



D9815 Policy Registry Continuation Briefing

Authorisation

Authorisation: District Governor Name:	[Insert Name]
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Next scheduled review	At least every two years; earlier on material change.

1. What this briefing is

This document is a continuation briefing for the next Claude chat session working with Barry Rogers, Governance Chair of Rotary District 9815. It exists so that the next session can pick up the work without having to re-read the entire conversation history of the sessions that preceded it.

The work is the construction of a District-wide Document Registry and the policy and procedure that govern how it is maintained. This briefing carries forward the state recorded in v1.0 (25 May 2026) and adds the work done in a brief follow-up session on 26 May.

Version 1.1 — what is new

- An audit of the Forthcoming list against the orphaned Section 8.3 plan from the 15 May Respectful Rotary briefing. Two documents identified as missing from Forthcoming; one decision pending on whether “Personal Information Management” is a real document or is covered by the existing Privacy Policy.
- Recognition that several items from the 15 May Section 8 plan were never picked up (8.2 cross-reference cleanup; 8.5 and 8.6 Risk Register reviewer flags; 8.7 Compliance Checklist decision). Recorded here as deferred-and-tracked so they do not slip again.
- A plan for the next session: a comprehensive review of every document in the suite (~24 documents) against the manifest, with Barry uploading each as he locates it.

Version 1.0 — carried forward

All four documents from the v1.0 session remain at their end-of-session versions (no changes on 26 May beyond the audit work). The architecture, Committee composition, role-emails, and decisions list carry forward unchanged. The substantive content of v1.0 is preserved below.

2. Deliverables — current versions

Four documents are the working products of the system. All at the versions reached at the end of the 25 May session:

Document	Current version
D9815 Document Registry	v3.3 — the canonical inventory; 24 current documents, 5 forthcoming, 3 retired
D9815 Policy: Policy Lifecycle and Approval	v1.7 Draft — the principles by which the District makes, amends, approves, publishes, reviews, and retires documents
D9815 Procedure: Policy Lifecycle	v1.7 Draft — the operational steps; 8 pages
registry.json	v3.3 manifest — the single source of truth driving the Registry rebuild

All four are filed under the SharePoint-native filename convention adopted at v3.0: no date prefix, no version suffix. Version stamps live in the document footer (where they survive download and print) and in SharePoint version history (which is the working version manager).

3. The architecture, in one page

The system has three layers, separated by purpose.

Layer 1 — The manifest (registry.json)

A JSON file holding every document's metadata: title, suite, tier, version, status, filename, owner, authors, contact email, next-review date, the full version history. The manifest is the single source of truth. Any change to the Registry begins with an edit to this file.

Layer 2 — The build pipeline

Two Python scripts process the manifest and emit Word documents: build_registry.py produces the Registry .docx; build_lifecycle.py produces the Policy and Procedure .docx. A third script, apply_styles_patch.py, defines the Word paragraph styles (BodyText, ItalicDescription, ListBullet, ListNumber, plus Heading 1–6) that every emitted document inherits.

Layer 3 — The output documents

Word .docx files with the Rotary Royal Blue palette (#17458F for the section spine and table headers; Rotary Gold tinted to #FACB76 for the in-table ribbon rows), Aptos Display 11pt body text with 140/140 spacing, and clean filenames. Documents are published as PDFs (rendered by the Governance Chair from the signed .docx) and handed to the Webmaster for website upload.

4. Suite architecture — four siblings, not an umbrella

The District's documents sit under four sibling suites, not under a Respectful Rotary umbrella. An earlier proposal (15 May 2026, Respectful Rotary Suite Continuation Briefing 7) put CSW under an RR umbrella as a subset; that architecture was reverted by 21 May 2026 and the four-sibling model has held since. The Teams structure codifies the sibling model:

- Child Safety and Wellbeing (CSW prefix) — the original suite. Mandated by Victorian law (Child Wellbeing and Safety Act 2005, Child Safe Standards) and by Rotary International. Eleven documents at last count.
- Respectful Rotary (RR prefix) — Member Conduct, Code of Conduct, Bullying and Harassment Procedure, DEI Terms PLG. Four documents.
- District-wide (D9815 prefix) — cross-suite policies: DEI Policy, Privacy Policy, Complaints Procedure, lifecycle documents, the Document Registry itself.
- Program Level — program-specific documents: YLA, future RYLA/RYPEN/MUNA work. Currently minimal.

Retired documents sit in a fifth Teams channel ("Retired") and in a Retired section of the Registry. Three documents currently retired.

5. Where things live

Storage layer	What lives there
Microsoft Teams — D9815 Governance Team	All working .docx files. Channels-as-folders: Child Safety and Wellbeing, Respectful Rotary, District-wide, Program Level, Retired, with the Registry + manifest + build scripts at the Team root. Visible only to Team members.

SharePoint (underlying Teams storage)	Manages working version history of every .docx. Major/minor versioning, check-in/check-out. The working file always carries the clean filename; SharePoint tracks the versions separately.
District website (ClubRunner)	The published PDFs, plus inline-rendered plain language guides on hub pages. The District Webmaster (David Button) operates the upload.
The Policy and Procedures Hub	The public-facing landing page on the District website where readers find the suite. Renamed from the legacy Forms Hub. Pending rebuild as a separate evening of work.

6. The Governance and Policy Making Committee

The standing body through which the lifecycle runs. Members:

- Barry Rogers — Governance Chair, chairs the Committee. governance@rotary9815.org.au.
- Chris Drenen — Legal. Standing reviewer for every substantive change, cross-cutting. legal@rotary9815.org.au.
- Ken Mirams — District Youth Protection Officer (DYPO). Domain-specific reviewer for child safety documents. protection@rotary9815.org.au.
- Reg Ellery — District DEI Advisor. Domain-specific reviewer for Respectful Rotary and DEI documents. dei@rotary9815.org.au.
- David Button — Webmaster and District Communications Chair. Cross-cutting reviewer; operates the publication handoff at Step 6. david.button@rotary9815.org.au.
- Phil Thurgood — District Insurance Officer (DIO). Domain-specific reviewer for insurance/risk/financial documents. insurance1@rotary9815.org.au.
- PDG Mark Humphries — governance and policy-making expertise; cross-cutting reviewer.
- Daryl Moran — District Youth Chair. Functionally a domain consultee for District Youth Programs (RYLA, RYPEN, MUNA, Interact, Earlyact); treated as a full member for procedural simplicity. youth@rotary9815.org.au (pending confirmation).
- DG and DGE — ex officio.

Cross-cutting reviewers (Legal, Webmaster/Comms, PDG-member) see every substantive document. Domain-specific reviewers (DYPO, DEI Advisor, Youth Chair, DIO) see documents that touch their area.

7. Key decisions taken across this work

- Sole-authorship on three documents: the DEI Policy v1.1, the Lifecycle Policy v1.7 Draft, and the Lifecycle Procedure v1.7 Draft. Other 23 documents retain existing co-author attributions until next bumped.
- Sole-authorship on the Registry itself (v3.2 onward). Override of the earlier “leave everything else as it stands” decision, on the grounds that the Governance Chair maintains the Registry.
- District role email addresses only — never personal addresses — in every District document. Operational rule baked into the Lifecycle Procedure’s Step 3 (Drafting) and Step 6 (Publication-time verification). Email sweep applied: [child.protection@](mailto:child.protection@rotary9815.org.au) → [protection@](mailto:protection@rotary9815.org.au); [reg.ellery@](mailto:reg.ellery@rotary9815.org.au) → [dei@](mailto:dei@rotary9815.org.au).
- Filename convention changed at v3.0: date prefix and version suffix stripped from .docx filenames; SharePoint manages working version history; document footers carry the published version. All 17 active documents renamed in the manifest; 3 retired entries kept their historical filenames as audit record.

- PDF workflow: the Governance Chair produces the publication PDF from the signed .docx, then hands it to the Webmaster. For fillable forms (typically consent forms), form fields are added to the PDF as a post-processing step using Adobe Acrobat or equivalent.
- Style architecture refactor at v3.0: BodyText, ItalicDescription, ListBullet, ListNumber added as proper Word paragraph styles. Bullets and numbered lists now use 1cm indent + 1cm tab. Formatting lives in the style sheet, not as inline run properties.
- Cross-cutting reviewers: at v1.5/1.6 the PDG-member joined Legal and Webmaster/Comms in the cross-cutting category, meaning three of nine Committee members provide review on every substantive document.
- Four-layer Rotary hierarchy named explicitly in the Lifecycle Policy: Rotary International → Zone 8 (Rotary South Pacific) → Rotary Australia → District 9815. Zone 8 treated implicitly under Rotary Australia. The Rotary Club and DIO Handbook is correctly attributed to Rotary Australia.
- Build pipeline hardening at v3.3: all twelve literal-string template substitutions in build_registry.py and build_lifecycle.py converted to regex-based substitutions that ignore <w:t>'s xml:space attribute. Eliminates the silent-fail class of bug that bit at v1.6 (lifecycle Authorisation block) and v3.2 (Registry Authorisation block).
- Suite architecture (carried over): four sibling suites — CSW, RR, District-wide, Program Level — with Retired as a fifth Teams channel. The 15 May 2026 “RR umbrella with CSW as subset” architecture was reverted by 21 May and has not been revisited.

8. The 26 May audit — Forthcoming list against the 15 May Section 8.3 plan

The 15 May Respectful Rotary briefing (v7.0.1) flagged six new documents to build under what was then a planned RR umbrella rebuild pass (its Section 8.3). The rebuild pass was never carried out (the umbrella architecture itself was reverted), but the new documents listed in 8.3 are architecture-neutral and remain candidates for authoring. The 26 May audit compared those six items against the current Forthcoming list.

Items already on the Forthcoming list

- D9815 Child Safety and Wellbeing Infographic (general).
- Parent or Guardian Consent — Video Conferencing and Recording.
- Parent or Guardian Consent — Use of Images and Stories.

Items missing from Forthcoming — to be added

- Respectful Rotary — Bullying and Harassment Plain Language Guide. Companion PLG to the existing RR Bullying and Harassment Procedure.
- Respectful Rotary Infographic. Companion visual to the RR suite, parallel to the CSW Infographic.

Item pending decision

Personal Information Management — the 15 May plan listed this as a new document. It is unclear whether this is a distinct policy still to be authored (covering consents for photos, contact details, etc.) or whether it is covered by the existing Privacy Policy v1.3 Draft. Decision needed before this item is either added to Forthcoming or dropped.

Items dropped as obsolete

- RR-umbrella Privacy Policy and RR-umbrella Complaints — these were the 15 May framing of bringing Privacy and Complaints under the (since-reverted) RR umbrella. Both documents exist as District-wide policies (Privacy Policy v1.3 Draft; Complaints Procedure v3.5).

9. Open items for the next session

Items deliberately parked or pending external input, in three buckets:

9.1 Carried forward from v1.0

- Quorum and decision rules for the Governance Committee. The Procedure says drafts are tabled at the Committee but does not define what makes a valid Committee discussion or how substantive disagreement is resolved. Deliberately left for the Committee itself to settle.
- Tabling the Lifecycle Policy and Procedure at the Governance Committee — the process the documents describe. Once Mark, Chris, Reg, Ken, David, Daryl, Phil have all seen v1.7 and contributed substantive edits, the documents move toward v2.0 and DG approval.
- Renaming the actual .docx files in SharePoint/Teams to match the cleaned manifest filenames. The Governance Chair must do this manually.
- Email and co-author sweep on the existing 23 documents (those carrying child.protection@ in their own footers/Authorisation blocks). Will happen as each document is next bumped through its lifecycle, not as a forced sweep.
- Confirmation that Daryl Moran is using youth@rotary9815.org.au. Currently pending.
- Quick View link behaviour decision. A mock-up was produced showing three options for how documents in Section 2 Quick View should be hyperlinked. Decision pending. Mock-up: Quick View Link Behaviour Mock-up.docx.
- Policy and Procedures Hub page rebuild. Currently lives at <https://rotary9815.org.au/page/forms-hub/> as a stale Forms Hub. Needs rebuilding to mirror the Registry's suite/tier structure, replace personal email addresses with role addresses, and add links to the current published versions. Separate evening's work.

9.2 Added in v1.1 from the 26 May audit

- Add the two missing items to the Forthcoming list — RR Bullying and Harassment Plain Language Guide; RR Infographic. Manifest edit only; no document authoring yet.
- Decide whether Personal Information Management is a distinct policy or covered by the Privacy Policy. If distinct, add to Forthcoming. If covered, formally retire the question.

9.3 Orphaned from the 15 May Section 8 plan — deferred and tracked

Three items from the 15 May Section 8 rebuild pass were never picked up, the umbrella architecture having been reverted before the next chat. They remain architecture-neutral and are worth preserving in case they become relevant:

- 8.2 Cross-reference cleanup. Find and correct lingering references to the superseded “D9815 Bullying and Harassment Policy” (the 2024 policy retired when the RR Member Conduct Policy and RR Bullying and Harassment Procedure were created). Needs the current suite .docx files uploaded to read them in.
- 8.5 District Leadership Team review of Risk Register reviewer flags. Substantive editorial questions on CSW Standards 1, 3, and 9. DLT to accept, modify, or reject 5 yellow-highlighted proposed new controls and 6 italic-red reviewer notes. Risk Register then bumps to a clean version.
- 8.6 Carried-forward Risk Register treatments. Standards 1, 3, and 9 retain original 2022 commitments not yet delivered. For DLT review.
- 8.7 Appendix F6 Compliance Checklist decision. Whether it becomes a VA Procedure appendix, a standalone D9815 form, or content folded into the master CSW Policy.

10. The comprehensive review — the work for the next session

The single biggest piece of work flagged for the next session is a comprehensive review of every document in the suite (~24 current documents plus the 5 Forthcoming and 3 Retired entries) against the Registry manifest. The purpose: confirm that what the Registry says about each document is true.

What the review is for

The documents have been built across multiple sessions over several weeks. The manifest has accumulated metadata about each (filename, version, status, owner, authors, contact, next review). As the work has progressed, conventions have shifted (filenames, email addresses, authorship rules). The review is the moment to verify that every entry in the Registry is consistent with the actual document it describes.

How the review will run

Barry will locate each document's final version (which may involve checking Teams, SharePoint, local drives, and email trails) and upload them to the new chat session. For each document the new session will:

- Open the .docx and read its cover-page Authorisation block, footer, version history appendix.
- Compare the document's self-recorded version, filename, and authors against the manifest entry.
- Flag any disagreement: the document might say one thing while the manifest says another. The manifest is canonical, but the document is the artefact a reader sees, so disagreements need to be resolved deliberately.
- Update the manifest where needed (e.g. the document's version has actually moved on; the title has changed; the contact email is stale).
- Run the email-only check: confirm every email address in the document is @rotary9815.org.au.

At the end of the review pass the manifest will be authoritative and the Registry will accurately catalogue the current state of every document. Any documents that have drifted will be either brought back into line or formally bumped to a new version that reflects the drift.

Practical note on chat sizing

The review is large enough to be its own chat session. Uploading 24+ documents loads their content into the session context; doing the review alongside other work risks the chat becoming unwieldy. The recommendation is that this v1.1 briefing is the sole input for the next chat, and the review is what that chat is for.

11. How to use the build pipeline

1. Edit registry.json (manifest) and/or build_registry.py / build_lifecycle.py for content changes.
2. For Registry rebuild: run python build_registry.py inside the registry_build/ directory. Output: D9815 Document Registry.docx.
3. For Lifecycle drafts rebuild: run python build_lifecycle.py inside the lifecycle_drafts/ directory.
4. Validate: python /mnt/skills/public/docx/scripts/office/validate.py [file].docx.
5. Render to PDF for visual check: python /mnt/skills/public/docx/scripts/office/soffice.py --headless --convert-to pdf [file].docx; pdftoppm -jpeg -r 100 [file].pdf page.
6. Push to user via present_files.

12. Key files in the build environment

File path	Purpose
<code>/home/claude/registry_build/registry.json</code>	The manifest. Single source of truth for the Registry.
<code>/home/claude/registry_build/build_registry.py</code>	Builds the Registry .docx from the manifest.
<code>/home/claude/registry_build/apply_styles_patch.py</code>	Defines the Word paragraph styles. Applied to every emitted document.
<code>/home/claude/registry_build/template.docx</code>	The Rotary template. Carries cover banner, header, footer, Authorisation table, base styles.
<code>/home/claude/lifecycle_drafts/build_lifecycle.py</code>	Builds the Lifecycle Policy and Procedure .docx files.
<code>/home/claude/lifecycle_drafts/build_briefing_v1_1.py</code>	Builds this briefing (v1.1).
<code>/mnt/user-data/outputs/</code>	Where finished documents are placed for the user to download.

13. How the work has been conducted

- Barry is the Governance Chair making decisions on the floor. His authority over the lifecycle drafts is uncontested in this work — he proposes, drafts, and decides. Substantive critique from Claude is welcome but the call rests with Barry.
- Major changes are recorded in the manifest's version_history and surfaced in the Registry's Appendix A. Every visible change gets a row.
- Content edits arrive in three forms: Barry uploading a reviewed .docx with highlights and strikethroughs (extract changes from the XML); Barry stating changes in chat (apply directly); Barry asking for a structural rework (propose, get sign-off, then implement).
- Bullets and numbered lists must use the ListBullet and ListNumber styles — the v1.5 refactor moved formatting out of inline run properties and into the style sheet. Any new emitter functions should follow this pattern.
- Template substitutions must use sub_regex_in_file, not sub_in_file. The v3.3 refactor swept the existing code; new code should not regress.
- Where Claude has misread an instruction, Barry has been generous in correcting (e.g. the misreading of strikethrough as whole-paragraph deletion in the v1.5 review). Claude's job is to verify rather than guess where ambiguity exists.

14. Working method — assertions about documents must be verified before they are made

When Claude makes any factual claim about what an existing document says — its text, its structure, the presence or absence of specific content, whether a cross-reference exists, what a footer reads, etc. — Claude reads the file first, quotes the relevant text, and only then states the claim. This applies whenever the claim would inform a decision or trigger a change.

The verification is visible in the response. Either through a quoted snippet (“Line N reads: ...”) or through a short verification preamble (“Checked /path/to/file, Section X — the current wording is: ...”). The user should be able to see that the verification happened.

This rule applies even when Claude is confident. The failure mode is not lack of knowledge — it is the substitution of remembered-content for read-content during the flow of drafting. The verification step is what prevents that substitution.

The rule does not apply to general knowledge claims (for example, legislation summaries, suite conventions stated elsewhere in the briefing, things the user has just said in the conversation). Those have their own bases.

15. Rotary context

The District operates under a four-layer Rotary hierarchy: Rotary International (global) → Zone 8, Rotary South Pacific (regional) → Rotary Australia (national) → District 9815. When external Rotary authorities are named in District documents, RI is named for matters of global governance and policy; Rotary Australia is named for matters of national administration (screening, insurance, the Rotary Club and DIO Handbook). Zone 8 is implicit in Rotary Australia references.

The District comprises approximately 30 clubs in Victoria. The documents being maintained are read by clubs, club Presidents, club Secretaries, the District Leadership Team, and members of the public who land on the District website.

16. Starting the next session

1. Read this briefing in full. Read userMemories. Both are needed before substantive work begins.
2. Verify the working environment: the four current files (registry.json, D9815 Document Registry.docx, D9815 Policy Lifecycle and Approval.docx, D9815 Procedure Policy Lifecycle.docx) plus the build scripts may already be on disk from a prior session. If not, Barry will upload them or rebuild from manifest.
3. Ask Barry which document he is uploading first, and begin the comprehensive review one document at a time. The review is sequential, not parallel.
4. For each uploaded document, compare against the manifest entry; flag discrepancies; update the manifest where needed.
5. Do not assume context. The conversation history of prior sessions is not in this one. Verify rather than guess.

17. Version history of this briefing

Version	What changed
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v1.0 (25 May 2026)	Initial continuation briefing. Captured the lifecycle work, the architecture, the Committee, the decisions, the build pipeline, the file paths, and the Rotary context as at the end of the 25 May session.
v1.1 (26 May 2026)	Added Section 4 (suite architecture, in response to a question that surfaced in the 26 May session). Added Section 8 (Forthcoming-list audit against the 15 May Section 8.3 plan). Reframed Section 9 (Open items) into three buckets, including a new 9.2 (audit additions) and 9.3 (orphaned items from the 15 May Section 8 plan). Added Section 10 (the comprehensive review plan for the next session). Refocused the document as the entry point for the comprehensive review rather than a session-end retrospective.
v1.2 (27 May 2026)	New Section 14 added: “Working method — assertions about documents must be verified before they are made.” Locks in a protocol that requires Claude to read a file before stating what it contains, with the verification visible in the response, applied across all factual claims about document content. Anchored by an incident in the 27 May session where Claude asserted that the Responding and Reporting Procedure Appendix B contained “Tell them you believe them” wording that did not in fact exist. Previous Sections 14, 15, and 16 renumbered to 15, 16, and 17. Footer pattern updated from “Filename:” to “Document:” to match the suite convention used by the procedures and Plain Language Guides.