

Rotary District 5470 Manual of Policy and Procedure

Policy Number 4

Incident Management Policy

Approved by the Board of Directors April 19, 2021

Developing and implementing an effective incident management policy demonstrates a district's commitment to accurately manage incident reporting within the district. This document provides a basic framework for a district policy incident reporting.

1. Introduction

Tragedy and crisis can strike at any time. Many types of events could be the cause of a situation that would place a Rotary club officer or board member, an entire club, the District Governor, or other Rotarians in a situation that requires their utmost and immediate attention. Examples of such events include a traffic accident, a violent crime, a youth protection issue, or a simple case of bad judgment; or an incident caused by an action or inaction of a Rotarian or non-Rotarian. While a large human caused or a natural disaster such as a hurricane, earthquake or flood will be addressed through the government's Incident Command System, because Rotarians may be directly affected by them, as soon as information is available that Rotarians were affected and how, this information will be disseminated to members and others with the need to know.

When such a large natural or human caused event occurs, it is important for Rotarians to have a plan in place that can be followed to ensure that the matter is handled with the utmost care for the Rotarian and the Rotarian's family. Key objectives are to ensure that those involved in the incident are kept safe, that communication with those who need to know is completed quickly, professionally, and that any other action that is needed is swiftly taken.

Additionally, in our internet-driven information age, written and video content can be transmitted in a matter of seconds, which makes it important that when an incident erupts that has impacted Rotarians, their club and our Rotary district must respond with a clear message, presented honestly and in a timely manner.

District 5470 and Rotary International have first responders who can help and relieve Rotarians of the worry of facing the media when their attention is needed dealing with the actual crisis. When an incident escalates and the Club is not comfortable addressing it, they are encouraged to shift incident command to the District Governor, who may also involve Rotary International. When an incident escalates to the point where the District Governor becomes the Incident Commander, he/she shall decide the most appropriate course of action. That said, anytime an incident occurs that affects one or more Rotarians, the Club President is to immediately notify the District Governor and seek counsel as needed.

2. Purpose of this Policy

To establish guidelines to ensure the communication of accurate, timely, and consistent information to Rotarians and the public, and to provide for the immediate care and protection of all individuals involved in the situation, as well as their families.

It is always the policy of District 5470 to deliver the highest level of transparency and cooperation consistent with applicable law and government policy.

3. Defining an Incident

An "incident" for the purposes of implementing the Rotary District 5470 Incident Action Policy is an unanticipated, unusual event or occurrence arising out of, or closely related to, the action or inaction of a Rotarian or club, a Rotary project, event, or program that results in, or is likely to result in, physical or psychological harm, serious injury, or death to a participant, or that is or can be detrimental to the public image of Rotary.

Examples include a death or injury stemming either from natural disasters impacting a Rotary project, event, or program (such as fire, flood or earthquake) or human caused (such as accidental or intentional mass casualty event). An "incident" can include suspected illegal activities where the victim or suspected perpetrator is a Rotarian, a Rotary club, or the District; or other event that involves a Rotarian, a Rotary club, or the District that impacts persons or property in a substantial, negative manner.

These events may include youth involved in Rotary functions and activities, such as District Rotary Youth Leadership Awards (RYLA) students, Rotary Youth Exchange (RYE) students, or any youth oriented Rotary projects. Such youth programs may have carefully designed youth protection plans that take precedence over this plan and that are to be followed prior to implementing this plan. In any case, the District Governor must be notified of the incident.

4. Policy and Parameters

1. The District Governor currently in office is the only officer of Rotary International (RI) in the District. As such, he /she is the main contact between the District and RI and between the District and the Club, event, or activity manager of the Rotary activity involved when an incident occurs.

2. The District Governor holds final responsibility for Incident Management in District 5470.

In the absence of the District Governor, or in the case of his or her inability to act, then, the following individuals, in the order listed, shall hold final responsibility:

- a. The District Vice Governor
- b. The District Governor-Elect, or District Governor Nominee

3. The District Governor will annually appoint a Incident Management Advisory Team as part of the District Leadership Team to provide support and guidance as needed.

4. Only the District Governor or his/her designate as set forth above, will activate the Incident Management Advisory Team, or individual members of the team, when required.

5. When an event is originated by a program or project of the District, the District Governor is the Incident Commander for the event.

6. An individual Rotary club's president or designee will initially serve as the Incident Commander for events that originate at the club level. If the event escalates to the District Governor, that person becomes the Incident Commander for the event. The District Governor must be notified for any incident within Rotary District 5470.

7. Depending on the nature and conditions of an incident, once said incident is escalated to the District Governor, the CMT may include any or all of the following as determined by the District Governor.

- a. The District Governor as Chair
- b. District Youth Protection Officer

- c. An attorney at law who is familiar with local law and can give immediate advice as to confidentiality, potential legal action and liability
 - d. The District Public Image Chair
 - e. The District Administration and Management Chair
 - f. An Incident Spokesperson who serves as liaison to the media, who may or may not be the District Public Image Chair
 - g. The Treasurer of the District
8. In addition, others may be asked to serve on the Incident Management Team for a specific incident as required and determined by the District Governor:
- a. The Assistant Governor of the Area of the incident, if the incident reported happens in a distant community where local Rotary District Leadership presence is important
 - b. The chair of the committee responsible for the activity where the incident originated, if applicable Individuals or companies at the request of the District Governor Incident Management Team

5. Education

1. All members of the Incident Management Team shall be familiar with the most recent edition of Rotary International's Media Crisis Handbook, 515-EN-(507) , the Rotary Youth Protection Guide 775-EN-(2), and District 5470's Youth Protection and Abuse and Harassment Prevention Policy.
2. All members of the Media Contact Team shall undergo media relations training available through Rotary International and coordinated by the District Public Image Chair.

6. Initial Response

1. When an incident develops at the Club Level, the Club President shall be considered the Incident Commander until such time as the incident escalates to the point that it affects more than the club. At that point, Incident Command will be shifted to the District Governor.
2. The Club President shall immediately contact and consult with the District Governor or, if the District Governor is absent, unavailable, or unable to take charge, the designated appointee as set forth above.
3. When an event results from a District Program or Project or is escalated to the District Governor or designated appointee shall determine the need to notify and consult with the Incident Management Team and shall decide if the team or certain members of the team should be activated. For example, depending on the situation, the activated team members might consist of the District Governor, Club president, a committee chair, an attorney, the Spokesperson, the youth protection officer and/or the public information chair.
4. The Incident Commander shall immediately provide information, such as social media posts, voicemail messages, emails, or other written documentation, bearing on the crisis to the District Governor, designated appointee or Spokesperson so that they may determine how best to respond. Rotarians are to avoid responding, posting, or sharing the information about the event.
5. The Incident Management Team will cooperate with Law Enforcement and will direct individuals in the gathering of facts.
6. The District Governor will contact Rotary International and the Rotary International Zone Director.
7. The Incident Commander will confirm that Law Enforcement has been contacted if applicable.
8. The District Governor will designate a District Spokesperson. This should be someone who is on top of the issue, communicates well, and is comfortable interacting with the media.

9. As appropriate, the District Governor will direct Club Presidents and Assistant Governors to communicate appropriate and approved information to affected Clubs and/or affected Rotarians and instruct all Club members to refer press inquiries to the District Spokesperson.
10. The Incident Commander may communicate with Assistant Governors, District Leadership Team members, Clubs and/or individual Rotarians as needed.
11. The District Governor will direct the District Spokesperson to prepare a statement, that is in writing, made available to the media, and posted on the District 5470 website, that accurately states the facts, expresses Rotary's position, conveys the appropriate tone (sympathy, apology, commitment, etc.) and develops key messages to help the Spokesperson convey Rotary's position consistently and accurately. The Spokesperson will update the statement as needed with input and advice from the District Governor. NOTE: It is important to determine what may or may not be communicated. Legal rights of those affected must be considered.
12. The District Governor will seek further assistance from Rotary International regarding media inquiries as needed.

7. If the Media Contacts the Club President or an Individual Rotarian

1. The Incident Commander shall ensure there is an organized media response through the Spokesperson that follows the protocols set out above. Do not issue a statement or make any comment to the media other than referring them to the Spokesperson. It is the responsibility of the Spokesperson to communicate the facts and positions of Rotary to the media. Individual Rotarians are encouraged to refer media contacts to the Incident Commander rather than responding themselves.
2. For purposes of the Crisis Management Plan, "media" includes, but is not limited to, the following:
 - a. Traditional print media such as newspapers
 - b. Broadcast media such as television and streaming
 - c. Social media platforms
 - d. Online sources such as bloggers. This may include an untrained citizen journalist who captures an event through photographs, videotapes, or recordings capable of putting online visual, audio and text from the site of an "incident".
3. The District Governor and the Spokesperson will designate a Media Resource Team who will assist the Spokesperson in interaction with the media. This will enable the Spokesperson to divide the workload among several team members in such areas as identified in Section 1.a., above. Each team member may have one area designated to follow and report to the Spokesperson, such as local news, Facebook, Instagram, Twitter, etc., allowing the District Governor and the Spokesperson to maintain control of messages propagating on social media. The contact information for the Spokesperson will be provided to anyone reasonably anticipated to be contacted by the media. That information should be accompanied by instructions to refer all inquiries to the Spokesperson in a cooperative and transparent manner that avoids a response limited to "no comment". The Spokesperson may refer an inquiry to a member of the Media Resource Team.
4. Any Rotarian contacted by the media shall refer the inquiring media representative to the Incident Commander, without comment. Immediately contact the District Governor or designate, even if in doubt of the urgency or importance of the matter. Let those responsible make the decisions as to urgency and importance.
5. If time is needed to confirm or determine the District Governor or Spokesperson's contact information, tell the reporter you or a Rotary representative will call back promptly.
6. Before use, the statement prepared by the Spokesperson should be reviewed by Rotary International Public Image and Press Relations staff.
7. The Incident Commander and/or Spokesperson will be completely honest and truthful, will not say anything he/she is unsure of and will not cover up or make excuses.

8. The Incident Commander and Spokesperson will represent Rotary. When they speak, they ARE Rotary. No personal observations or speculations will be issued.
9. The Incident Commander shall monitor the media's local coverage of the issue for accuracy and tone. If Rotary is misrepresented, let the Spokesperson know. He/she will convey the concern to the District Governor for action, if needed.

8. Media Strategy Checklist

- Alert the Spokesperson
- Gather who, what, where, when and why of the situation
- Confirm the facts
- Clarify and verify technical information
- Prepare a summary statement
- Prepare a fact sheet
- Notify stakeholders (people key to the organization)
- Tell volunteers and clients about changes in services/operations
- Respond to the media
- Keep a log of callers and questions
- Update media as situation develops
- Follow up implications; prevent backlash
- Evaluate and tweak the system

9. What Happens if the Incident is Club specific, but the Ramifications could Impact the District or Rotary in General

1. The Club President should determine whether the incident or dispute goes beyond the Club and cannot be handled using the official procedures for arbitration and mediation as outlined in Article 16 of the Standard Rotary Club Constitution. District Governors do not have the authority to make decisions for the Club or to be a "judge" in Club disputes.
2. The Club President should notify the District Governor immediately if there are wider implications of the incident and name the District Governor as the Incident Commander.
3. The District Governor and the Club President will determine who should be the spokesperson during the incident.
4. The Incident Commander should work with the District Incident Management Team.
5. As appropriate, Club members and/or other Rotarians may be briefed on the event. Any Rotarian briefed on an event will be requested not to talk to the media and to direct all enquiries through the Club spokesperson or the spokesperson of the District Incident Management Team.
6. The District Incident Management Team, through the District Governor, will be available to provide advice and support to the Club President and spokesperson.
7. The Incident Commander will assign a person responsible for gathering all facts and keeping an accurate record of all events and all communications

10. Allegations Against a Rotarian not Related to Rotary

1. When it is brought to the attention of the club that a Rotarian has allegedly committed conduct not related to Rotary which has the potential to bring Rotary into question or disrepute, the Rotary Club President shall immediately contact and consult with the District Governor.

2. As a rule, passing along gossip may be attractive, however, Rotarians are encouraged to follow the Four Way Test

In that regard the following principles apply:

- a. Do not discuss with other members until such time as you have spoken with the individual in question.
- b. Obtain the Rotarian's position with respect to the alleged conduct. Do not discuss the matter with anyone further in the club than is necessary.
- c. If the alleged conduct has already been disseminated amongst members of the club, then the individual may want the opportunity to put his or her side or response to the allegations to the club, although in doing so not to be defamatory about the person who made the original allegations.
- d. Rotary should avoid becoming embroiled in defamation claims for circulating defamatory material. This could be dealt with on an individual by individual basis, as some people may not want the allegations spread further.
- e. If a Rotarian has been charged with a criminal offense, the Incident Commander may ask the member to stand down from any leadership roles until such time as the matter is resolved, but the Rotarian may continue as a member since anyone accused is innocent until proven guilty.
- f. If the Rotarian pleads guilty or is convicted of the offense, the club board may decide to have them removed from the club altogether. In exercising this power, the club board may take into regard the nature of the offense and the impact to the reputation of the Rotary club and Rotary more widely.

3. If a Rotarian, not the Incident Commander is contacted by the media, the Rotarian will refer the media representative to the Incident Commander.

11. What to Do When Speaking to the Media

• Find out:

Who is calling, what media outlet or organization they represent, their direct contact details, what they want to know, when is their deadline.

- Focus on the key messages given by the District Crisis Management Team.
- Limit the key communication to 2 or 3 statements.
- Be completely honest and sure of what is said.
- Release as much information as you can in a statement rather than making "off the cuff statements".
- If something should not be reported, don't say it!

- There is no such thing as "off the record" when speaking to a member of the media.
- Acknowledge any concerns.
- Explain the event is under investigation and doing what is being done to address the situation.
- Remain pleasant and as accommodating as possible.
- Be organized before you communicate with the media.
- Speak in short, simple sentences. Each statement has the potential to be a headline tomorrow.
- When possible, strengthen the main message with a short personal and relevant story.
- Emphasize Rotary is cooperating fully if there is an enquiry.

- Demonstrate positive voice tone and body language. Show emotions such as sympathy, concern, understanding or regret-whatever emotion is appropriate.
- At the end, thank the journalist and offer to be available for any follow up.
- Monitor the media coverage of the crisis. If facts are misrepresented, inform the media through a polite call or letter to the Editor.

12. What not to Do When Speaking to the Media

- Never respond with "No comment". If you can't answer a particular question then explain why. For example: Sorry, but that matter is now part of an official investigation.
- Never refuse to speak to the Press
- Don't ignore or delay the media-it can contribute to negative speculation.
- Don't panic.
- Don't make any "off the record" comments. The interview is not over until the journalist leaves or hangs up.
- Don't speculate or give opinions-stick to the key facts.
- Avoid mentioning or responding to rumors.
- Avoid Rotary jargon and acronyms.
- Don't repeat the negative part of a question. Change to a positive.

Example

Question: Did the Club fail to provide adequate checks on the host parents of the exchange student?

Response: The safety of our exchange students is of the highest priority.

- Never cover up or make excuses.
- Avoid coming across as defensive, nervous or hostile

13. What Happens at the End of an Incident

- Additional follow up matters will be directed and monitored by the District Governor.
- Within one month of the completion of the crisis, the District Governor will meet with the District Incident Management Committee to evaluate the effectiveness of the management of the incident and to make changes to any procedures in the Incident Management Policy that prove necessary.

14. Updating the Incident Management Policy

It is important to review the incident management policy regularly. The policy shall be updated as follows:

- Annually prior to the start of the new Rotary year by June 15, of the current Rotary year.
- Following any changes to leadership or other youth protection policies.
- As a result of recommendations from a debriefing following a resolved incident, an incident simulation, or a narrowly avoided incident.
- Remember that nothing said to the media is "off the record."

15. A Final Important Word

Remember: Clubs, District committees and individuals are NOT to handle any incident alone! Don't do it! Ask for help. District 5470 and Rotary International have trained responders who can relieve you of the worry of facing the media when your attention is needed dealing with the actual incident The District

Governor shall decide the most appropriate course of action. Contact your District Governor as soon as you think a possible incident is developing or has developed.

16. After the Fact

Once the incident has ended, the District Governor and the Incident Management Team should assess the handling of the incident and recommend changes in procedure to improve future incident management.

With the start of each new Rotary year on July 1st, the District Operations Manager will add the appropriate names and contact information for the District Incident Management Team as directed by the District Governor.

17. Definitions

Incident Commander: The incident commander is the person responsible for all aspects of an emergency response; including quickly developing incident objectives, managing all incident operations, application of resources as well as responsibility for all persons involved.

Public Information Spokesperson:

The public information officer, a member of the command staff, is responsible for the formulation and release of information about the incident to the news media and other appropriate agencies and organizations.

- a. Obtain briefing from the incident commander.
- b. Contacts the jurisdictional agency to coordinate public Information activities.
- c. Establishes a public information center, as necessary.
- d. Arrange for necessary workspace, materials, telephones and staffing.
- e. Prepare initial information summary as soon as possible after arrival.
- f. Observe constraints on the release of information Imposed by the Incident Commander.
- g. Obtain approval for release from the Incident Commander.
- h. Completes media notification reporting that an incident has occurred, providing information regarding the nature of the incident.
- i. Release news to media and post information as appropriate.
- j. Attend meetings to update information releases.
- k. Provide escort service to the media and VIP's.
- l. Respond to special request for information.

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