Manual for District Directors

American Welding Society

Revised 1/16/2020
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Revision Dates
9/12/2016
5/16/2018
1/16/2020 Update to Foundation/Scholarship information
Correct broken links and outdated contact information
District Director Qualifications and Duties

**Qualifications:** There shall be twenty-two District Directors, one from each of the Society’s domestic Districts. District Directors shall be duly nominated by their respective Districts for a term of three years. A District Director shall be eligible for re-election for one term (for a total of six consecutive years). A District Director shall not be eligible for a third term until at least three years have elapsed following the previous term of service. To be eligible for election as District Director, a candidate must have served as Chairman of a Section, as Chairman or Vice Chairman of a standing, technical or special committee of the Society, or as Director-at-Large.

**Duties:** The District Director shall participate in and promote the activities of the American Welding Society under the direction of the President and the Board of Directors. The District Director shall serve as a member of the Board of Directors.

General responsibilities of the District Director include the following:

1. Attend Board of Directors meetings as called in accordance with the provisions of the national bylaws.
2. Agree to serve on assigned committees as they relate to the Society’s planning and execution of vital matters.
3. Convene and conduct the annual District Conference
4. Report to AWS Staff, Board of Directors and Sections within the District actions on matters, as they occur.

Specifically, District Directors should:

1. Represent on the Board, the members, Sections and Student Chapters located within the District Boundaries established by Board action.
2. Participate in, and direct, overall planning of District Conferences in regards to time, place, date, agenda and cost of the event. Utilize staff to identify major strengths and weaknesses of each Section.
3. Assist in improving Section meeting programs in matters of topics selected and availability of speakers.
4. Provide direction and consultation of Section educational seminars with respect to topics, dates, and conflict with adjoining Sections and National events. Encourage Sections to maintain a variable program to cover as many subjects in the welding field as possible.
5. Promote membership in Sections and in the Society. Meet with each Section and Student Chapter a minimum of once per year. This function may be served by the Deputy District Director(s), whose purpose is to assist District Directors in visiting Sections, if needed, as well as to help with other District/Section business throughout the year.
6. Promote attendance at AWS national conventions, as they occur, through films or suitable media that have been provided by staff.
7. Serve as Chair of the District Executive Committee.
8. Appoint and Chair District Awards Committee within the District.
10. Assist in the organization of new Sections, Divisions and Student Chapters within the District.
11. Render an annual report covering the condition of each Section within the District, as well as own activities during the year. This report should include Section visits made by Deputy District Directors on behalf of the District Director.

**District Boundary Lines**

The District Director should become familiar with the boundary lines for all Sections in the District and submit any requests for changes to Districts Council. Boundaries must be established based on county lines. Boundaries are redefined after a new Section is chartered, a Section is disbanded, or whenever there is a good reason to redefine a Section’s boundaries for the benefit of AWS members. Before approval of a change is requested, the Executive Committee of the new Section or a Section initiating a request for a boundary change should consult with their District Director. The District Director will then assist in the consultations with the adjoining Sections and shall initiate action to rearrange the boundaries for affected Sections.

To facilitate assignment of new members, boundaries must be established by county lines. After agreement on the new boundaries is reached, AWS National HQ is notified with the request for approval to be placed on the next Districts Council meeting agenda. If changes in a District’s boundaries are involved, approval is also required by the effected District Director(s) and Section Officers.

No District shall be established or maintained with less than three active Sections.

**Section Communication**

The District Director can greatly assist the Sections within the District and maintain a closer relationship by issuing a monthly or quarterly newsletter to all Section Officers advising them of what each Section is accomplishing, reminders of their various duties, and what is happening in the Society nationally. Sample newsletter templates are available for your use in the Section Toolkit, under the District Director tab. In travels, the District Director should be alert to the opportunities for Society expansion and should immediately contact AWS HQ to request support when the activation of new Sections are promising.

If the District Director is affiliated with civic organizations, it is recommended that the Director inform these groups about the Society, thereby creating an interest in and desire for an AWS activity in their community. The Director should encourage Section Officers to appear before their local civic organizations to spread the word about AWS and its objectives.


Section Visits

When visiting Sections, the District Director should review the Section’s committee activities. These are the strength of Section organization and should not be overlooked.

By having a general knowledge of what each Section is doing, the District Director is in a position to better counsel all Sections in the District.

The District Director should make certain that all Sections keep him or her fully informed as to dates of their Executive Committee meetings so as to attend as many as possible. The District Director should keep a record of the number of Executive Committee meetings held in each Section and request copies of the Minutes from each meeting. The District Director should not wait on invitations to visit the Sections but should schedule to visit each Section at least once a year. If travels to Section cities do not coincide with the regular meeting date, the District Director should arrange a meeting of the Officers for the purpose of reviewing activities on a Section, District and National level.

Working with Student Chapters

Each year, the District Director should attempt to visit each of the Student Chapters within the District, communicate during the year with the Chapter Advisors, and invite them and the Chapter Officers to attend the District Conference.

Although there is generally a large turnover of Student Members, they should be viewed as possible long-term Members and the future of the Society. Active involvement in AWS during their educational years will remain with them, and they will likely return to AWS if their careers bring them into the welding industry.

Deputy District Directors

This position was established to assist District Directors in visiting Sections, if needed, as well as to help with other District/Section business throughout the year. The position also provides an opportunity for those interested in becoming District Directors to gain experience and learn what is involved. No financial reimbursement will be provided from National to this individual.

Deputy District Directors are appointed by the current District Director and are confirmed at the District Conference each year. More than one individual may be appointed, in any given year, by the District Director. The position is not mandatory but is simply an option that District Directors have. Deputy District Directors serve for a one-year term. Should your Deputy be attending Fabtech, you are encouraged to invite your Deputy to attend one or more Board meetings with you. This will allow your Deputy to have a first-hand understanding of Board week.
District Director Travel Reimbursement Fund

As approved at the fall, 2008 Board of Directors meeting, a District Director's Expense Fund was established to assist Directors in the cost associated with Section visits. Each District Director will have an annual budget, which runs from January 1 to December 31. The annual budget has been calculated from a total budget pool, as approved by the Board of Directors, with calculations based on the following:

- Each district's annual budget will be based on the higher of last year's actual spending, prior 5-year average, or $1,000
- Add total combined budget of all District Director’s travel expenses, which equals last year’s total spending
- Add everyone’s budget (which equals last year’s spending)
- The difference between $51,500 (the total budget + inflation) and the total of all the district's annual budget will create a pool
- The pool will be allocated based on an even growth percentage so that all districts can have headroom for incremental activities for the upcoming year.
- The total budget will increase by 3% or annual CPI, whichever is greater, this will offset inflation.
- AWS Staff will notify each Director, no later than the first week in February of their budget for that calendar year

As District Director, you will not have to file this as taxable income since AWS will be reimbursing you directly for your out of pocket expenses, nor will you be issued a 1099 form.

Directors will receive their annual budget no later than the beginning of February of each year, along with the current Expense Report Form. Directors should submit their expense reports, along with supporting receipts, to the individual indicated on the form. Because AWS will be the final reimburser, the IRS requires the Society to have the original receipts. Reimbursable expenses and requirements are listed on the Expense Report Form. A Cash Advance Request form may be requested in the event you will require a cash advance prior to your Section travel. To ensure that you receive the requested funds in time for your Section visit, please keep in mind that the Cash Advance Request form should be submitted to the AWS Accounts Payables Department at least three weeks prior to your scheduled travel.

Sections may also establish a local fund to help support the costs associated with District Director Section visits and related expenses. Sections may wish to contribute an annual amount, based upon total paid members in their Sections, such as $.50 or $1 per member. Or Sections may wish to pay the Director’s expenses to visit their Section, instead of contributing an amount based on membership. Local District Director Funds should be discussed at District Conference and are voluntary.

District Director expenses should be an agenda item at your District Conference to provide a detailed account of your expenses and revenues for the past year, especially if you have a local expense fund, funded by the Sections in your District.
District Conferences

Each year, the District Director convenes a meeting inviting all Section Officers in the District. District Conferences are scheduled during the months of April, May and June to allow Section Officers within the District to interact with each other, their District Director and a staff representative from National. Section representatives to the Conference participate in idea sharing and discussions on various Section activities and events and are also updated on National activities and programs.

Planning Your District Conference

Many Districts rotate the location so that each year the Conference is held in a different Section city, with the host Section making the arrangements for the meeting location and related activities. Districts may also hold the meeting in the same location every year when it is a convenient travel distance for all Sections. Section Officers will receive the date and location of the Conference from their District Director. Section involvement is very important, and every effort should be made to ensure that all Sections are represented.

Selecting the Conference Date and Location:

- Each year at your District Conference, it is a good idea to discuss and determine the Conference date and location for the following year. Record the date and location for next year’s meeting in the Conference Minutes for future reference. The AWS staff representative will also report the date and location selected to HQ.
- Usually, the Host Section is in charge of making the arrangements and responsible for the Conference expenses. District Directors should provide tips and guidance to the Host Section to aid them in planning the Conference:
  - **Hotel accommodations**: Secure a conservative room block for attendees to avoid attrition fees.
  - **The link**, [http://grouphotels.com/](http://grouphotels.com/) can be very helpful in finding affordable hotels for your District Conference. On this site, list the location, dates, number of rooms, the price bracket, and the conference room details you are looking for. Hotels then send you bids on what they have available that meets your criteria.
  - It’s important for the **hotel contract to always include an attrition clause** so that if some of the rooms in your block are not utilized, those rooms will be released back to the hotel by a certain date, and the host Section will not absorb the cost of the unused rooms. The same holds true when arranging breakfast, lunch and/or dinner for the group. Try to get a head count prior to making these arrangements to avoid too many guaranteed meals.
  - **Secure a complimentary meeting room**: If held in hotel, many hotels will provide a complimentary meeting room based on the hotel nights booked by your Conference attendees, or if the group lunch will be at the hotel. Conferences may also be held at a local school, company or
restaurant. Arrange for a meeting room large enough to comfortably seat all attendees.

- Exercise control of Conference expenses.
  - When arranging breakfast, lunch and/or dinner for the group, avoid a meal guarantee.
  - If a guarantee is necessary, make a conservative estimate to avoid paying for meals not needed.
  - Select a hotel that offers complimentary breakfast
  - Arrangements for the following need to be made and confirmed when applicable to your Conference:
    - water and coffee set-up in meeting room
    - pad and pen at each seat
    - Lunch for attendees (allocate no more than one hour)
    - Depending on the length of the Conference, consider arranging for morning and/or afternoon snacks
    - Dinner arrangements for Section Officers and family

- Special Touches (not required, but nice to offer)
  - Recommendations on activities or places of interest to visit for spouses and family during the meeting
  - Group activity planned the evening before and/or of the Conference
  - Arrange local plant tour if time permits.

Your Conference arrangements should be finalized by the end of March and the information sent to AWS HQ. As District Director, you also need to send notification with Conference particulars to Section Officers in your District at least six (6) weeks in advance of the meeting date.

A suggested Timeline and Checklist of Activities is located in Appendix A.

**District Conference Reimbursements**

AWS HQ recognizes the importance of District Conferences and provides several reimbursements to help offset the cost to Section Officers who attend. Information and explanation of reimbursement policies for District Conference travel and attendance, as well as Host Section reimbursement, may be found in the Section Toolkit. The direct link is [http://www.aws.org/library/doclib/district-conference-reimbursements.pdf](http://www.aws.org/library/doclib/district-conference-reimbursements.pdf).

Host Sections will be reimbursed up to the Board approved allotment, with receipts, for the Conference breakfast, lunch, snacks, and/or dinner for attendees, as well as the cost of the meeting room. This reimbursement also applies to the District Director, should he/she be the one to pick-up these expenses. Note that the total amount reimbursed will not exceed the Board approved allotment. The staff rep may offer, or be asked, to pick-up these expenses. It’s important to keep in mind that when the Staff Rep picks-up expenses that exceed the Board approved allotment, the host Section or DD will be billed the difference.
District Conference Agenda
As District Director, you will preside over the meeting, and will need to develop an Agenda. AWS will provide you with a sample Agenda for your use, or to use a guide in creating your own. A sample Agenda is provided in Appendix B.

The District Director should appoint one of the Section representatives present to act as Secretary and record all pertinent reports, discussions, actions, ideas, suggestions, etc. One option would be to select a Secretary from the Host Section. A copy of the Conference Minutes should be sent to the District Director for dissemination to all Sections, and to AWS National HQ.

Conference attendees will nominate and select recipients for the various National, District, Section and Student Chapter Member awards for that year. Also selected will be the District representatives who will attend the annual AWS Leadership Symposium and AWS Instructors Institute, held each summer at AWS HQ in Miami. Attendees will participate in the important task of selecting District Scholarship recipients from their areas, as well as a recipient for their District’s Educator Scholarship. Time should also be set aside for idea sharing and comparing notes on Section successes, failures and future plans. As District Director, you will be expected to give a report. The AWS staff representative will report on National programs and activities.

District Executive Committee
The bylaws of the Society require the organization of a District Executive Committee in each District. This Committee shall consist of the District Director as Chairman, and all Section Chairman, or their appointed alternates, within the District.

District Awards Subcommittee
Conference attendees will nominate and select recipients for the various National, District, Section and Student Chapter Member awards for that year. The District Director should appoint a District Awards Subcommittee consisting of the District Director or appointed alternate as Chairman, and all Section Chairmen or alternates, within the District. It is the responsibility of this subcommittee to recommend and select candidates to receive Section, District and/or National-level Awards.

Details on finding descriptions, criteria, and nomination forms for the awards selected at your annual District Conferences are located below.

- **Section, District, and National Awards Summary – Also available in Section Toolkit under the District Conference tab**
- **Howard E. Adkins Memorial Instructor Membership Award** ([http://www.aws.org/library/doclib/HowardAdkins-Instructor-awardForm.pdf](http://www.aws.org/library/doclib/HowardAdkins-Instructor-awardForm.pdf))
- **Private Sector Instructor Award** ([http://www.aws.org/library/doclib/PrivateSectorInstructor-awardForm.pdf](http://www.aws.org/library/doclib/PrivateSectorInstructor-awardForm.pdf))
- **Student Chapter Member Award** ([http://www.aws.org/library/doclib/Student-Chapter-Member-Award-Form.doc](http://www.aws.org/library/doclib/Student-Chapter-Member-Award-Form.doc))
Note: Complete nomination packages for National-level nominations for the above awards must be submitted to National for review and selection by the National Awards Committee.

Sample guidelines for nominating and selecting these awards is also located in the Section Toolkit, located at http://www.aws.org/library/doclib/AG.pdf. These guidelines were developed to aid in the selection process of Section, District and National-level award recipients. This approach has proven to be successful in streamlining the selection process at District Conferences.

**District Scholarship Selection**

Districts are allocated funding for District scholarships. Each year, Conference attendees participate in the important task of selecting the District Scholarship recipients from their areas.

The District Scholarship application and selection process is online. To access the scholarship application, please visit https://scholarship.aws.org. The Reviewer Portal is found at https://scholarship.aws.org/committee.

Many Districts appoint a District Scholarship Committee to review and select the recipients on behalf of the District. Other Districts discuss the applicants and make selections during the Conference.

**Educators Scholarship Selection**

Each District scholarship money to award to deserving instructors within their Districts at their District Conferences. Note the deadline for submitting applications is April 1. For more information and to access the application, visit www.aws.org/educatorscholarships.

**Instructors Institute**

The AWS Instructors Institute provides welding instructors an opportunity to enhance and strengthen their teaching skills and experience hands-on learning of new teaching techniques. Each year, a welding instructor is selected at each of the 22 District Conferences to attend the Institute, held at AWS HQ in Doral (Miami), Florida. Detailed information on this event is located in the http://www.aws.org/events/detail/instructors-institute. Sections wishing to nominate a candidate should forward the nomination form to their respective District Director prior to their District Conference.

**Leadership Symposium**

The first AWS Leadership Symposium took place in 1999 in hopes of building the Society’s future base of leaders. Since then, many who have participated in this annual event, have gone on to serve on the AWS Board of Directors. Each year, an individual is selected at each of the 22 District Conferences to attend the Symposium, held at AWS HQ in Miami (Doral), Florida. Please note that applicants are required to be AWS members in good standing and active in Section activities. Sections wishing to nominate a candidate should forward the nomination form to their respective District Director prior to their District Conference. For more information, please visit http://www.aws.org/events/detail/leadership-symposium.
**Welder Training Scholarships**

**Purpose:** The AWS Welder Training Scholarship is for students seeking welder training in a certificate program up to two years in length through a trade school, community college, or other facility providing welder training. The scholarship cannot be used towards a two- or four-year degree program.

**Application:** Applications are accepted January-November.

**Selection:** District Directors may make selections at their discretion or form a selection committee to review applications and make selections. Alternate recipients must be selected and provided to Foundation Staff, in addition to the recipients. District Directors should also provide Foundation staff a list of applicants that they know will not be selected in order to provide more prompt feedback to the applicant. Efforts should be made by the District Director to ensure that all recipient selections are fair and transparent.

Learn more and access the application at [http://www.aws.org/weldertrainingscholarship](http://www.aws.org/weldertrainingscholarship).

**Vacancy in the Office of District Director**

The Executive Committee of each District has the power to fill a vacancy in the office of District Director for an unexpired term whenever such vacancy occurs. In the case of death, absence or disability of the District Director, the AWS President may appoint a member of the District Executive Committee to convene the District Executive Committee for this or other purposes.

**District Director Elections**

District Director elections are conducted at the District Conference during the second year of the Director’s first term, and if re-elected, the second year of the second term.

Term of office is three years. A Director is eligible for re-election to a second three-year term, for a total of six consecutive years. An individual shall not be eligible for a third term until at least three years have elapsed following his or her term of service.

Please note that there will be an approximate 18-month period between being elected at the spring District Conference and taking office, giving the individual elected ample time to acquaint themselves with the Society and their responsibilities as a District Director. Revisions made to the Society’s Constitution and Bylaws in the fall of 2004 necessitated modifications to the timing of the elections. The Bylaws were further modified in the spring of 2014.

In January of each year in which an election will be held, AWS HQ will send those Directors information on forming a District Nominating Committee. A copy of this information will also be sent to Section leaders within these Districts. If a Director is eligible and plans to run for a second term, he/she should notify Section leaders within the District of their intent, and also
invite Section leaders who may be interested in running to submit their intent to the District Nominating Committee Chairman.

**District Nominating Committee**: Prior to the District Conference in the year in which there will be an election, a District Nominating Committee shall be appointed. Each Section’s leadership shall appoint a representative to serve on the Committee. The Section’s appointee shall be a member of the Section, preferably a current Officer. Two other members of the District, one of whom shall be the District Director and one of whom may be a former Chair of the District Nominating Committee, if available, shall also be appointed by the District Director. If a former Chair of this Committee is not available, the District Director may appoint to this Committee any individual from any of the Sections in his or her District who then currently serves, or in the past has served, as Chair of a Section. The current District Director shall designate the Chair of this Committee from among those members who represent Sections.

- **Sample notification to Section leaders to appoint a representative to serve on the District Nominating Committee**:

  *Your Section will need to appoint a representative (1) for the District Nominating Committee. After selection, please forward the name to _________________, as he/she will be serving as the chair of this committee. His/her email address is _________________. The Committee Chair will be following up with your representative upon notification.*

The District Nominating Committee shall select a qualified nominee for District Director of their District and report the name of the nominee they have selected to the AWS HQ following the District Conference. Qualifications and duties for the District Director's office are defined on page 3 of this Manual.

**Election Process**: Interested candidates should have already submitted their intent and biography to the Chairman of the District Nominating Committee. The election will be an item on the District Conference agenda, chaired by the Nominating Committee Chairman, with ample time allowed for the candidate(s) to address the attendees on why he/she would be qualified to serve the District and represent its Sections on the National Board of Directors. Following a question and answer period, the candidate(s) should be asked to leave the room for attendee discussion and vote by Nominating Committee members. **Note: There is to be one vote per Section.** The name of the elected Director should be reported to AWS National, along with the written acceptance, color photo and a brief biographical sketch.
Mentoring Your Successor

As outgoing Director of your District, it is most important that you assist and mentor your successor prior to their taking office, ensuring a seamless transition. Be a good mentor by:

- In the event the District Director-elect has not attended the AWS Leadership Symposium, he/she is entitled to do so, and should be encouraged to do so.
- In the interest of creating a smooth transition, invite and encourage your successor to attend at least half of the upcoming Section meetings so that introductions can be made and the transfer of background knowledge about any Section-specific issues can be discussed.
- The handoff of Section/District records and financials should be made in October or November. These should include District/Section scholarship information, past Section Annual Reports, past District Conference Minutes, pertinent Section-related or specific issues, if warranted, etc.
- The handoff of any District Director bank accounts should be transferred in December.
- Explain and answer any questions on related tasks.
- Be sure your successor attends your final District Conference.
  - Introduce them to Section leaders they may have not met.
  - Provide a schedule, timeline and tips you found useful to aid them in planning their future District Conferences and assure them that they may ask you any questions relating to District Conferences.
- Assure your successor you will be available anytime during the year should they have any questions.
- When attending their first Board of Directors meetings as observers prior to taking office, aid in their orientation of both the spring and fall Board weeks.
  - As your successor’s Out-going Mentor, attend all mentor training classes with your mentee at both the spring and fall Board meetings to help them better understand.
  - Let them know you’ll be happy to answer any questions they may have regarding Council and Board meetings, and decisions made.
- See Appendix E for a general check list of Board Week items to review with your successor.

District Director Annual Report

District Directors are required to submit an annual report covering the status of each Section within the District, as well as the District Director’s own activities during a calendar year. The Report form will be provided to Directors in November of said calendar year. Due date for this Report is January 15th immediately following the preceding year. This report should also include Section visits made by Deputy District Directors on behalf of the District Director, if applicable.
**District Director Awards**

The District Director Award provides a means for District Directors to recognize individuals and corporations who have contributed their time and effort to the affairs of their local Section and/or District. The award is a discretionary award, and Directors may recognize up to 15 individuals per year. The list of recipients will also be recognized in the *Welding Journal*.

Submit names of individuals to receive the award Section Services. Special award certificates, along with plaques for mounting, will be sent to you for signature and presentation.

**National Activity**

The District Director is the source of direct information for the National Society as to the needs and desires of members and Sections within the District. Being a member of the Board of Directors, Districts Council, an appointed or elected member of other Standing Committees and Councils, Chairman of the District’s Executive Committee and being active in these groups, gives the District Director the sense of Section, District and National thinking.
Section Annual Reports

The Society Bylaws require that each Section prepare and submit an Annual Report, covering the fiscal year June 1 to May 31. The report, consisting of two parts, should be received at National HQ by **July 1**. Part I of the Annual Report is sent to the Section Secretary the first week in April, and Part II, the financial report, is sent to the Section Treasurer the first week in May.

District Directors will receive a weekly log from AWS HQ during the month of June showing which Sections have and have not submitted Reports. It is the responsibility of each District Director to ensure the Sections within their Districts submit their Reports by the due date.

Sections will receive the following rebate, at the current Board approved allowances, for submitting their Annual Report on time:

- Anniversary payment
- Member rebate
- District Conference reimbursements

Rebates are mailed to Section Treasurers in September. Late filing penalty deductions range from 25% for Annual Reports received after July 1, to 75% for the Annual Reports received after September 15.

**Part I, the Secretary’s Report:** Section Secretaries will receive this report, both in electronic format and in hard copy, in April, for reporting Section Officers for the coming year, as well as other activities and pertinent data.

**Part II, the Treasurer’s Report:** Section Treasurers will receive the financial report form, Part II, in electronic format, in May. It is advised that this Report be completed electronically for accuracy, as numbers entered will automatically total, and the Treasurer will be able to immediately see if the report is correct or if there may be an error with one of the entries.

The financial report form contains two pages.

- The first page, Exhibit A, provides space to list all of the Section’s financial accounts
- The second page, Exhibit B, is the report form.
- Instructions for completion are located at the bottom of each page.
- The top of the Report will have already been completed by the AWS Accounting staff, according to the Report submitted by the Section the previous year.

**Important:** The monthly Reconciliation Form and copies of all 12 bank statement must be attached to the Report, or it will be returned to the Section.

**Monthly Reconciliation Form:** Effective with the 2016 reporting year, the Monthly Reconciliation form is a requirement. This form was created to assist Section’s with their financial reporting.
In an effort to improve communication between Sections and their District Directors, as well as provide accountability, Treasurers are required to send their Section’s monthly reconciliation form, along with a copy of the corresponding bank statement, to their District Director each month, within 2 weeks after receiving the bank statement. It is the District Director’s responsibility to encourage and support Sections in following through with this task.

- The direct link to the Monthly Reconciliation form and instructions is: Monthly Section Reconciliation Form and Instructions.

**Section Financial Guidelines:** A set of Financial Guidelines were created in 2015 to assist Sections with their financial affairs and reporting. It is important that Sections incorporate financial guidelines in their bylaws.

The Guidelines are basically the do’s and don’ts of financial management & cover:

- Conflict of Interest
- Acceptable Payment Methods
- Supporting Documents that are required to accompany the Section’s Annual Financial Report

A suggested set of Guidelines have been included in the ‘Suggested Section Bylaws’ as a separate Article on Financial Policy and have also been added to the ‘Duties and Responsibilities of Section Officers & Committee Chairs,’ located on page 8. The direct link is [http://www.aws.org/library/doclib/Suggested-Duties-and-Responsibilities-for-Section-Officers-and-Committee-Chairs.pdf](http://www.aws.org/library/doclib/Suggested-Duties-and-Responsibilities-for-Section-Officers-and-Committee-Chairs.pdf). The duties and responsibilities for Section Treasurers begin on page 16.
Section Newsletters & Meeting Notices

AWS HQ provides the service of sending Section meeting notices and newsletters electronically to Section membership. All a Section needs to do is provide the Section Web Editor with the information and AWS will do the rest. Please be aware that when sending any information to Section membership, the use of this tool is limited exclusively to promoting AWS Section meetings and activities.

- Sections may include job openings within their meeting notices/newsletters, as a service to their members.
- Sections may include material from their Corporate sponsors within their meeting notices/newsletters. Many Sections offer different levels of Corporate sponsorship, providing a fundraising avenue for the Section’s scholarship fund, one of which is advertising in the Section’s meeting notice/newsletter.
- Advertising a private business event, whether for a corporate sponsor or not, should be limited to the Section’s meeting notice/newsletter. In other words, Sections may not send out a separate flyer promoting a local business event.
Hosting the AWS President/Executive Director

No later than February in the year of the proposed request date, the Section, or District Director, must submit a written request to AWS National HQ, to the attention of Chelsea Steel (csteel@aws.org), with the following required information:

- Provide the name and contact information of the contact person responsible for the presidential or Executive Director Visit
- General description of the proposed visit
- Desired dates
- Provide tentative day by day schedule

1. Upon receipt, AWS Staff will check for schedule availability.
2. If there is schedule availability AWS Staff will inform the President or Executive Director of the requested travel dates.
3. Upon confirming availability for the event, the AWS President/Executive Director will arrange travel with the contact person(s) responsible for the request.
4. It is customary that the contact person, or individual assigned by the contact person, be responsible for arranging transportation during the visit. Should this not be possible, be sure the President/Executive Director is aware that they will need to rent a car. The Section/District Director is not responsible to cover car rental costs.
5. The Section/District Director is not responsible to cover hotel costs for the President/Executive Director.
6. For District-wide visits, please list each event and provide a daily schedule. If possible, try to combine several Section meetings in one central location.
7. Hosting Tips:
   - Arrange tour of a local company
   - Arrange visit to local school(s) to meet with welding students
   - Extend invitation to have dinner with you and your spouse, and/or several Section Officers
   - Should the President be visiting your area for several days, recruit local Section Officers to accompany President on company tours/school visits
   - Invite to be guest speaker at Section meeting (preceded or followed by group dinner)
   - Present both the President and his/her spouse with a gift indicative of your local area, and keep in mind to make it a gift they can take back on the plane with them
8. Take photo(s) of the visit(s) and at Section meeting(s) and submit to the Welding Journal for publication.
District Director Month-by-Month Activity Schedule

In 2016, the AWS Board-appointed Working Group on Mentor Training developed a month-by-month activity schedule to serve as a guide for District Directors during their term in office. A guide for mentoring incoming Directors is also provided. The suggested Schedule is located at http://www.aws.org/library/doclib/AWS-DD-Schedule.xlsx.

District Directors who are elected to serve on the AWS Membership Committee for a one-year term

District Directors elected to serve on the AWS Membership Committee for a one-year term may request travel reimbursement if the Membership Committee meeting is held outside of their District.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>SUGGESTED DATE</th>
<th>ACTUAL DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify Section Services of meeting date, location and place.</td>
<td>Mid-January</td>
<td></td>
</tr>
<tr>
<td>Make FINAL arrangements for meeting date and city. (Notify all Section Chairmen and Secretaries in your District).</td>
<td>Mid-February</td>
<td></td>
</tr>
<tr>
<td><em>Note: groups.hotels.com can be a helpful resource in locating affordable hotel accommodations.</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If working through a Host Section, advise them to request a complimentary meeting room. Exercise control of conference costs, <em>i.e.</em>, food, tax, gratuity and meeting room. AVOID meal guarantee. If guarantee is necessary, make a conservative estimate.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In notices to all Section Officers, urge them to attend and inform them of Section Attendee Reimbursement to be included on the Section’s September annual rebate. In addition, inform Section Officers of the mileage reimbursement policy whereby up to two Reps per Section will be reimbursed for travel at the current IRS mileage rate or airfare, whichever is less. See District Conference Reimbursement Policies, located in the Section Toolkit at <a href="http://www.aws.org/library/doclib/district-conference-reimbursements.pdf">http://www.aws.org/library/doclib/district-conference-reimbursements.pdf</a>.</td>
<td>First week in March</td>
<td></td>
</tr>
<tr>
<td>Develop Agenda (sample Agenda supplied by AWS HQ).</td>
<td>Mid March</td>
<td></td>
</tr>
<tr>
<td>Send reminder to Section Officers and include Agenda.</td>
<td>End of March</td>
<td></td>
</tr>
<tr>
<td>Check with each Section for reservations.</td>
<td>One month prior &amp; again 3 days before Conference</td>
<td></td>
</tr>
<tr>
<td>Verify all arrangements and costs for meeting. Set conservative number to attend meal(s), should a guaranteed number be required. Determine who will settle account for charges on the day of meeting.</td>
<td>2 weeks prior and, again, 2 days before Conference</td>
<td></td>
</tr>
<tr>
<td><em>Note: Following the Conference, and once charges have been compiled and receipts have been submitted to National, the Host Section will receive reimbursement based on receipts. See Host Section Reimbursement Policy at <a href="http://www.aws.org/library/doclib/district-conference-reimbursements.pdf">http://www.aws.org/library/doclib/district-conference-reimbursements.pdf</a>. If expenses are paid by the host Section or District Director, a receipt(s) must be submitted to Section Services for reimbursement.</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check again on meeting room and all arrangements for the Conference.</td>
<td>1 week prior and, again 1 day before Conference</td>
<td></td>
</tr>
<tr>
<td>Speak with Staff Representative prior to Conference to review Agenda.</td>
<td>1 week before Conference</td>
<td></td>
</tr>
</tbody>
</table>

- For more information, see Selecting the Conference Date and Location on page 8
20__ AWS District Conference
Sample Agenda

1. **Call to Order**
   District Director

2. **Appointment of Secretary**
   (suggestion: Representative from Host Section)
   District Director

3. **Welcome and Introductions**
   District Director

4. **Additions to the Agenda**
   District Director

5. **District Director’s Report (District Business)**
   District Director

6. **Staff Report on National Activities**
   AWS Staff Representative

7. **Section Idea Sharing/Success Stories**
   All
   A. Programs
   B. Speakers
   C. Educational Courses
   D. Attendance
   E. Recruiting
   F. Publicity
   G. Goals
   H. Website

8. **District Representative Nomination for the**
   District Director
   **20xx AWS Leadership Symposium**

9. **District Representative Nomination for the**
   District Director
   **20xx AWS Instructors Institute**

10. **Section/District/National Award Nominations**
    District Director/
    District Awards Committee

   10.1 Meritorious Award (Section/District)

   10.2 Dalton E. Hamilton Memorial CWI of the Year Award (Section/District/National)

   10.3 Howard E. Adkins Memorial Instructor Membership Award (Section/District/National)

   10.4 Private Sector Instructor Award (Section/District/National)

   10.5 Distinguished Welder Award (National level only)

   10.6 Student Chapter Member Award

11. **Scholarship Nominations**
    District Director/
    District Scholarship Committee

   11.1 District Scholarships

   11.2 Educator Scholarship
12. **District Director Election** (if applicable)  
District Director/
District Nominating Committee

13. **New Business**  
District Director

13.1

13.2

13.3

14. **Next Meeting**  
District Director
Confirm date and location for next year’s Conference

*Note: dates for the spring XXXX Board of Directors Meeting have been scheduled for May XX – XX, 20__*

15. **Adjournment**  
District Director

*Please bring copies of all promotional pieces used during the year that you want to share with others in attendance (monthly bulletins, newsletters, membership campaigns, student night, etc.)
Discharge of Outgoing Officers, Installation of New Officers

I would ask that the Outgoing Officers please come forward at this time.

(Allow them to assemble in front of the group.)

It takes a lot of personal time and effort to perform the various duties and tasks associated with conducting the affairs of a local AWS Section, and the Officers and Staff of the American Welding Society appreciate your giving of this time and effort; otherwise, there would not be a __________ Section of AWS. I especially want to recognize the Outgoing Chairman, __________, who has led this Section during the past year. I now declare you to be relieved of the duties of your offices for the 20___ - 20___ year, and on behalf of the American Welding Society, and especially the __________ Section, I want to thank you for the work and leadership you gave during the past year in conducting the affairs of this Section.

(Shake hands with each.) (Applause)

I would now ask that the newly elected and appointed officers please come forward at this time.

(Allow time for them to assemble in front of group.)

Each of you has been duly elected or appointed to a position of leadership and trust in the __________ Section of the American Welding Society. The local membership will be looking to you to lead the Section forward during the coming year, and the National Officers and Staff of AWS will be looking for your support and cooperation as well.

Do you accept the position to which you have been elected or appointed? If so, then answer “I accept my position”.

Do you intend to fulfill the duties of the position to which you have been elected or appointed to the best of your ability? If so, then answer “I do so intend”.

I now declare you duly installed officers of the __________ Section for the 20___ -20___ year. Congratulations!

(Shake hands with each.) (Applause)
Installation of Officers of a New Section

At this time, I would request the officers for the 20___ - 20___ year to come forward and face the audience.

(Allow time for the group to assemble.)

You have been formally elected as the new officers of the __________ Section. This is both an honor and a challenge. It is an honor in that the members have expressed their confidence in your ability and desire to serve as officers of this Section. It is a challenge in that you will now have the responsibility for what may be the most demanding task of your career to date.

Entrusted to you now are duties and responsibilities that must be energetically and creatively performed if this Section is to live up to its traditions, maintain its high standards of performance, and further improve its favorable reputation in the local welding community and the American Welding Society. Like every Section in AWS, you will be faced with such problem as making ever dollar count, presenting interesting programs, maintaining communications, building the membership, and handling numerous administrative details. But I can also promise you personal growth as you meet and handle these challenges. You will find that the experience gained here will improve your ability to plan, organize, and control in your daily work, especially your ability to motivate and communicate with people.

And now, speaking to you as a team, having been elected to your positions of leadership, do you each agree to devote the time and energy to faithfully serve the __________ Section, to uphold its constitution and bylaws, and to aid fellow officers in achieving the Section objectives? If so, answer “We do agree.”

(Addressing Section members in audience.)

These leaders have expressed their willingness to serve you energetically and willingly as your Section officers. As AWS members, are you willing to follow these leaders to help them continue the traditions on which this Section was founded, to render loyal service to those you have elected, and to mutually work toward constant improvement and development? If so, will you indicate such willingness by standing and giving these officers a round of applause?

I now declare these leaders duly installed as officers of the __________ Section of the American Welding Society. Congratulations!

(Shake hands with each as they return to their places)

(Applause)
District Director Mentor/Mentee Check List for Board of Directors Meetings

This document is to give a better understanding of what is to be expected at both the spring and fall meetings. As a member of the Board of Directors (BOD) you are expected to attend and be involved in all meetings.

Board Week

- **Spring meeting**
  Spring meeting is held in Miami at AWS headquarters. This meeting is usually Saturday (arrive) to Wednesday (depart). Attire is more casual than the fall meeting where business casual is suggested.

- **Fall meeting**
  Fall meeting is held wherever Fabtech is held (Las Vegas, Chicago, and Atlanta) with every other year in Chicago. This meeting is usually Saturday (arrive) to Friday (depart). Attire is more formal (suit and tie), with a dark suit required for BOD photo.

- **Upon check-in, you will be provided with a laminated, wallet-size schedule for the week.** The schedule lets you know where you need to be, and at what time.

Explain what to expect when attending meetings:

- Meetings begin the following day with Districts Council at 8:00 am (you are a member)
- Consent Agenda Documentation: OCS Link (Found in BD/05. Board Management Manuals/Consent Agenda Documentation), [http://c.aws.org/WTSUNW](http://c.aws.org/WTSUNW)
- Executive Session

- **Attire (fall meeting):**
  - coat and tie/business attire for women whenever you are on the show floor or attending meetings – (AWS Ambassadors)

- **Receptions in the President’s Suite**
  - These receptions are more casual, be comfortable & meet everyone in a relaxed atmosphere
  - Usually four (4) receptions are held in the evening (spouses welcome)

- **Points of Interest during fall meeting:**
  - Excellence in Welding Awards Luncheon
  - Finance 102 (Incoming and new Board Members)
  - Officers Reception
  - Incoming Board of Directors photo (suit & tie required - dark suit preferred)
  - Officer’s reception (cocktail attire for women)
  - Governance/Strategic Planning (Incoming and new Board Members)
  - National Awards Luncheon/Foundation Luncheon
  - National Nominating Committee Meeting – to gain a feel of how the nominating process works
  - Section Appreciation/Member Milestone Luncheon
Informational link:

- **PowerPoint- Incoming Training**: OCS Link, [http://c.aws.org/FFHUBG](http://c.aws.org/FFHUBG)

- Provide an overview of your experience as an incoming DD
- Assure your mentee that he/she can feel free to contact you at any time should they have any questions
Five Types of Scholarships

- **District Scholarships** – for Trade/Technical schools, Community Colleges, and Universities
  - Apply via the online portal at [https://scholarship.aws.org](https://scholarship.aws.org)
  - Deadline 3/1

- **Welder Training Scholarships** – for certificate programs up to two years in length at Trade/Technical schools, Community Colleges, and other welder training facilities
  - Apply via the online portal at [https://scholarship.aws.org](https://scholarship.aws.org)
  - Available year round and selected on a rolling basis

- **National Scholarships**
  - Apply via the online portal at [https://scholarship.aws.org](https://scholarship.aws.org)
  - Deadline 3/1
  - Most scholarships are for bachelor’s degrees, with some for Associate degrees or certificates

- **District Named and Section Named Scholarships** – funded by individual Districts, Sections, or Donors.
  - Apply via the online portal at [https://scholarship.aws.org](https://scholarship.aws.org)
  - Visit the District or Section website for more information and specific criteria. Criteria, deadline, what it covers, vary by District/Section.

- **National and District Educator Scholarships** – Learn more and apply online at [www.aws.org/educatorscholarships](http://www.aws.org/educatorscholarships).
  - Deadline 4/1
  - For continuing education or professional development courses
  - For National Educator Scholarships there is a preference for a degree program - Associates, Bachelors, Masters or Doctorate
All speakers/presenters should be sensitive to diversity within the AWS community with regards to gender, race, religion, age, ancestry, sexual orientation, national origin, and issues of ableism.

The following guidelines serve as a supplement to any formal or informal policies that an AWS entity (department, committee, task group, Section, event, etc.) may use in conducting their business and are provided from a diversity and inclusion standpoint.

- **Language** – Use inclusive language that demonstrates respect for all people and cultures. Be sensitive to your audience in your choice of words and use of anecdotes. Always keep in mind that yesterday’s joke may be today’s blunder. Use non-sexist language throughout your presentation and avoid gender-biased comments (e.g., assuming all secretaries are female, all welders are male, etc.). In addition, gender neutral terms should be used, such as “Chair” instead of “Chairman”.

- **Presentations** – Avoid visual aids that show people in stereotypical roles. Actively seek out images of people from diverse ethnic groups. Refrain from making assumptions about those in the group other than a common interest in the content.

- **Name Pronunciation** – Ensure proper name pronunciation for individuals you may need to announce at the event. The AWS staff member or volunteer coordinating the event (if applicable) can assist in providing the phonetic spelling and proper pronunciation of names that will be announced.

**Additional information** - Key terms and other tips on appropriate language (Winning Words and Negative Words).

- **Diversity**: The word “diversity” can mean different things to different people. It is a concept that goes far beyond just individual differences like race, ethnicity and gender. We’ve defined it broadly to encompass acceptance and respect for all people, understanding and recognizing we’re all unique, and exploring our differences in a safe, positive and nurturing environment.

- **Inclusion**: “Inclusion” refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”

- **Winning Words**: The key words and phrases on the following page underpin an effective narrative for describing diversity and inclusion in a meaningful, inspiring way.
## WINNING WORDS

<table>
<thead>
<tr>
<th>WINNING WORD</th>
<th>BENEFIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Good</td>
<td>It is important for everyone to be able to see themselves as part of this effort. The “common good” is a universal value that everyone can connect to.</td>
</tr>
<tr>
<td>Diversity and Inclusion</td>
<td>Diversity and Inclusion (D &amp; I) is what we are striving to advance. Greater diversity and inclusion will strengthen and increase our impact in our organization.</td>
</tr>
<tr>
<td>Greater Impact</td>
<td>While many may appreciate the moral values behind D &amp; I, they want to know that advancing D &amp; I in their organization will help them better achieve their mission.</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Emphasizing the “variety of perspectives” brought to the table can help people intuitively understand how increasing D &amp; I can improve effectiveness.</td>
</tr>
<tr>
<td>New Voices and Expertise</td>
<td>Highlighting the tangible benefits of having diverse people at the table motivates people to support action to advance diversity—because they can more easily picture how it will strengthen their organization.</td>
</tr>
</tbody>
</table>

## NEGATIVE WORDS

<table>
<thead>
<tr>
<th>NEGATIVE WORD</th>
<th>DISADVANTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Girls</td>
<td>Groups of women should not be referred to as girls because it is belittling and offensive.</td>
</tr>
<tr>
<td>“Hey Guys”</td>
<td>Chose a gender neutral alternative for example “Hi everyone”.</td>
</tr>
<tr>
<td>Sweetie, Honey or Dear</td>
<td>It is non-professional and sexist language.</td>
</tr>
<tr>
<td>The Common Man</td>
<td>The average person/ordinary people/people in general.</td>
</tr>
<tr>
<td>A Chinese Professor</td>
<td>Instead use “a Professor”. Avoid using irrelevant, gratuitous ethnic descriptions.</td>
</tr>
<tr>
<td>The Disabled</td>
<td>Say a person or people “with disabilities.” Put the person first. A disability is what someone has, not what someone is. For instance, “mentally ill” is less respectful than “person with mental-health issues.” “Retarded” is never an appropriate term. Say “intellectual disabilities” or “cognitive disabilities.”</td>
</tr>
</tbody>
</table>