

**Rotary International  
District Administration Guide  
and  
Leadership Organization  
District 7020**

Adopted by Resolution Passed at  
The District Conference  
On May 9, 2008

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## **I    Introduction**

District 7020 is unique as a District within Rotary International and needs to set certain guidelines in place to assist the incoming and current leadership in their administration of the District. This Manual is intended to be a comprehensive guide to the “tried and true” procedures that have worked over the years for those who have gone before.

In no way should any recommendation in this Manual contradict or supersede the Rotary International Manual of Procedure or Code of Policies. The rules of Rotary International must always apply and be adhered to by the leadership. Therefore, this Manual is consistent with the Manual of Procedure but provides more detail in some cases and applies the rules to the unique aspects of the District. This Manual will try to only repeat what is already in the Manual of Procedure when necessary for emphasis.

## **II    The History**

District 7020 originally incorporated the entire Caribbean. However, as the clubs continued to grow and develop, the District became too large a geographic area for any one Governor to cover all the countries in a reasonable time period. The entire Caribbean area was un-districted until July 1, 1974 when it was designated as District 404. On July 1, 1981, District 405 was created for the clubs in the Eastern Caribbean, south of the island of St. Martin/St. Maarten, and the north and Western Islands remained as District 404.

District 404 was a part of Rotary International's Sacama Zone 5 that was predominantly South America and Spanish speaking.

On July 1, 1991, the District number was changed to 4040 to be consistent with the worldwide four-digit numbering by Rotary International.

The January 1992 Council on Legislation adopted Enactment 92.140 which transferred District 4040 from Sacama Zone 5 to USCB Zone 10 with effect from July 1, 1992.

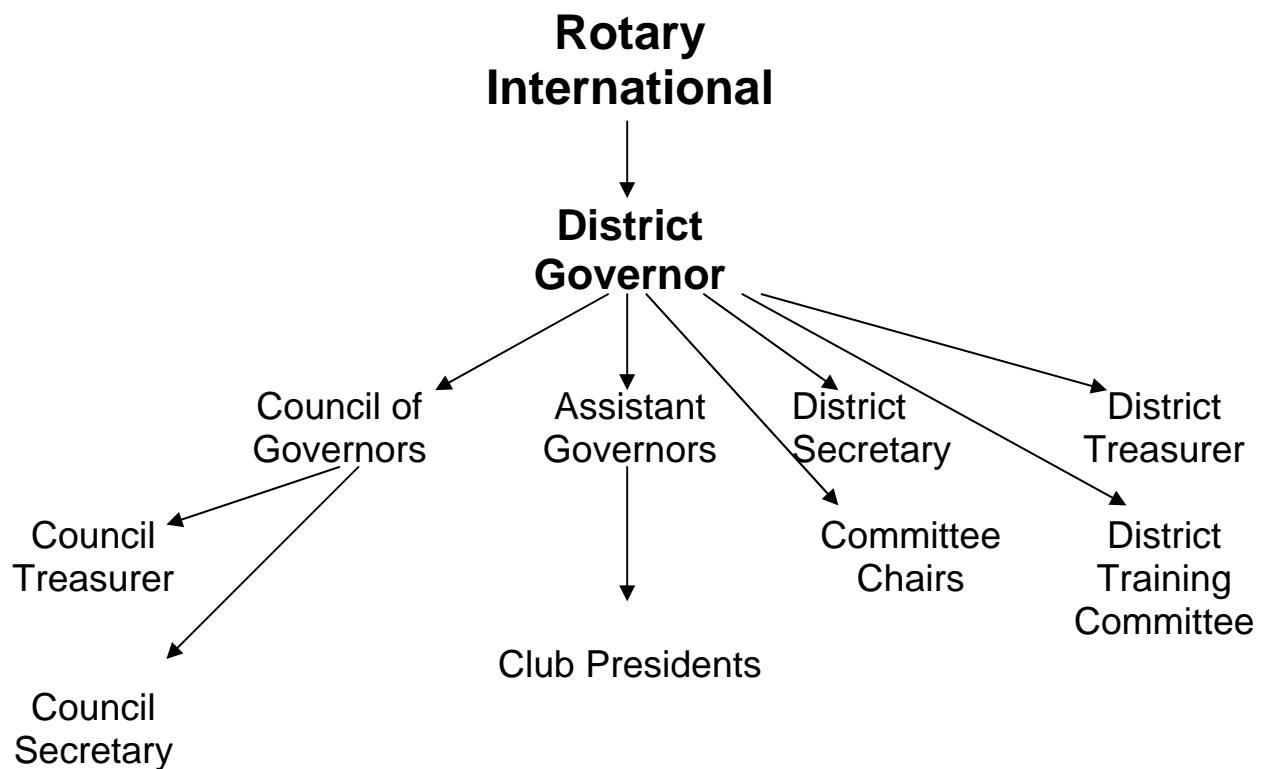
At its March 1992 meeting the Board of Directors of Rotary International requested the General Secretary to give the District a new number in harmony with the numbers used by the other districts in USCB Zone 10. Consequently, District 4040 was renumbered as District 7020 with effect from July 1, 1992.

The Council on Legislation in 1995 then realigned the districts around the world and on July 1, 1995 placed District 7020 into Zone 21, the new name for the old Sacama Zone. This decision did allow District 7020 to affiliate with Zone 34, the Southeast United States, for communication and training purposes.

At the Council on Legislation in January 1998, a resolution was passed to move District 7020 into Zone 34 effective on July 1, 1998. The District has thrived within this Zone with increased involvement in Rotary International.

As of May 2008, there are 70 clubs in ten countries, on fourteen islands with over 2,338 Rotarians.

### **III The Organization Chart**



## **IV The District Governor**

The District Governor:

1. Shall meet all the qualifications for the position as outlined in the Manual of Procedure. It is recommended that he/she has served as a functional Assistant Governor.
2. Is an officer of Rotary International.
3. Is recommended by the Nominating Committee of the Council of Governors and then nominated by the clubs in the District at the District Conference and elected by the Annual Convention of Rotary International.
4. Shall begin his/her term of office on July first of the year for which he/she was elected.
5. Shall participate in all training designed for incoming Governors by the Zone and Rotary International.
6. Shall be prepared to administer the District in an organized and efficient manner.
7. Shall assist in recruiting future District Governors.
8. Shall involve the incoming Governors in all District meetings and keep them informed of activities within the District.
9. Shall be knowledgeable of the rules outlined in the Manual of Procedure and the District Manual.
10. Shall, prior to taking office, arrange to obtain the appropriate regalia (The English medal and the Past Governor's Pin) for the soon to be Immediate Past District Governor as well as the regalia for his/her Secretary and Treasurer. This would include updating the three neck chains for the District Governor, the Secretary and the Treasurer. The Council Secretary can assist with this function.
11. Must ensure that a report is made to the District Conference on the current finances, the last audit and the budget for the upcoming year.

12. Shall follow up with clubs to ensure that the club responsible is supporting any matching grants from The Rotary Foundation. He/she shall also ensure that the documentation process is completed in a timely manner and any outstanding projects are brought to completion.
13. May organize a hand-over event in order to turn the District officially over to the incoming Governor. However, this is at the discretion of both District Governors who will take into consideration the cost of the event as well as the need to support the club hand overs at the end of the year.
14. Should consider utilizing the official logo of the District that includes a hibiscus. This logo should be used appropriately without detracting from the Rotary International logo. The District Governor may also design his/her own logo for the year if he/she so chooses, but cannot detract from the Rotary International logo.
15. Receives a grant from Rotary International as well as a portion of the District Dues that are used to administer the District.

## **V The District Governor Election Process**

The Nominating Committee for District Governor is made up of the five (5) most recent Past District Governors (who are available and willing to serve and are still resident in the District). The Immediate Past District Governor (or if he/she is unavailable or unwilling to serve or is not still resident in the District, the next most recent Past District Governor) shall serve as Chair of the Nominating Committee. Should there not be five (5) such Past District Governors, the District Governor shall appoint additional suitable persons from among other Past District Governors so that the number of members of the Nominating Committee is five (5).

The current District Governor shall request suggestions for nominations from the Club Presidents for the future District Governor. Those suggestions should be sent to the Nominating Committee for consideration no later than December 31<sup>st</sup> of each year.

The Nominating Committee shall be charged with the duty to seek out and propose to the Council of Governors and the District Governor the best available candidate for District Governor. The District Governor will inform the clubs of the District the name and club of the nominee. The Council will put forward that nomination to the District Conference.

The selection and nomination procedure will follow the Rotary International Bylaws.

The District must select its District Governor during the District Conference held two years prior to his/her term (e.g. the 2008-2009 District Governor is selected at the 2006 District Conference). The nominee will be named as governor-elect at the following International Convention (e.g. 2007) and will attend the next International Assembly (e.g. early 2008) to receive his/her training. The nominee will also attend the Zone Institute as DGN in 2006 and as DGE in 2007. Essentially, this provides two years for the Rotarian to prepare for his/her year as District Governor.

As soon as the candidate is nominated, he/she needs to prepare a one-page resume giving particulars of his/her personal, business and Rotary life. This resume along with two professional photographs should be provided to the Nominating Committee. At the District Conference where the delegates nominate the candidate, he/she should introduce himself/herself to the Conference by providing a brief acceptance speech.

Every effort will be made by the Nominating Committee to rotate the office of District Governor around the countries and islands of the District. It is important for Rotary in the District to continue to seek qualified District Governors from each island. However, the overriding consideration must at all times be to select and elect the candidate best qualified for the position.

## **VI The Council of Governors**

The Past District Governors provide a reservoir of talent and experience. Therefore, all Past District Governors resident in the District will constitute the Council of Governors acting in an advisory capacity to assist the District Governor at his/her request and under whose direction and supervision the Council shall function.

The District Governor shall be the convener of the Council and shall preside as its Chair. A Past District Governor shall be appointed to be the Council Secretary and a Past District Governor shall be appointed to be the Council Treasurer.

The District Governor Nominee and the District Governor Elect shall also sit on the Council of Governors.

The Council shall meet twice each year. The first meeting will normally be on the first or second Saturday in December and the second will be at a convenient time during the District Conference. These times may be adjusted based on the circumstances at the time.

The Council of Governors serves in an advisory capacity and is expected to assist the District Governor wherever possible. The Council will use some of its meeting time to “brain storm” and consider creative and innovative ways to resolve difficult situations in the District.

The District Governor will provide an update on the District at each Council meeting. Included will be information about the clubs (strong and weak), the financial position, The Rotary Foundation and any other pertinent situations about which the Council needs to be aware or with which it may be able to assist. The DGE and DGN will also provide reports to the Council at each meeting of the Council.

## **Council Secretary**

The Council of Governors shall appoint a Secretary from among its Past District Governors. There will be no fixed term to the appointment, allowing the individual to serve as long as he/she is functioning well.

The Council Secretary:

1. Shall serve as recording secretary for both meetings during the year.
2. Shall assist the District Governor in organizing the agenda for both meetings.
3. Shall assist the Council in ensuring that the District is following the rules of Rotary.
4. Shall assist the District Governor and the incoming District Governors in understanding the traditional approach to situations in the District.

## **Council Treasurer**

District 7020 appointed a Council Treasurer, formerly known as the Permanent Treasurer, in order to have one person on a consistent basis oversee the financial activities of the District. The District has numerous countries, currencies, exchange practices and difficulties in abiding to money regulations on a consistent basis. The Council Treasurer is a Past District Governor who understands the District in all its nuances and can ensure that at the end of the day all the dues are appropriately paid and funds are appropriately credited from year to year. The Council of Governors will appoint any future Council Treasurer based on this Manual.

The Council Treasurer will assist the District Treasurer in any way he can without interfering with the day to day operations of the District. He/she is there to make sure that all the agreed financial rules are adhered to. He/she brings consistent structure to the position.

The Council Treasurer will ensure that the District Treasurer bills every club with copies to the Assistant Governors. The Council Treasurer will receive the appropriate portion of the dues for the District Funds, provide a report on the status of the funds and liaise with the District Treasurer on outstanding dues. He/she maintains the District Funds and ensures that the rules of Rotary International are followed.

### Audit Committee

The Audit Committee is made up of three members of the Council of Governors and should rotate on a regular basis. The Audit Committee should ensure that the audits from year to year are performed as outlined by the Manual of Procedure.

## **VII      District Appointments**

The District Governor must announce his/her appointments to the District as early as possible, but no later than the District training for the year. The following positions must be appointed at a minimum along with any requirements made by Rotary International:

1. District Secretary – This Rotarian should be a Past President who has a good understanding of the Manual of Procedure and the workings of the District. He/she must be readily accessible to the District Governor. The District Secretary will assist the District Governor with all secretarial aspects of the administration of the District, including correspondence and reporting requirements. He/she will oversee the club attendance reporting to ensure that the District and Rotary International receive attendance reports from 100% of the clubs prior to the deadlines provided. This position is appointed on an annual basis.

2. District Treasurer – This Rotarian should also be a Past President who has a good understanding of the rules of Rotary and the workings of the District. He/she must ensure that the financial position of the District Governor is properly recorded and all reporting is provided on a timely basis. He/she also must ensure that each club remits their dues to the District and to Rotary International prior to the deadlines provided. All records need to be submitted for an audit at the completion of the year. He/she will report to the District Conference prior to the year the budget of the District and will report to the District Conference after the year the audited statements of the District. The District Treasurer will work with the Council Treasurer to ensure that the rules of handling money in the District are followed and that the clubs pay the appropriate dues on time. Working with the Council Treasurer he/she will also see that the distribution of funds are in accordance with the District rules and the rules of Rotary International. This position is appointed on an annual basis. It is important that the District Treasurer notify his/her successor prior to June 30, at the end of the year, of any unpaid district dues. This information will allow the new Treasurer to follow up on outstanding dues. All accounts payable should be settled within sixty days of the year-end including any surplus that is sent to his/her successor.
  
3. District Training Committee Chair – This Rotarian should be a Past District Governor who is well versed on the rules of Rotary as well as the District. He/she must be able to train and motivate Rotarians as well as teaching them how to use the materials of Rotary International to organize successful clubs. The District Training Committee Chair is available to the Clubs to assist them with training, but primarily organizes in collaboration with the Committee the three District training meetings (Assistant Governors, including other District Leadership; PETS, including Presidents and Secretaries; and the District Assembly, for all other club leaders). His/her training, planning and organization are done in conjunction with the District Governor who has the ultimate responsibility. It is recommended that this position be appointed for three years in order to provide continuity. This person should be a certified Rotary Leadership Institute (RLI) discussion leader.

4. Committee Chairs – The District Governor will appoint a number of individuals to chair certain District Committees to oversee and develop specific areas of Club or District administration. These Chairs are responsible for the specific area appointed by the District Governor and report to the District Governor with their activities and proposed projects. Examples would be Conference, Publications, Web-site, aspects of the four avenues of service, and The Rotary Foundation. These positions are appointed on an annual basis. However, the Chair of the Rotary Foundation Committee should be appointed for a three-year term on the committee in order to provide for continuity. This allows the District Governor flexibility to re-appoint or appoint a new Chair while the prior Chair continues on the Committee.

The committees should only be appointed to be effective working committees and allowing for the involvement of as many Rotarians as possible in the affairs of the District, not just for the sake of having a committee. The DG should provide each Committee with the expectations for that Rotary year.

## Standing Committees

It is important to achieve stability in the planning and development of the District. Toward this end the following standing committee members are appointed for staggered three-year terms. This will allow each incoming District Governor to appoint a Chair to most of the committees and a member to the Finance and Rotary Foundation Committees. Each Committee must have at least three members in order to achieve the intended purpose. Due to the geographic nature of District 7020, it is recognized that the Chair of each committee should be easily accessible to the District Governor. The two past Chairs would be from other countries but should participate through communication, even if they cannot physically attend meetings of the committee. It is recommended that members have access to email in order to expedite virtual meetings.

<u>Committee</u>	<u>Chair</u>
Membership and extension	District Governor appointment
Finance	Council Treasurer
Public Relations	District Governor appointment
Publications (newsletter, Directory)	District Governor appointment
District Training Committee Chair	District Governor appointment
District Conference	District Governor appointment
The Rotary Foundation	District Governor appointment
Rotaract	District Governor appointment
Interact	District Governor appointment
Disaster Relief	District Governor appointment

The District Governor may appoint other committees from time to time in order to achieve the goals and objectives of the District and Rotary International. Every effort will be made to make these functional and effective committees existing for a specific purpose.

### Alumni Association

The District Governor will appoint a Chair each year to encourage all alumni of the District to stay involved with Rotary International and the District. Alumni should include all those who have received scholarships, participated on Group Study Exchanges, etc. These non-Rotarians who have been ambassadors of Rotary should still be looked at as making an impact on their communities for and with Rotary.

## **VIII      Assistant Governors**

The Assistant Governors of the District are crucial to the efficient administration of the District and are appointed by the District Governor. Each Assistant Governor is responsible for a number of clubs with which he/she works to assist them in developing the club, reporting on a timely basis and providing all the programs as required by Rotary International. The Assistant Governor is responsible for assisting the District Governor in the execution of tasks and duties; for acting as a liaison between clubs and the District Governor; for interacting with other Assistant Governors, committee members, and other District leaders; and for helping to promote Rotary International and Rotary Foundation activities and programs within the District.

Club Presidents should receive the Assistant Governor with the dignity deserved as the District Officer responsible for that Club.

Minimum requirements for qualifications of the Assistant Governor include:

1. Service as a Club President for a full term of office and performed in an effective manner.
2. Membership in good standing in a club in the District for at least three years.
3. Willingness and ability to accept the responsibilities of Assistant Governor.
4. Demonstrated outstanding performance at the Club and/or District level, and
5. Potential for future leadership in the District.
6. It is recommended that they be certified Rotary Leadership Institute (RLI) discussion leaders.

The Assistant Governor:

1. Shall meet with and assist the incoming club presidents in his/her assigned area before PETS prior to the beginning of the Rotary year to discuss club goals and to review the Planning Guide for Effective Rotary Clubs. They must ensure that the Planning Guide is completed on time.

2. Shall ensure that the Presidents complete the goals and objectives as outlined in the Planning Guide for Effective Rotary Clubs.
3. Reports to the District Governor immediately after each club visit.
4. Schedules and plans for the official visit to the area of the District Governor, whose primary purpose should be to advance Rotary in the District. The District Governor issues final schedule approval.
5. Should monitor club activities as an important part of the job and should include:
  - Club budgets, focusing on timely budget preparation, separation of charitable and club expenditures, and specific allocations for proposed service projects.
  - All reporting requirements to Rotary International and the District.
  - Payment of dues to Rotary International and the District.
  - Each club's performance with respect to service projects.
6. Updates the District Governor on progress within the assigned clubs, including attendance at local and District meetings, local net growth, and financial status.
7. Assists the District Governor in organizing and strengthening new clubs: overseeing the extension survey; making recommendations for special representatives and "sponsor clubs"; adopts and adheres to the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws.
8. Participates in meetings with District leaders.
9. Encourages clubs to follow through on requests and recommendations of the District Governor.

10. Must attend and participate in
  - The Assistant Governor and District Leadership training session.
  - The President Elect Training Seminar
  - The District Assembly, and
  - The District Conference.
11. Must visit each assigned club in his/her area regularly with a minimum of one visit each quarter of the Rotary year.
12. Holds regularly scheduled meetings (preferably monthly and no less than quarterly) with club presidents to discuss the business of the clubs and resources available to them, along with goals, programs, and objectives of the District and Rotary International.
13. Promotes cordial relationships among the clubs, between the clubs and the District, and between the clubs and Rotary International.
14. Apprises (formally and informally) the District Governor and other District leaders of clubs' progress and concerns.
15. Identifies outstanding Rotarians and/or club projects to be recognized by the District Governor.
16. Works with the District Governor and other District leaders to develop District goals.
17. Advises the incoming District Governor (when asked) on selections for District committees.
17. Suggests ways to advance Rotary and to address organizational concerns.
18. Promotes attendance at PETS, the District Assembly, the District Conference and other District meetings.
19. Identifies potential District officers and encourages them to participate in District activities.
20. Supports decisions made by consensus among District leaders.

21. Participates in Rotary Foundation programs, annual and special giving events and other assignments related to The Rotary Foundation as necessary.
22. Attends and participates in club meetings as requested by the District Governor for a specific purpose. This involvement may be in addition to the routine meetings attended by the Assistant Governor.
23. Attends and participates in club assemblies, if so invited by the club president.
24. Assists in the maintenance of all Rotary standards and values, as well as in the motivation, inspiration, and education of all Rotarians in the District. Also assists in the promotion of all Rotary activities and programs and in the explanation of the Rotary International theme for the year.
25. The Assistant Governor should strongly promote to Presidents Elect that they complete the RLI training prior to taking office.
26. Assistant Governors who are certified RLI discussion leaders should be available to participate in District training sessions.

The District Governor appoints the Assistant Governors because of their reputation as good motivators, organizers and leaders. They are expected to do an excellent job for the District and Rotary International. If, for some reason, the Assistant Governor is not effective in his/her role, The District Governor is obligated to replace him/her.

The Assistant Governors must be appointed annually. However, it is expected that they hold office for a maximum of three consecutive terms if they are effective in the role. The District Governor has the discretion to change the Assistant Governor.

## **IX District Finance**

The District must follow all the recommended rules of Rotary International as spelled out in the Manual of Procedure. The District Treasurer must work closely with the Council Treasurer to ensure accountability and efficiency.

### **Functions of the District Treasurer**

1. Budget – The District Treasurer must report the budget for his year at the District Conference immediately preceding his year of office.
2. Current Finances – The District Treasurer must report the status of current finances of the District at the District Conference during his year in office.
3. Audit – The District Treasurer must report the audited financial statements to the District Conference immediately after his year of office.
4. District dues – The District Treasurer must ensure that every club pays their District dues on time. If not, recommendation should be made to the District Governor to suspend the club because of lack of payment of District dues. The District Treasurer must work with the Council Treasurer in respect to the collection of dues.
5. Accounts - The District Treasurer must ensure that complete and accurate accounts are kept as related to all District Dues and monies received by the District for use by the District Governor. He/she will maintain the operational funds for the District Governor and forward information to the Council Treasurer. He/she will also forward the funds for the District Disaster and Foundation to the Council Treasurer on a timely basis.
6. Budget from Rotary International – The District Treasurer in conjunction with the Council Treasurer must ensure that accurate

forecasting is made for Rotary International to determine the best allocation for the District Governor's expenses. Together they will also reconcile to actual expenses to ensure the District receives complete reimbursement.

7. Donations in kind – The District Treasurer should ensure that donations in kind are accounted for on a cost basis to ensure that the true cost of the activities of the District Governor is documented.
8. Successor – It is important that the District Treasurer inform the incoming District Treasurer of any outstanding District dues in order that the dues collection process continues with new District Treasurer.
9. Accounts Payable - All accounts payable should be paid within sixty days of the year-end, including any surplus paid over to the incoming Treasurer.

## **District Dues**

The District Dues are determined and agreed at the annual District Conference and currently are US\$26 per member per year to be paid semi annually. The calculation is based on the number of members on July 1 of each year and payable in full on July 1 or in two equal installments (July and January).

The present breakdown is as follows:

District Governor travel, activities, etc.	US\$19
Assistant Governor travel, activities, etc.	US\$ 5
District Disaster Fund	US\$ 5
District Foundation	US\$ 1
Total	US\$30

The Alumni Association may be reimbursed up to US\$0.50 per member for the cost of an annual meeting, if the meeting is approved by the District Governor and is fully documented. This would come out of the US\$19 allocated to the District Governor.

Rotary International Dues are stated in the Manual of Procedure and should be paid accordingly using the semi-annual report sent to the secretary of each club. These dues must be paid on time.

Some agreed rules on the appropriate use of funds for the District Governor:

1. Travel and accommodations to visit all the clubs in the District.
2. Cost to attend meetings related to the position. These would include the Rotary Institute and one International Convention. The Rotary Institute in the Zone should be attended for training purposes from nomination through the year as District Governor.
3. Reimbursement would be for economy travel and reasonable accommodations.
4. As Rotary International and the District encourage the spouse to travel with the District Governor around the District, his/her travel cost is reimbursable at the economy rate.
5. If a club or individual provides the District Governor with “free” accommodations or any other assistance that the District Governor would normally pay for, the District Governor must account for the approximate cost as a donation in kind and equivalent expense for accounting purposes. This process ensures that Rotary International and the District understand the true cost of administering this District.
6. The District Governor must produce a District Directory and a newsletter on a monthly basis. These should be cost effective, timely and efficient. The District Directory is preferably complete for distribution at PETS.
7. Although all the above and those specified in the Manual of Procedure are costs that may be reimbursed, the District Governor should be cautious to not overspend the budget that is allocated. The budget does not necessarily cover all costs of the District Governor. Any expenditure over the allocated budget is the responsibility of the District Governor.
8. During the year of the District Governor all efforts should be made to include in the budget and to reimburse from district funds expenses of the DGE and DGN to attend any district, zone or Rotary International training sessions.

Some agreed rules on the appropriate use of funds for the Assistant Governor:

1. The clubs in the Assistant Governor’s area should assist in covering the costs for his official duties.

2. The cost of economy travel and reasonable accommodations for attending the Leadership Training, PETS and Assembly are reimbursable.
3. The cost to travel among the clubs in his/her area is reimbursable.
4. A request within 30 days to the District Treasurer with the appropriate documentation is essential in order to achieve reimbursement.
5. It is clearly understood that the US\$5 per member allocated to the Assistant Governors is not adequate to cover all expenses. It is there to assist as much as possible with out of pocket costs to get the job done well. Therefore, there is no guarantee that repayment in full can be accomplished and any uncovered costs are the responsibility of the Assistant Governor.

## **District Funds**

### **District Disaster Fund**

As District 7020 is prone to disasters, especially hurricanes, this fund was established to be able to quickly respond to the clubs whose communities have been hit by disaster.

1. The District Disaster Fund established for the purpose of providing financial relief in cases of natural disasters within the District or the Zone shall be maintained in United States dollars in a territory where it is lawful so to do and shall be administered by and under the control of a committee comprised of the District Governor, who shall be the Chair, and the Council of Governors.
2. Disbursements from the fund shall require the approval of a simple majority of members of the committee either at a regular meeting or by electronic or other contact. However, to expedite response time to assist in a Disaster, the District Governor with the Council Treasurer may disburse up to US\$2,500 and report to the committee at the next regular meeting.
3. The Fund shall be financed by regular contributions allocated by resolution decided and approved as part of the annual District dues as noted in this document or future resolutions passed by the Clubs.

## **District Foundation**

The District Foundation was established to allow the District to grow a fund that could be used to assist projects in the District. The same committee oversees the Foundation Fund as the Disaster Fund. The same method of disbursement is required. However, the committee must vote on the project prior to disbursement unless there are urgent extenuating circumstances. A simple majority of the committee at a regular meeting or by electronic or other contact is needed to approve the disbursement. Only interest earned on the Fund may be used for a project as the principle is protected for the future. It is anticipated that it will take many years for this Fund to grow to sufficient size to provide assistance to the District.

It is important that the District Foundation in no way detract from the Rotary International Foundation contributions. As a District, we believe strongly in the Rotary International Foundation and must support it in any way we can.

## **X   District Meetings**

District 7020 is spread out over a large geographical area and it is, therefore, only practical for the District to come together once per year. For this reason most of our training sessions and the District Conference are organized for a consecutive time period. This time honored tradition allows the District and Rotarians to minimize their costs and maximize attendance and participation. As most of the meetings are all together, the District strives to minimize duplication in the presentations in order to allow for an overall interesting and diverse program.

These meetings will generally be held in the country of the District Governor in order to ensure his ability to be closely involved with the organization of the event. Unusual circumstances may be considered to move the meetings to another location. The District Council must participate in that decision.

The week of meetings (PETS, Assembly and Conference) must take place between the International Assembly where the District Governor Elect got his training and seven days before the International Convention. This allows for the incoming District Governor to be prepared and trained and avoids interfering with the Convention. District 7020 has generally met in the first week in May, but has the option to meet earlier if it is convenient and cost effective for the District. Serious consideration for an earlier date has been requested by Rotary International and will be considered by incoming District Governors.

Each of the sessions must abide by all the rules for that session as spelled out by the Manual of Procedure and Rotary International.

It is recommended that the organizers utilize the Past District Governors, Incoming District Governors and Assistant Governors as presenters wherever possible. There should also be some external speakers who can bring new and different perspectives on current issues. All speakers should be able to present in an informative and motivational manner.

### Leadership Team Training

1. This training seminar is aimed directly at the incoming Assistant Governors, Committee Chairs and other District Officers to ensure that they are well prepared for their job for the District. It is mandatory that the leadership (Assistant Governors) all attend.
2. All District Officers and Committee Chair are strongly urged to attend. Their roles will also be discussed in order to ensure that the entire team has a good understanding of the District organization as well as the plans for the year.
3. The goal is to provide each Leader with motivation, inspiration and training to allow an excellent job to be done for the District and Rotary International.
4. The Leadership Team Training will take place in early March or as soon after the International Assembly as reasonable.
5. The Incoming District Governor organizes this training seminar with the assistance of the District Training Committee.

## President Elect Training Seminar (PETS)

1. All Presidents Elect and Secretaries Elect must attend the PETS. If for some inescapable reason a President Elect is unable to attend the PETS and cannot send a representative, the appropriate Assistant Governor will organize a special training session prior to the President Elect taking office. According to the Manual of Procedure a Rotarian cannot take the office of the President of a Rotary Club unless they have had the appropriate training. All Club Treasurers are strongly encouraged to attend PETS.
2. The PETS will take place on the Wednesday of the week of meetings.
3. The PETS is designed to provide training, motivation and inspiration to the Presidents Elect and the Secretaries Elect. They must be prepared to administer their clubs in the best possible manner following the guidelines of Rotary International.
4. Other District Officers are welcome to attend as well as other club officers.
5. The Incoming District Governor (DGE) organizes this training seminar with the assistance of the District Training Committee.
6. Sessions will be held during PETS or the Assembly specifically for Club Treasurers.

## District Assembly

1. All Presidents Elect, Secretaries Elect, Club Committee Chairs and other interested Rotarians are invited to attend the District Assembly.
2. The District Assembly will take place on the Thursday of the week of meetings.
3. The District Assembly is designed to provide training, motivation and inspiration to all club leaders to allow them a complete understanding of how to organize and administer a Rotary Club based on the intentions of Rotary International.
4. The Incoming District Governor organizes this training seminar with the assistance of the District Training Committee.

## District Conference

1. All Rotarians are invited to the District Conference.
2. The District Conference will take place on the Friday and Saturday of the week of meetings. The official opening may take place on the Thursday evening.
3. The District Conference should update the District on the status and programs of the District and of Rotary International. The meeting should be motivational and inspirational as well as informative.
4. The current District Governor organizes the District Conference with assistance from the District Conference Committee and the Council of Governors as required.
5. The Past District Governors should be recognized at the Conference and a moment of silence should be held for those Past District Governors who are deceased.
6. There will be a business section of the District Conference to allow for any District business. The financial reports, nomination process, and any resolutions may be brought forward at that time. The delegates must submit any substantive resolutions to the District Secretary prior to the Saturday of the meeting in order to ensure appropriate time for review and consideration. Voting will be according to the rules outlined in the Manual of Procedure therefore it is important to be financially current as a club and to bring to the District Conference the appropriate voting credentials.

## District Conference Committee

1. This Committee is responsible for organizing all the events for the entire week of meetings. They must arrange for the hotel, expedite travel and visas where necessary, registration, funding, entertainment, organize the rooms appropriate for the sessions, etc.
2. The Chair and the Committee should be appointed as soon as possible in order to ensure sufficient planning time. It is recommended that he/she has been an Assistant Governor.
3. The Committee will organize an evening of Home Hospitality.

4. If the Conference Committee achieves excess funds, it is recommended that they assist the District Governor with some of the District expenses that may not have been covered by the District budget, such as extra Group Study Exchange cost and other acceptable expenses. They may also wish to maintain a small fund in trust to use as start up for the next District Conference.
5. The Committee will ensure that professional translators provide excellent English-French simultaneous translation for all sessions. Those who speak French must be able to obtain the same information, training, motivation and inspiration as those who speak English. All speakers who provide handouts should be asked to provide them in both English and French.
6. All supplies owned by the District should be handed over at the end of the District Conference to the incoming District Conference Chair or incoming District Governor in order that he/she can take them back to prepare for the next year's meetings. These supplies would include the country flags, translation equipment, etc.
7. The Committee should at least plan to provide accommodations for the Representative of the President of Rotary International, the District Governor, the two incoming District Governors and the District Training Committee Chair. Usually, the hotel provides gratis rooms that could accommodate these individuals and their spouses.

## **XI Rotary International Nominations**

There are opportunities for District representatives to be nominated for involvement in Rotary International activities. District 7020 strongly encourages Past District Governors or others to agree to any appointments or nominations and to do an exemplary job. This involvement will assist District 7020 to develop its reputation as an effective District in the Rotary world. There are some specific positions that need to go through a selection process as outlined by Rotary International.

The Director of Rotary International representing Zone 34 may appoint a Zone Advisory Committee. The current District Governor will appoint a Past District Governor to serve on that Committee when requested by the Director to do so.

## Council on Legislation

Every three years the Council on Legislation meets and has one representative from each District around the world. The qualifications for this representative are spelled out in the Manual of Procedure and he/she must be a Past District Governor. The Council of Governors selects an individual and an alternate in case the representative cannot attend for some reason. These two individuals are thought by the Council of Governors to be able to best represent the interests of the District at the Council on Legislation. They then put these individuals forward for election at the District Conference in order that the District may ratify the selection. This information is then forwarded to Rotary International.

The representative should consult with the District Governor and any interested Rotarians in order to get some input on the issues to be addressed at the Council on Legislation. The representative should share in writing a summary of the information from the Council on Legislation with the District at the first possible opportunity. He/she should also present it at the District Conference immediately following the Council on Legislation.

It is recommended that the representative attend at least two in a row in order to bring the experience from the first one to future meetings. It is a complex process that needs individuals with experience to assist the process in being efficient and effective.

## Nominating Committee for Director of Rotary International

Every fourth year Zone 34, of which District 7020 is a member, has the opportunity to nominate a Director and alternate to the Board of Rotary International. One Past District Governor from District 7020 needs to be appointed to the Nominating Committee for the Zone to select the nominee and alternate. The same process for the selection of the Council on Legislation representative is followed by the District to select the representative for the Nominating Committee. The Council of Governors recommends the candidates to the District Conference for their ratification.

Any club in the District may nominate an individual to be a Director of Rotary International. The Nominating Committee of the Zone will select the best candidate and alternate for the position.

The next representative from District 7020 should be nominated at the Council meeting of December 2007 for the Nominating Committee to meet in the fall of 2008 to nominate a Director for 2010 – 2012.

## **XII      District Awards**

The District Governor should reward productive and successful clubs and Rotarians during the District Conference through the awards process. There are awards available from Rotary International and The Rotary Foundation that should be given to deserving individuals in the District. The District Governor should be familiar with these awards and ensure that they are presented to the appropriate individuals or clubs.

The District should also have an awards program that recognizes both the clubs and individuals for outstanding work. These awards should be related to the goals and objectives as set by the District Governor prior to the start of his/her year in order that everyone clearly understands what the goals and objectives of the District are and what one needs to do to be recognized for accomplishment.

These awards have included at least attendance, vocational service, community service, international service and donations to the Rotary Foundation.

The District Governor should make every attempt to align the awards with the goals of Rotary International and the District in order that the entire District is working in the right direction.

## **XIII      Amendments**

This manual may only be amended at a District Conference by a poll in which the amendment receives the affirmative vote of at least seventy-five per cent (75%) of the electors present and voting in person or by permitted proxy. All clubs will be notified of the voting and those clubs not represented will have 30 days in which to reply if they have any significant objections.

## **XIV      Resolutions**

Resolutions of a substantial nature may be brought to the District Conference for a vote if they have been presented in writing to the District Secretary or the Council Secretary at least seven days prior to the District Conference. Resolutions may be presented by a Rotary Club in the District or by an individual Rotarian or the Council of Governors. Resolutions also need an affirmative vote of seventy-five percent (75%) of the electors present and voting in person or by permitted proxy to be accepted.

## **XV Youth Exchange**

Youth Exchange is encouraged in our district and Addendum #3 details the policies as related to the District 7020 Youth Exchange Abuse and Harassment Prevention Policy. The District has approved this policy as provided and contingent on the approval of Rotary International. All clubs must be approved for Youth Exchange by the District Administration in order to ensure that the policies for Youth Exchange are being adhered to.

## **Addendum #1**

### **Listing of Clubs by Assistant Governor Responsibility**

Assistant Governor	Netherland Antilles	St. Maarten St. Maarten Mid-Isle St. Maarten Sunrise
	Anguilla French West Indies	Anguilla St. Barthelemy St. Martin Nord
Assistant Governor	Bahamas	Abaco East Nassau Nassau New Providence South East Nassau West Nassau Nassau Sunrise
Assistant Governor	British Virgin Islands	Road Town Tortola
Assistant Governor	Cayman Islands	Cayman Brac Grand Cayman Grand Cayman Central Cayman Sunrise
Assistant Governor	Haiti-South	Les Cayes Jacmel Jeremie Aquin
Assistant Governor	Haiti-North	Pignon Cap Haitian Hinche

Assistant Governor	Haiti-North West	Verrette, L'Artibonite Port de Paix Saint Michel Saint Marc Petite Riviere L'Artibonite
Assistant Governor	Haiti-Central	Delmas Aeroport Port-au-Prince Petionville Mirebelais
Assistant Governor	Jamaica-Central	Black River Christiana Mandeville Maypen Santa Cruz
Assistant Governor	Jamaica-Northeast	Kingston Downtown Port Antonio St. Andrew North LiguaneaPlains Kingston New Kingston Portmore
Assistant Governor	Jamaica-Southeast	Kingston Ocho Rios Kingston East/Port Royal Spanish Town St. Andrew North St. Catherine
Assistant Governor	Jamaica-West	Lucea Montego Bay Montego Bay East Savanna La Mar Negril Falmouth
Assistant Governor	Turks & Caicos Islands	Providenciales Grand Turk

Assistant Governor	USVI-St. Croix	St. Croix St. Croix Harbourside St. Croix Mid-Isle St. Croix West
Assistant Governor	USVI-St. Thomas/St. John/Charlotte Amalie	St. Thomas St. Thomas East St. Thomas II St. Thomas-Sunrise
	USVI-St. John	St. John

## Addendum #2 Listing of Past District Governors

### District 404

1974-75	Dr. John Watts	Grenada
1975-76	Jean Paysant	Martinique
1976-77	Serge Mees	Guadeloupe
1977-78	Osmond Hale	Trinidad
1978-79	W. Fritz Humphries (dec'd)	St. Thomas, USVI
1979-80	Miles A. Rothwell	Barbados
1980-81	Harold (Charlie) Braham (dec'd)	Kingston, Jamaica
1981-82	Constantinos Coulianos (dec'd)	St. Thomas, USVI
1982-83	Arthur Hunter	Cayman Islands
1983-84	Keith Duncombe (dec'd)	Bahamas
1984-85	Berthany Madhere (dec'd)	Haiti
1985-86	Michael S. Fennell	Kingston, Jamaica
1986-87	Al Cartwright	Bahamas
1987-88	Aadu Abel	St. Maarten
1988-89	John Furze (dec'd)	Cayman Islands
1989-90	Alvaro Casserly	Kingston, Jamaica
1990-91	Sanseric Powell (dec'd)	St. Croix, USVI

### District 4040

1991-92	Barry Rassin	Bahamas
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District 7020		
1992-93	Richard Harris	Cayman Islands
1993-94	Pishu Chandiram	Montego Bay, Jamaica
1994-95	Edgar M. Iles	St. Croix, USVI
1995-96	John E. Robertson	Bahamas
1996-97	Reinier Heere	St. Maarten
1997-98	Mulo Alwani	St. Thomas, USVI
1998-99	Garfield Thomas	Mandeville, Jamaica
1999-00	Robert (Bobby) Bodden	Cayman Islands
2000-01	Edward (Eddie) Bostwick	Bahamas
2001-02	Richard Grant	St. Croix, USVI
2002-03	Amos Durosier	Haiti
2003-04	Keith Daley (dec'd)	Kingston, Jamaica
2004-05	Victor Gibbs	St. Martin
2005-06	Tom Lightbourne	Turks & Caicos
2006-07	Alastair Paterson	Cayman Islands
2007-08	Richard McCombe	Bahamas
2008-09	Rupert Ross	St. Croix, USVI
2009-2010	Errol Alberga	Jamaica
2010-2011	Diana White	St. Thomas, USVI

## **Addendum #3**

### **District 7020 Youth Exchange Abuse and Harassment Prevention Policy**

#### **District 7020 Youth Exchange Abuse and Harassment Prevention Policy**

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##### **1. Statement of Conduct for Working with Youth**

District 7020 is committed to creating and maintaining the safest possible environment for all participants in Rotary activities. It is the duty of all Rotarians, Rotarians' spouses, partners, and any other volunteers to safeguard to the best of their ability the welfare of and to prevent the physical, sexual, or emotional abuse of children and young people with whom they come into contact.

##### **2. Definitions**

**Volunteer:** Any adult involved with Rotary Youth Exchange activities who has direct interactions, either supervised or unsupervised, with students. Volunteers include, among others: club and district Youth Exchange officers and committee members; Rotarian counselors; Rotarians and non-Rotarians and their spouses and partners who host students for activities or outings or who might drive students to events or functions; and host parents and other adult residents of the host home, including siblings and other family members.

**Student:** Any individual who is participating in a Rotary Youth Exchange,  
regardless of whether he or she is of legal age of majority.

**Sexual abuse.** Engaging in implicit or explicit sexual acts with a young person or forcing or encouraging a young person to engage in implicit or explicit sexual acts alone or with another person of any age, of the same or opposite sex. This includes non-touching offenses, such as indecent exposure or showing a young person sexual or pornographic material.

**Sexual harassment.** Sexual advances, requests for sexual favors, or verbal or physical conduct of a sexual nature. In some cases, sexual harassment precedes sexual abuse and is used by sexual predators to desensitize or groom their victims.

Some examples of sexual harassment include:

- Sexual epithets, jokes, written or spoken references to sexual conduct, talking about one's sex life in the presence of a young person, and comments about an individual's sexual activity, deficiencies, or prowess
- Verbal abuse of a sexual nature
- Display of sexually suggestive objects, pictures, or drawings
- Sexual leering or whistling, any inappropriate physical contact such as brushing or touching, obscene language or gestures, and suggestive or insulting comments

### **3. Incorporation of District Youth Exchange Program and Liability Insurance**

Rotary District 7020 Youth Exchange program is incorporated as Rotary District 7020 Youth Exchange Program, Incorporated, under the laws of the territory of the United States Virgin Islands.

Rotary District 7020 Youth Exchange program is insured

### **4. Volunteer Selection and Screening**

District 7020 will maintain in perpetuity all records of criminal background checks, waivers, and screening for adults working with minors.

**All volunteers** interested in participating in the District 7020 Youth Exchange program must meet the following requirements:

- Complete the Youth Volunteer Affidavit form and authorize the district to conduct a criminal background check (subject to local laws and practices).
- Undergo personal interviews.
- Provide a list of references for the district to check.
- Meet RI and district eligibility requirements for working with students. RI policy prohibits any volunteer who has admitted to, been convicted of, or otherwise been found to have engaged in sexual abuse or harassment from working with youth in a Rotary context. If an individual is accused of sexual abuse or harassment and the investigation into the claim is inconclusive, additional safeguards must be put in place to ensure the protection of any youth with whom the individual may have future contact as well as for the protection of the accused. A person later cleared of charges may apply to be reinstated to participate in youth programs. Reinstate is not a right, and no guarantee is made that he or she will be reinstated to his or her former position.
- Understand and comply with RI and district guidelines for the Youth Exchange program.

**Host families** must meet the following selection and screening requirements, in addition to those listed above:

- Host families must undergo a comprehensive interview that determines their suitability for hosting exchange students. Host families must demonstrate:
  - Commitment to the safety and security of students
  - Motivation for hosting a student consistent with Rotary ideals of international understanding and cultural exchange
  - Financial ability to provide adequate accommodations (room and board) for the student
  - Ability to provide appropriate supervision and parental responsibility that ensures the student's well-being
- Host families must complete a written application.
- Home visits must be conducted for each family and should include announced and unannounced visits, both before and during the placement. Home visits must be conducted annually, even for repeat host families.
- All adult residents of the host home must meet the selection and screening guidelines. This includes adult children of the host family and other members of the extended family who are permanent or part-time residents in the home.

**Rotarian counselors** must meet the criteria for all volunteers, as well as the following:

- Counselors must not be a member of the student's host family.
- Counselors must be trained in responding to any problems or concerns that may arise during the exchange, including instances of physical, sexual, or emotional abuse or harassment.

## **5. Student Selection and Screening**

*All students* interested in participating in the District 7020 Youth Exchange program must meet these requirements

- Complete a written application and be interviewed to determine suitability for participation in the program.
- Attend and participate in all district orientation and training sessions.

*All parents or legal guardians of students* interested in participating in the District 7020 Youth Exchange program must be interviewed to determine the student's suitability for participation in the program.

## **6. Training**

District 7020 will provide abuse and harassment prevention training to all Youth Exchange program participants. The District Trainers will conduct the training sessions.

Specifically, District 7020 will

- Adapt the *Abuse and Harassment Prevention Training Manual and Leader's Guide* to incorporate specific district guidelines, information on local customs and cultural issues, and legal requirements
- Develop a training calendar that defines the participants, frequency of training required for each volunteer position, and training methods to be used
- Conduct specialized training sessions for the following Youth Exchange program participants:
  - District governor
  - District Youth Exchange committee members
  - Club Youth Exchange committee members
  - Rotarian counselors
  - Other Rotarians and non-Rotarians who participate in Youth Exchange activities, such as local tours or district events
  - Host families
  - Students (outbound and inbound)
  - Parents and legal guardians of students
- Establish guidelines to ensure that all participants have received the requisite training
- Maintain records of participation to ensure compliance

## **7. Allegation Reporting Guidelines**

District 7020 is committed to protecting the safety and well-being of Youth Exchange students and will not tolerate abuse or harassment. All allegations of abuse or harassment will be taken seriously and must be handled in accordance with the Sexual Abuse and Harassment Allegation Reporting Guidelines.

## **8. Follow-through and Review Guidelines**

District 7020 takes all allegations of abuse or harassment seriously and will ensure that each allegation is investigated thoroughly. The district will cooperate with all law enforcement agencies, child protective services, and legal investigations and will not interfere with other investigations when conducting its own independent reviews.

## **9. Other District 7020 Responsibilities**

- Establish procedures for reporting, investigating, and handling non-criminal offenses or historical cases that law enforcement chooses not to investigate.
- Recommend that all inbound Youth Exchange students maintain insurance at the following levels: travel, medical and dental and AD&D.
- Provide each student with a list of local services in the district (rape and suicide crisis hot lines, alcohol and drug awareness programs for teenagers, relevant law enforcement agencies, community services, private services, etc.).
- Complete a student data request form for all participating Youth Exchange students and return it to RI one month before the exchange begins.
- Provide a 24-hour emergency contact phone number to Youth Exchange students.
- Follow RI guidelines for Youth Exchange Web sites.
- Appoint an independent lawyer, therapist, or counselor to represent any alleged victim in cases of sexual abuse and harassment.
- Report all criminal allegations to RI within 72 hours.
- Report all serious incidents (accidents, crimes, early returns, death) involving Youth Exchange students to RI within 72 hours.
- Evaluate and review this policy and accompanying procedures regularly.

## **10. Club Compliance**

District 7020 will monitor all participating clubs within the district and ensure that they comply with RI guidelines for abuse and harassment prevention. All clubs that wish to apply to the district for certification must provide the district with a copy of the following for review and approval:

- All materials produced in the club to promote and support the Youth Exchange program, including promotional materials and brochures, applications, policies, Web site links, etc.
- List of services in the area (rape and suicide crisis hotlines, alcohol and drug awareness programs for teenagers, relevant law enforcement agencies, community services, private services, etc.)
- Club abuse and harassment prevention training program materials

Participating clubs must agree to carry out the following:

- Complete and return a signed compliance statement that the club is operating its program in accordance with District 7020 and RI policies.

- If not coordinated by the district, conduct criminal background checks and reference checks for all volunteers involved with the program, including, but not limited to, adult residents of host home, counselor, club chair, and all Rotarians and their spouses or partners with direct unsupervised contact with youth. All volunteers must complete and sign the Youth Volunteer Affidavit.
- Develop a comprehensive system for host family selection and screening that includes announced and unannounced home visits and interviews both before and during the placement.
- Conduct follow-up evaluations of both students and host families.
- Follow the Sexual Abuse and Harassment Reporting Guidelines.
- Prohibit direct placement of students outside of the District 7020 Youth Exchange program structure (so-called backdoor exchanges).
- Set procedures for removal of a student from the host family, including establishing criteria for moving a student and locating available back-up temporary housing in advance.
- Develop contingency hosting plans that include prescreened, available back-up families.
- Ensure that all hosting is voluntary. Parents of outbound students and club members must not be required to host students.
- Ensure that long-term exchange students have multiple host families.
- Provide each student with a comprehensive local services list, including information for dentists, doctors, places of worship, counselors, suicide and rape crisis hotlines, etc.
- Ensure that the host counselor for each student is not a member of the student's host family.
- Ensure that the host counselor is trained in responding to any problems or concerns that may arise during the exchange, including the prevention of physical, sexual, and emotional abuse or harassment.
- Provide mandatory training on sexual abuse and harassment prevention for host families, outbound students, inbound students, and their parents or legal guardians.
- Provide the names and contact information of at least three people — both males and females who are not related to each other and do not have close ties to the host families or club counselor — who can help the students with any issues or problems.
- Follow RI guidelines for Youth Exchange Web sites.
- Report all serious incidents (accidents, crimes, early returns, deaths) involving Youth Exchange students to the district immediately.

- Conduct interviews of all applicants and applicants' parents or legal guardians.

### **Statement of Conduct for Working with Youth**

Rotary International is committed to creating and maintaining the safest possible environment for all participants in Rotary activities. It is the duty of all Rotarians, Rotarians' spouses, partners, and other volunteers to safeguard to the best of their ability the welfare of and to prevent the physical, sexual, or emotional abuse of children and young people with whom they come into contact.

*Adopted by the RI Board of Directors, November 2002*

Youth Exchange Section – PD110  
Rotary International  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
E-mail: [youthexchange@rotary.org](mailto:youthexchange@rotary.org)

## **District 7020 Sexual Abuse and Harassment Allegation Reporting Guidelines**

Rotary International is committed to protecting the safety and well-being of all youth program participants and will not tolerate their abuse or harassment. All allegations of abuse or harassment will be taken seriously and must be handled within the following guidelines. **The safety and well-being of young people must always be the first priority.**

### **Definitions**

**Sexual abuse.** Engaging in implicit or explicit sexual acts with a young person or forcing or encouraging a young person to engage in implicit or explicit sexual acts alone or with another person of any age, of the same or opposite sex. This includes non-touching offenses, such as indecent exposure or showing a young person sexual or pornographic material.

**Sexual harassment.** Sexual advances, requests for sexual favors, or verbal or physical conduct of a sexual nature. In some cases, sexual harassment precedes sexual abuse and is used by sexual predators to desensitize or groom their victims.

Some examples of sexual harassment include:

- Sexual epithets, jokes, written or spoken references to sexual conduct, talking about one's sex life in the presence of a young person, and comments about an individual's sexual activity, deficiencies, or prowess
- Verbal abuse of a sexual nature
- Display of sexually suggestive objects, pictures, or drawings
- Sexual leering or whistling, any inappropriate physical contact such as brushing or touching, obscene language or gestures, and suggestive or insulting comments

#### **Who should determine if it is abuse or harassment?**

Upon hearing allegations, adults should not determine whether the alleged conduct constitutes sexual abuse or sexual harassment. Instead, after ensuring the safety of the student, the adult should immediately report all allegations to appropriate child protection or law enforcement authorities. In some countries, this reporting is required by law.

#### **Allegation Reporting Guidelines**

Any adult to whom a Rotary youth program participant reports an allegation of sexual abuse or harassment must follow these reporting guidelines:

##### **1. Receive the report.**

- a. **Listen attentively and stay calm.** Acknowledge that it takes a lot of courage to report abuse or harassment. Be encouraging; do not express shock, horror, or disbelief.
- b. **Assure privacy but not confidentiality.** Explain that you will have to tell someone about the abuse/harassment in order to make it stop and ensure that it doesn't happen to others.
- c. **Get the facts, but don't interrogate.** Ask questions that establish facts: who, what, when, where, and how. Reassure the young person that he or she did the right thing in telling you. Avoid asking "why" questions, which may be interpreted as questioning the young person's motives. Remember that your responsibility is to present the story to the proper authorities.
- d. **Be nonjudgmental and reassure.** Avoid criticizing anything that has happened or anyone who may be involved. It's especially important not to blame or criticize the young person. Emphasize that the situation was not his or her fault and that it was brave and mature to come to you.

**e. Document the allegation.** Make a written record of the conversation, including the date and time, as soon after the report as you can. Try to use the young person's words and record only what he or she told you.

**2. Protect the young person.**

Ensure the safety and well-being of the youth program participant by removing him or her from the situation immediately and preventing all contact with the alleged abuser or harasser. Reassure the youth that this is being done for his or her safety and is not a punishment.

**3. Report the allegations to appropriate authorities — child protection or law enforcement.**

Immediately report all cases of sexual abuse or harassment — first to the appropriate law enforcement authorities for investigation and then to the club and district leadership for follow-through. In District 7020, the appropriate law enforcement office is the police/public safety department.

In most situations, the first Rotary contact is the host club's president, who is responsible for seeking the advice of appropriate agencies and interacting with them. If the allegation involves the conduct of this Rotarian, the district youth program chair or district governor should be the first Rotary contact.

District 7020 will cooperate with police or legal investigations.

District 7002 has researched local, state, and national laws related to sexual abuse and harassment prevention and notes the following legal requirements of which all adult volunteers participating in the program must be aware:

**4. Avoid gossip and blame.**

Don't tell anyone about the report other than those required by the guidelines. Be careful to protect the rights of both the victim and the accused during the investigation.

District 7020 maintains the privacy (as distinct from confidentiality) of any accused person by enforcing the following procedures:

**5. Do not challenge the alleged offender.**

Don't contact the alleged offender. In cases of abuse, interrogation must be left entirely to law enforcement authorities. In cases of non-criminal harassment, the district governor is responsible for follow-through and will contact the alleged offender after the young person has been moved to a safe environment. The district governor may designate this task to a district youth protection officer or district review committee.

## **Follow-through Procedures**

Either the district youth programs chair or district youth protection officer must ensure that the following steps are taken immediately after an abuse allegation is reported.

1. Confirm that the youth program participant has been removed from the situation immediately and has no contact with the alleged abuser or harasser.
2. If law enforcement agencies will not investigate, the district youth protection officer or district review committee should coordinate an independent review of the allegations.
3. Ensure that the student receives immediate support services.
4. Offer the young person an independent, non-Rotarian counselor to represent his or her interests. Ask social services or law enforcement to recommend someone who is not a Rotarian or in any way involved with the youth program.
5. Contact the student's parents or legal guardian.



If the student is away from home, the student and his or her parents should decide whether to stay in country or return home. If the student stays in country, written authorization from the student's parents or legal guardian is required. If the student and the student's parents choose for the student to return home, consult with police before making travel arrangements. If an investigation is pending, the police may not approve of the student leaving the country.

6. Remove alleged abuser or harasser from all contact with any other young participants in Rotary programs and activities while investigations are conducted.
7. Cooperate with the police or legal investigation.
8. Inform the district governor of the allegation. Either the district governor, district youth protection officer, or other district youth program chair must inform RI of the allegation within 72 hours and provide follow-up reports of steps taken and the status of investigations.
9. After the authorities have completed their investigation, the district must follow through to make sure the situation is being addressed. Specifically, District 7020 will conduct an independent and thorough review of any allegations of sexual abuse or harassment.

## **Post allegation Report Considerations**

### **Responding to the needs of the youth program participant**

District 2070 will adopt a cohesive and managed team approach to supporting a young person after an allegation report. The youth program participant is likely to feel embarrassed or confused and may become withdrawn.



After a report of harassment or abuse, students may have mixed feelings about remaining on their exchange. If they do choose to stay, they may or may not want to continue their relationship with their hosting Rotary club. In some cases, a student may wish to remain in country but change to a different host club.

Although club members and host families may have trouble understanding how the student is feeling, the student would find it helpful to know that the club continues to be reassuring and supportive. Club members and host families may feel ambivalent about their roles and unclear about their boundaries. However, they need to do whatever is necessary to reassure the student of their support at all times.

### **Addressing issues within the club**

When addressing an allegation of abuse or harassment, the most important concern is the safety of youth. Club members should not speculate or offer personal opinions that could potentially hinder any police or criminal investigations. Rotarians must not become involved in investigations. Making comments about alleged victims in support of alleged abusers violates both the Statement of Conduct for Working with Youth and Rotary ideals. Comments made against an alleged abuser could lead to a slander or libel claim filed against Rotarians or clubs by the alleged abuser.

### **Statement of Conduct for Working with Youth**

Rotary International is committed to creating and maintaining the safest possible environment for all participants in Rotary activities. It is the duty of all Rotarians, Rotarians' spouses, partners, and other volunteers to safeguard to the best of their ability the welfare of and to prevent the physical, sexual, or emotional abuse of children and young people with whom they come into contact.

*Adopted by the RI Board of Directors, November 2002*

## **District 7020 Youth Volunteer Affidavit**

District 7020 is committed to creating and maintaining the safest possible environment for all participants in Rotary activities. It is the duty of all Rotarians, their spouses and partners, and any other volunteers to safeguard to the best of their ability the welfare of children and young people involved in Rotary programs or activities and prevent physical, sexual, or emotional abuse of young participants.

***This information may be provided to an outside agency that this district has contracted with to conduct background checks.***

### **PERSONAL INFORMATION**

Name:

Address:

City:

State/Province:

Postal Code:

How long at this address? (If fewer than five years, list previous residence[s] on the back of this sheet.)

Government Identification (e.g., Social Security Number):

Date of Birth (dd/mm/yyyy):

### **CONSENT**

I certify that all of the statements in this affidavit, and in any attachments hereto, are true and correct to the best of my knowledge and that I have not withheld any information that would affect this affidavit unfavorably. I understand that District 7020 youth programs will deny a volunteer position to anyone convicted of a crime of violence.

I give my permission to District 7020 to verify information given in this affidavit, including searches of law enforcement and published records (including driving records and criminal background checks) and contact with my former employers and with references provided. I understand that this information will be used, in part, to determine my eligibility for a volunteer position. I also understand that as long as I remain a volunteer, this information may be checked again at any time. I understand that I will have an opportunity to review the criminal history and, if I dispute the record as received, a procedure is available for clarification.

## WAIVER

IN CONSIDERATION of my acceptance and participation in the youth programs, I, to the full extent permitted by law, hereby release and agree to save, hold harmless, and indemnify all members, officers, directors, committee members, and employees of the participating Rotary clubs and districts, and of Rotary International ("Indemnities"), from any or all liability for any loss, property damage, personal injury, or death, including any such liability that may arise out of the negligence of any of the Indemnities or may be suffered or claimed by me as a result of an investigation of my background in connection with this affidavit.

I further agree to conform to the rules, regulations, and policies of Rotary International, the District 7020 youth programs and its affiliates.

**I acknowledge that I have read and understand the above affidavit, consent, and waiver and that I sign this form voluntarily.**

Signature of Applicant:

Please Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

## **ADDITIONAL INFORMATION**

Home Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Are you a member of a Rotary club? Yes No

If yes, indicate club name and year joined:

Position applied for:

Have you held a Rotary youth p

## **EMPLOYMENT**

Current E

Address.

**City:** \_\_\_\_\_ **State/Prov:** \_\_\_\_\_

Phone: \_\_\_\_\_ Position: \_\_\_\_\_

Address:

City:

State/Province:

Postal Code:

Phone:

Position:

Dates of Employment:

Supervisor's Name:

**VOLUNTEER HISTORY WITH YOUTH** (for the past five years; attach additional sheets, if necessary)

Organization:

Address:

City:

State/Province:

Postal Code:

Phone:

Position:

Dates Held:

Director's Name:

Organization:

Address:

City:

State/Province:

Postal Code:

Phone:

Position:

Dates Held:

Director's Name:

**PERSONAL REFERENCES** (may not be relatives; no more than one former or current Rotarian)

1. Name:

Address:

City:

State/Province:

Postal Code:

Phone:

Relationship:

2. Name:

Address:

City:

State/Province:

Postal Code:

Phone:

Relationship:

3. Name:

Address:

City:

State/Province:

Postal Code:

Phone:

Relationship:

**QUALIFICATIONS AND TRAINING**

What relevant qualifications or training do you have for this position? Please describe in full.

## **CRIMINAL HISTORY**

1. Have you ever been charged with, been convicted of, or pled guilty to any crime(s)? Yes No
2. Have you ever been subject to any court order (including civil, family, and criminal courts) involving sexual, physical, or verbal abuse, including but not limited to domestic violence or civil harassment injunction or protective order? Yes No

If yes, please explain. Also indicate dates(s) of incidents(s) and the country and state in which each occurred (attach a separate sheet, if needed).

## **For District Use Only:**

\_\_\_\_\_ References checked by \_\_\_\_\_  
DATE INITIALS

\_\_\_\_\_ References checked by \_\_\_\_\_  
DATE INITIALS

\_\_\_\_\_ References checked by \_\_\_\_\_  
DATE INITIALS