinator, and Facility Chair for current attendance counts.
- **20 days out** those registered with open invoices (unpaid invoices) will be mailed a reminder that their payment is due.
- **10 days out** Presidents-elect are assigned to cluster groups based on parameters established by the Training Coordinator. A recap of all registrants assigned will be provided to the Trainer and DGEs.
- **7 days out** the Registrar receives the AOP badge list.

7. At the **first meeting** the Registrar communicates with each DGE to collect from the non-DACdb districts, the content information of their Presidents-Elect, Assistant Governors and Facilitators. This is given to the Webmaster.
  - **On-going:** The Registrar reviews registrations on a weekly basis looking for potential discrepancies and will contact registrants to rectify issues/concerns. The Registrar will field questions from registrants. The Registrar works with the Webmaster to deal with any potential system concerns and ensures that those who do not register using a DACdb profile (guests and non DACdb Districts) are assigned to their correct DACdb profile.
  - **20 days out:** Print meal tickets (Yellow=chicken; Red=Meat; Orange=Fish; Green=Vegetarian) Obtain and print welcome letter from Chair of the Steering Committee. The letter will be added to the Registration Packet. Obtain name badge topper (business card size) from Program Chair.
  - **8 days out:** Upon receiving badge lists from the Webmaster the Registrar will print name tag inserts using the following paper colors: 6600 Blue; 6630 Pink; 6650 Green; 6670 Yellow; 6690 Orchid; AGs Orange; Committee Members, Speakers, and special guests White.
  - **6 days out:** Assemble name badges and registration badges.
  - **3 days out:** Receive final registration list from Webmaster. List should include total registrants from each district including names, club ID, meal count, meal choices. Included should be participant breakdown: PEs, PDGs, DGs, DGEs, DLs AGs, Committee Members and others as needed.
  
8. Complete **Registration Packets** which should include the following: Badges, PE and Partner/Spouse names, program welcome letter, meal tickets and any additional information agreed upon by all DGEs. Packets should be boxed by district and alphabetized by club name. Balance due packets will be filed separately. Each DGE will receive a box with registrations for his/her respective district. Registration packets for special guests and speakers will be available at the registration table.
  
9. Packets with a "Balance Due" or refund should be given to the PETS Treasurer.

The Treasurer will be located at a separate table to facilitate the transactions. Establish cut-off date for refunds. The Registrar staffs the registration desk at AOP during the event to handle late registrations, badge corrections or registration questions. The Registrar and Treasurer will collect fees and sign in last minute registrants throughout the event. A computer and printer will be provided by the Registrar for this purpose.

10. The **Registrar** takes possession of supplies from the previous Registrar at the close-out meeting following the event. The Registrar will inventory supplies to ensure adequate quantities are available for the following year. Some items may be owned by AOP, e.g., name badge holders and paper cutter. Some items may be provided by the Registrar's District, e.g., Computer/Laptop, printer, internet access, paper supplies, name badges, registration packet envelopes and general office peripherals (scissors, take, stapler).
11. The Registrar communicates with the Treasurer regarding potential budget requests based on inventory needs.
12. At the end of the AOP event unused materials will be turned over to the Steering Committee.

### Sergeant-At-Arms

**Reports to:** All Ohio P.E.T.S. ("AOP") General Chair and District Governors-Elect

**Interacts with:** General Chair/District Governors-Elect, Operations Chair, Facilities Chair, Registration Chair, District Trainer(s), Designated Printers, All AOP Attendees

**Directs:** Volunteer Sergeants-At-Arms

**Objective/Purpose:** The Sergeant-At-Arms Chair (SAAC) is responsible for obtaining in advance a working list of Volunteer Sergeants-At-Arms (SAA's) and organize their participation in such a way that supports all aspects of the AOP programming. Further, the SAAC is responsible for properly educating the SAA's about their responsibilities in advance and managing their participation on site during the event. Ultimately, the role of the Volunteer SAA is to assist in maintaining an orderly and dignified event and at the same time ensure all Rotarians and guests have a positive and enjoyable experience in a safe environment. The SAAC should completely familiarize themselves with the layout of the hotel/meeting venue.

1. Work with DGE's and local "host district" to obtain sufficient number of Volunteer SAA's to cover all aspects of AOP programming as defined below. SAA assignments on Friday can sometimes be filled by registered AOP participants who otherwise have no other responsibilities.
2. Request of the General Chair/DGE's, as may be needed, a budget allocation to cover meal costs for SAA's who have been assigned from the local district who are not otherwise attending AOP.
3. Prepare an assignment sheet of duty stations with times and names of the responsible individual(s) along with cell phone numbers. (sample schedule included at the end of this section).





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4. **Communicate in advance with all Volunteer SAA's complete details about their prescribed assignments, time frames and corresponding duties; arrival time on the day of their assignment and how to communicate with SAAC if they are unable to participate due to an unexpected conflict; on site emergency procedures as agreed upon with the hotel/meeting venue. (sample Volunteer Email included at the end of this section).**
5. **Have materials such as tape, zip ties, scissors, string, duct tape and extra markers available for use on site.**
6. **Oversee the distribution of the large tent cards to the Trainers and/or Facilitators of each group breakout. Have extra's available.**
7. **Oversee placement of reserved seating cards (provided by Operations Chair) for each General Session/Banquet and colored district table signs according to Facilities Chair assignment sheet. Collect all immediately after conclusion of event to be reorganized for next seating. Have extra's for emergencies.**
8. **Work with Facilities Chair and OC to select a location for Lost and Found items and communicate same to Volunteer SAA's and others as needed.**
9. **Meet with all Volunteer SAA's upon arrival at the hotel/meeting venue for their assignment, recap their duties, any changes to the emergency procedures, procedures for obtaining counts, and answer any last-minute questions.**
10. **Responsible for placing easels/flip charts/markers provided by the DGE's at each breakout or group meeting location as well as directional signage to guide attendees to the proper location. Retrieve signs at the end of the day and/or end of AOP and return to the respective DGE the easels/flip charts/markers.**

11. Assign at least one Volunteer SAA at each hotel entrance as a greeter, in proximity to the hotel registration desk, and the escalator - top and bottom. Saturday only one SAA is needed near hotel registration/entrance until 12:00 noon.
12. Assign one Volunteer SAA to be responsible to the Chair of the Spouse/Partners Program. This SAA to be available to answer any questions about the program or obtain other resources as may be needed.
13. Have two Volunteer SAA's in the area of the Registration Desk on Friday afternoon and all-day Saturday.
14. Ensure in advance that there is a Rotary bell/gavel on the stage in the banquet room for the General Chair and/or convener.
15. Provide bells and or chimes for use by the Volunteer SAA's to be rung prior to each session to alert attendees that the session is about to begin.
16. Take attendance at all sessions of AOP including General Sessions, Banquets, all breakout sessions inclusive of Presidents-Elect, Spouse/Partners, Assistant Governors, etc. Inform the General Chair of any necessary "housekeeping" announcements prior to each General Session. Note: recording of attendance at meals is particularly important as the counts are used to confirm the hotel's billing for meals. These counts are to be maintained in a master document by the SAAC and given to the General Chair at the conclusion of AOP.
17. At conclusion of AOP, in conjunction with the OC, collect all materials used in the conduct of the Program and update the Inventory List accordingly that describes items contained in the storage container which will be given to the SAAC for the following year to take with them. This includes, but not limited to banners, signage, vests, bells, office supplies, remaining tent card stock, etc. If other items/materials are being stored elsewhere, then that

should be referenced on the Inventory List as well. (See the most current Inventory List included at the end of this section).

**SAMPLE 2020 AOP LETTER  
VOLUNTEER SERGEANT-AT-ARMS INSTRUCTIONS:**

**Good afternoon:**

**On behalf of all of the RI Districts in the State of Ohio, we first wanted to express our appreciation to each of you for your assistance with the upcoming 2020 All Ohio PETS, March 13-14 at the Columbus Renaissance in Downtown Columbus. Without the assistance of those from District 6690, it would be nearly impossible to be able to properly handle this critical aspect of the event. Thank you for your "Service Above Self" and being such excellent ambassadors for Columbus and your district.**

**This year, we are coordinating Sergeants-At-Arms (SAA's) with Operations responsibilities. PDG Scott Schulick from District 6650 is chair of Operations for AOP and me, PDG Beverly Ghent-Skrzynski from District 6630, is serving as the chair of the Sergeants-At-Arms.**

Scott and I realize that a number of you have volunteered in the past, but we wanted to **review some of the duties in advance** to answer questions regarding the SAA role as each year is a bit different.

**FYI - Saturday breakouts include sessions for Presidents-Elect (by club size in the a.m.), PE Spouse/Partners and Assistant Governors. This year the Presidents-Elect have a select group of electives in the afternoon that they have signed up for in advance – that is one of the differences for this year. All sessions are again identified on the attendee badges. Please go to <https://www.allohiopets.org/program-and-speakers/> for a copy of the program for both days.**

1. **Assignments:** Attached is an overview of the assignment list - additional information will be provided on site. If due to an unforeseen circumstance you find you can no longer assist – please find a replacement if time allows, but otherwise please call Bev’s cell phone (xxx-xxx-xxxx) as soon as possible and leave a detailed message.
2. **Arrival:** Please arrive 15 minutes before your shift begins and check in with the Sergeants-At-Arms/Operations Desk to confirm your assignment and pick up your SAA vests. We are located on the 2<sup>nd</sup> Floor Foyer outside of the middle entrance to the Woody Hayes Ballroom. Please do not forget to check back in at the end of your shift(s) and return your vests, etc., to the same location.
3. **Signage:** In addition to a new Welcome Banner, this year we have added poster-sized signage to strategic locations in the hotel with an overview of the schedule to assist everyone with “where they need to be and when.” Signage is also being produced with guidelines provided by the State of Ohio Health Department/ Seneca County Health District for “gathering groups” for help in keeping everyone safe. (Thanks to Craig Maxey for all of his assistance with this.)
4. **Emergency Procedures:** For Medical Emergencies, contact 911 first and then immediately notify the Hotel Front Desk AND THEN a member of the AOP Steering Committee (committee has special badges and includes both Scott and me).
5. **Doors Open-Checking of Badges:** For Friday evening/Saturday luncheon/Saturday dinner, those SAA’s who are controlling the entrances to the ballroom – doors are to remain closed until given the “all clear” by either Scott or myself. Saturday morning tends to be more fluid though we do have Rotary License Plate promo’s that need to be placed on all of the chairs of the attendees before the doors open. We will show you samples of the badges upon arrival (meals tickets as needed are inserted in the back). We also have small bells to be rung by our SAA’s to call attendees to begin lining up for the banquets/general sessions or call attendees “back to their sessions” following breaks.
6. **Lost & Found:** Please bring items to the SAA/Operations Desk.

7. **Attendee Counts:** We will need assistance in providing banquet/general session counts and counts for the Saturday afternoon elective sessions. For those located at the entrance to the ballrooms, please discuss on site. All counts should be reported to the SAA/Operations Desk where a master list will be maintained. Facilitators are handling the counts for all of the morning breakout sessions.
8. **Meals:** For those of you who are working the Saturday breakfast and luncheon as you were advised, AOP is covering your meals during that time frame; for Friday (SAA's are scheduled to depart at 8:00 p.m.) please let us know if you plan to eat; for Saturday evening your shift ends at 7:00 p.m. so please let us know if you plan to stay after for dinner. **Please let us know no later than Wednesday morning via email if you plan to eat dinner on Friday or Saturday.**

**Thank you again for your assistance, do not hesitate to contact us if you have any questions.**

***Bev and Scott***

PDG Beverly Ghent-Skrzynski (District 6630)

Sergeant's-at-Arms Chair

PDG Scott Schulick (District 6650)

Operations Chair

SAA/Operations Inventory for 2020 All Ohio PETS

- 100; 4.25" x 11" white Tent card stock (PDG Craig Maxey/D6690 was to provide additional 400 on site)
- 3 Sergeant-At-Arms Armbands – small supply of temporary handwritten SAA badges
- Supply of magic markers – 4 red; 2 green; 1 brown; 2 green; 3 blue; 15 black plus
  - newly purchased markers in 2019
- Duct tape/Scotch tape/Post-it Notes (some newly purchased in 2019)
- Small supply of colored construction paper and assortment of paper clips/binders/stick pins
- 7 dinner bells
- Signage for the districts for the banquet tables (was more than enough for 2020 – will probably need reorder after next AOP):
  - Blue 50
  - Green 27
  - Pink 58
  - Purple 56
  - Yellow 55
- 1 small plastic directional sign
- Miscellaneous file folders from past AOP's (has been cleaned out)
- Note: To be added to this container: new order of vests, SAA buttons from RUH and any remaining inventory of tent cards, Ohio License plate promos and need to determine who is responsible to take the new "welcome" banner and other signage that Craig Maxey has created for AOP - some of which can be reused from year-to-year.

BGS: 12-6-19

Rev. 3-4-2020/replacement items purchased



**SAMPLE - 2020 AOP SERGEANT-AT-ARMS SCHEDULE**

Friday _____ (Date)				
Time	Location	Responsible Person	Email Address	Cell Phone
1:00 PM - 3:00 PM	Lobby			
	Lobby			
	2 <sup>nd</sup> Floor			
3:00 PM - 5:00 PM	Lobby			
	Lobby			
	Lobby			
	2 <sup>nd</sup> Floor			
	2 <sup>nd</sup> Floor/Float			
5:00 PM - 8:00 PM	Lobby			
	Ballroom A			
	Lobby			
	Ballroom B			
	Lobby			
	Ballroom C			
	Lobby			
Ballroom D				
Lobby				
Ballroom E				
Float				
Saturday _____ (Date)				
Time	Location	Responsible Person	Email Address	Cell Phone
7:00 AM - 10:00 AM	Lobby Ballroom A (D6600)			



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	Lobby Ballroom B (D6630)			
	Lobby Ballroom C (D6650)			
	Lobby Ballroom D (D6670)			
	Lobby Ballroom E (D6690)			
10:00 AM - 1:00 PM	2nd Floor Ballroom A			
	2nd Floor Ballroom B			
	3rd Floor Ballroom C			
	3rd Floor Ballroom D			
	AG Ballroom E			
1:00 PM - 4:00 PM	2nd Floor Ballroom A			
	2nd Floor Ballroom B			
	3rd Floor Ballroom C			
	3rd Floor Ballroom D			
	AG Ballroom E			
4:00 PM - 7:00 PM	Lobby Ballroom A (D6600)			
	Lobby Ballroom B (D6630)			
	Lobby Ballroom A (D6600)			
	Lobby Ballroom B (D6630)			
	Lobby Ballroom C (D6650)			
	Lobby Ballroom D (D6670)			
	Lobby Ballroom E (D6690)			



**Rotary**

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### Treasurer Duties

**Report to:** AOP Board of Trustees

**Interacts with:** AOP Steering Committee

**Directs:** N/A

**Objective / Purpose:** Assists the AOP Board of Trustees and the AOP Steering Committee in financial planning and budgeting, maintaining financial accounts, records and information, and preparing tax filings.

1. Represent All-Ohio P.E.T.S., Inc. ("AOP") in a professional manner as to the revenues of the AOP event and the related expenditures. The fiduciary responsibility is critical to maintaining the four-way test of Rotary in all respects.
2. The Treasurer shall be responsible for establishing all banking relationships, including checking, savings, credit card accounts and on-line or electronic payment platforms in the name of AOP for a repository of fees and income collected and from which the bills appropriately submitted by the various leadership Presidents can be paid in a timely manner.
3. There shall be at least three (3) signatories on financial accounts, including the Treasurer, the President of the Board of Trustees and the Vice President of the Board of Trustees or such other persons as identified by the Board pursuant to the appropriate resolution. Checks shall require multiple signatures or authorizations as follows:
  - a. Checks or electronic payments or transfers up to the amount of \$1,000 may be signed or authorized by the Treasurer.
  - b. Checks from \$1,001 to \$5,000 shall be signed by the Treasurer and the President of the Board of Trustees. Electronic payments or transfers shall first be authorized by the President of the Board of Trustees. Authorization shall be in writing either via regular U.S. Mail or by other electronic means, the record of which shall be maintained by the Treasurer.



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- c. Checks or electronic payments or transfers of \$5,001 and more shall first be approved by majority vote of the Board of Trustees and documented in records maintained by the Board Secretary. Checks of this amount must be co-signed by the Treasurer and the President of the Board. Treasurer shall notify, in writing either via regular U.S. Mail or by other electronic means, the Board President in advance of issuing any electronic payment or transfer authorized by the Board of Trustees the record of which shall be maintained by the Treasurer.
4. An appropriate Statement of Net Assets and Statement of Revenues and Expenses shall be maintained to create an orderly cash flow during the event prior and until the various expenditure requirements are satisfied. Monies excess to the needed balance should be invested. However, no investment shall be made which would place the principal amount at risk.
5. At the end of the event, and upon payment of all properly submitted invoices, the Treasurer shall issue to the President of the Board of Trustees, for distribution to the Board and Steering Committee members, a Balance Sheet and Income Statement reflecting current cash conditions and the results of the operation of the then completed event.
6. Prior to the first planning meeting, the Treasurer shall prepare a Budget for the ensuing year and present it to the President of the Board of Trustees and the incoming General Chair. This budget is prepared as a draft after reviewing the previous year's event and including any known changes that have been forecast. At the next Steering Committee planning meeting, the Budget is presented to allow the various leadership chairs to comment and if necessary, suggest amendments in an amount based upon their experience in their planning for the new year. The first revision is then presented by the Treasurer at the second Steering Committee planning meeting. After a final review at the second Steering Committee planning meeting, the budget will be presented to the Board of Trustees for adoption or final modification.

7. Upon receiving the monthly bank statement, the Treasurer matches the bank deposits with a report of the credit card processor for both the expense (discount) for using the credit facility.
8. At the AOP event, the Treasurer will collect all fees from late registrants.
9. The Treasurer is responsible for maintaining all financial records in accordance with federal, state and local laws and regulations. These records shall be made available to the Board of Trustees upon request and further shall be provided to the Governance Committee upon request. The Treasurer is also responsible for cooperating with the certified public accountants selected to assist in preparing the annual review and the Tri-Annual audit for AOP. All necessary records shall be supplied to the certified public accountant necessary to complete these financial statements.
10. The Treasurer shall provide a comparative budget of projected to actual revenue and expenses. These records shall be made available to the Board of Trustees upon request and further shall be provided to the Governance Committee upon request.
11. Seeks approval of Board of Trustees for any budget line item that is expected to exceed the line-item amount by 10% or more.
12. Utilizes secure methods of financial information and data transfer and storage.
13. The Treasurer shall be responsible for preparing the necessary Form 990 for AOP and making certain that the draft form 990 is distributed to all Board members prior to filing with the IRS and that the Form 990 is timely filed with the IRS.
14. The Treasurer shall purchase appropriate insurance including but not limited to event cancellation insurance, as directed by the Governance Committee.

## Aide/Coordinator Duties

**Reports to:** General Chair

**Interacts with and provides information to:** General Chair, DGEs, Hotel Liaison / Facilities Chair, Program Chair, Treasurer, AV Coordinator

**Hosts/ Interacts with:** Assigned VIP Guest or Speaker

**Objective/Purpose:** The role of the aide/coordinator is to assure that the Guests of All Ohio PETS who are considered VIPs are provided a memorable experience. The guests should be fully aware of their schedule, of opportunities to interact with attendees and DGEs, as well as meetings or events that they are expected to attend. Arranged transportation, arrival reception, accommodations, seating locations, and dining experiences is set for them prior, during, and upon departure from AOP. In essence, the aide/coordinator is that VIP's concierge, host, and at times, escort before arrival, during AOP, and for any needed follow up.

**Who are considered VIPs:** Most often, AOP VIPs will include the RI President and /or RIPE (Rotary International President-Elect), one or more Rotary International Directors, RI Officer, and select guest speakers or officials.

Duties will vary depending on the duration of the stay and the type of activities planned. The overall responsibility is to ensure that the guest is comfortable, arrives on time for all events, and enjoys the visit. The following guidelines should be followed by the aide/coordinator (s):

### **Before arrival**

1. The general chair will appoint an aide (one per VIP) to coordinate the VIP's visit shortly after the acceptance of the invitation from the General Chair or confirmation with the General Chair to participate in All-Ohio PETS. The aide/coordinator will send information to the guest giving details about





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himself/herself, such as email address, mailing address, telephone and name of spouse and photos, if possible.

2. **Master VIP Grid**

Each aide/coordinator will provide details regarding travel, arrival time, special requests, AV, food allergies to the General Chair on a regular basis. This information will be updated as needed to ensure that an easy to access form is created and distributed to DGEs and key committee chairs who need to have access to the information from pre-arrival to on site updates. This Master Grid is for reference and changed only by the General Chair albeit the information is provided by multiple steering committee members and the aide/coordinator.

3. **Travel Arrangements**

The aide/coordinator will work with the VIP on the timing of his or her travel arrangements, particularly regarding the best airport to use for the PETS meeting and about any pre-meeting or post-meeting activities the speaker is invited to attend. Inform the facilities chair of all travel arrangements.

4. **Confirmation and Reimbursement**

When the speaker purchases his or her airline tickets, the aide/coordinator should ask for a copy of the tickets to confirm the flights and charges and then submit a copy of the tickets to the PETS treasurer for reimbursement in advance of the PETS meeting.

5. **Speech Topic and Time**

The aide/coordinator will have received from the General Chair (on behalf of the DGEs) the program portion that he or she will be involved with as well as the requested topic, the amount of time allocated, and the date and time of the presentation. Be sure that the speaker is aware of his/her role at the event.

6. **A/V Equipment and Microphones**

The aide/coordinator should clarify the speaker's needs for A/V equipment and his or her preference for microphones and props. The information should be

communicated to the Rotarian in charge of AV at a meeting prior to the event. Any problems or deficiencies should be resolved well in advance of the meeting. AV needs should be set prior to the speaker's arrival.

7. **Hotel Arrangements**

The aide/coordinator should ensure that the facilities chair or other appropriate person has made a reservation for the speaker (and spouse, if appropriate) at the headquarters hotel. It is the responsibility of the aide to inquire about any special accommodation needs, dietary restrictions or allergies or preferences the speaker may have. Check the speaker into the hotel personally, if possible. 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 officer. Rotary International Officers and/or their representative should receive a suite if one is available at reasonable cost. RI representatives should not be in a room smaller than those of the PETS officers.

8. **Invitation to Spouse/Partner**

The aide/coordinator should advise the speaker that his or her spouse/partner is encouraged to attend the PETS event. Clarification regarding the expense should be made in advance by the PETS committee.

9. **Dress**

Inform the guest of any special dress obligations (formal wear, etc.) during the time of the visit; ask for any specific requests from officer.

10. **Program**

Send a program or confirm that event organizers have sent a complete program for the entire time of the visit to enable the speaker to tailor his or her schedule. DON'T wait until the final draft is ready to share the schedule of events with the speaker. Include information on all presentations or speeches the guest 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 districts.

**11. Maintain Communication**

The aide/coordinator should call or exchange e-mail messages with the speaker at least once a month to ask if he or she needs any assistance in preparation for the PETS meeting.

**12. Local Arrangements**

At least a full month before the PETS meeting, the aide/coordinator should provide the name and phone number for the hotel (AOP hotel) where the speaker will stay and the name and cell phone number for the Rotarian who will meet the speaker at the airport for the PETS meeting. Include the cell phone number of the speaker.

**13. Emergencies**

Have information on hand regarding medical help (hospital, doctor, dentist).

**14. Registration Materials**

If there are registration materials and/or badges for the event, the aide/coordinator will secure that material in advance and ensure names are spelled correctly and that all necessary material and information is included in the materials. The aide/coordinator will pre-register the speaker/guest and pick up all registration materials.

**During the Speaker or RI Officer's stay the aide/coordinator will:**

1. Meet the assigned guest at the airport (or other point of arrival). Be sure he/she is met upon arrival. If the speaker is arriving by car be sure a Rotarian is waiting in the hotel lobby.
2. Personally, take the speaker to the room and ask if the room is suitable.
3. Appropriate refreshments should be in the room.
4. Be sure the officer knows how to contact you at all times during his/her stay.
5. Be sure the officer knows the exact time he/she is to be picked up for any activity.
6. Escort the officer and his/her spouse to each activity and stay with them at the activity. If possible, know the seating arrangements in advance and have your seats as close to them as possible.
7. The aide/coordinator should take the speaker to the plenary hall at the first opportunity, preferably when the room is empty. The speaker may want to stand on stage to become acclimated to the room. The AV equipment, the microphones, and the props all need to be checked in advance. The Aide should keep the facilities chair and the Stage Manager apprised of every need for A/V.
8. 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 speaker.
9. Be attentive to any need of officer and spouse during the activity; be protective and helpful, but not overbearing or intrusive.
10. The aide/coordinator should ask the general chair and facility chair about seating arrangements at meals and advise the speaker about any special seating at meal functions.
11. 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.
12. Keep the event organizer(s) and facilities chair informed about any needs or desires of the officer.
13. Do not plan any activities other than those already planned by the coordinator of the event, unless specifically asked to do so by the officer.

14. Be ready for the unexpected; to the extent possible, anticipate situations.
15. Be prepared to carry out various "ad hoc" responsibilities.
16. The aide/coordinator should ask the speaker and the speaker's spouse/partner if either or both are interested in visiting any local tourist attractions and/or shopping centers as time permits. When possible plan to accommodate their wishes.
17. The aide/coordinator should confer with the general chairman and then advise the speaker if he/she is welcome to attend all or part of the breakout sessions during the PETS meeting.
18. The aide/coordinator should assist the speaker and his/her spouse/partner in attending any post-meeting events they wish to attend.

#### **Following the event**

1. The aide/coordinator should assist in checking out of the hotel and provide (or arrange) transportation back to the airport (or other point of departure) for the officer and spouse. If the speaker is traveling by car the aide/coordinator should aid with the speaker's departure from the parking garage.
2. If needed, the aide/coordinator will work with the Facilities Chair to ship large gifts or mementos to the officer.
3. The aide/coordinator should ensure that appropriate thank you messages to the speaker are sent within three or four days of departure and the speaker should be asked to submit comments and suggestions that he/she may have concerning the PETS meeting.
4. Any evaluations of the speaker may/ should be shared with the speaker in a tactful and helpful manner. This may be done by the General Chair if needed.