



# **Rotary District 5360**

**Rotary Friendship Exchange (RFE)**

**ADMINISTRATIVE ROLES, POLICIES AND PROCEDURES**

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# INTRODUCTION

## ADMINISTRATIVE ROLES, POLICIES AND PROCEDURES

The **Rotary Friendship Exchange Handbook**, published by Rotary International, hereinafter referred to as the "Handbook" [http://www.rotary.org/RIdocuments/en\\_pdf/rfe\\_handbook\\_en.pdf](http://www.rotary.org/RIdocuments/en_pdf/rfe_handbook_en.pdf) is the prime reference document for the Rotary Friendship Exchange program. The Rotary District 5360 Rotary Friendship Exchange Administrative Roles, Policies and Procedures (RPP) are meant to supplement and complement the handbook in the conduct of the RFE program by Rotary District 5360 (D5360)

This document has been produced to inform and guide D5360 RFE committee members and to assist in ensuring good and consistent practices in administering the RFE program. D5360 Rotarians who are involved from time to time in the RFE program, especially hosts, host clubs, and outbound RFE participants should be aware of those sections of the RPP that pertain to their particular involvement in the program.

The document is in two parts and has a section of appendices.

- SECTION ONE - General Roles and Responsibilities of members of the D5360 RFE Committee
- SECTION TWO - Policies adopted to provide consistency in the conduct of the RFE program
- APPENDICES - Includes forms and other document templates that may be utilized by the RFE Committee and D5360 Rotary clubs in conducting the program

This document will be updated as and whenever necessary to reflect any changes adopted in conducting the RFE program whether initiated by Rotary International or D5360 through its RFE Committee. The most current version of the document as approved by the D5360 Board of Directors, will be posted on the D5360 website, <http://www.clubrunner.ca/portal/SitePages/SitePage.aspx?did=5369&pid=38175>



# SECTION ONE

## General Roles and Responsibilities of Members of the District 5360 Friendship Exchange Committee

### 1. COMMITTEE

#### Role

Coordinate the RFE program in D5360.

#### Responsibilities

- Organize reciprocal “team exchanges” for periods of up to one month.
- Facilitate reciprocal “visitor exchanges” for periods from three days to one week.

### 2. CHAIRPERSON

#### Role

Lead, manage and administer the activities of the RFE Committee.

#### Responsibilities

- Chair RFE Committee meetings.
- Ensure the RFE program of Rotary International is promoted within D5360.
- Manage matters requiring decisions by the RFE Committee.
- Secure suitable international exchange partners.
- Promote the participation of D5360 in the RFE program internationally.
- Negotiate general conditions of exchange with Partner Districts.
- Ensure guidelines for exchanges are established and followed.
- Ensure guidelines for selecting exchange participants are followed.
- Keep the District Governor and the District Governor Elect informed so that they may be included in meeting inbound Rotarian RFE visitors.



- Prepare and submit an annual report to the D5360 Foundation Chairperson detailing the major activities and accomplishments of the D5360 RFE Committee over the previous year.

### **3. SECRETARY**

#### **Role**

Manage and administer the records of the RFE Committee.

#### **Responsibilities**

- Distribute notice of meetings of the RFE Committee.
- In consultation with the Chairperson and the other members of the RFE Committee prepare agenda, including reports relevant to matters on the agenda.
- Minute the meetings including specific actions to be carried out by the members of the RFE Committee.
- Keep a list of possible changes to this document as they are proposed from time to time.
- Every two years, issue an update of this document to reflect any changes approved by the RFE Committee.
- Maintain a record of D5360 alumni.

### **4. PUBLIC RELATIONS COORDINATOR**

#### **Role**

Manage the plan to promote the RFE program in D5360.

#### **Responsibilities (all committee members are expected to fulfill these responsibilities)**

- Provide articles for the district newsletter.
- Provide articles for club bulletins.
- Visit clubs and give presentations on the exchange program.
- Prepare presentations for delivery at the annual district conference.
- Liaise with the inbound and outbound coordinators in order to publicize exchanges.

### **5. INBOUND COORDINATOR**

#### **Role**



Act as an intermediary between the D5360 host clubs and the incoming RFE team from the Partner District.

### **Responsibilities**

- Assist the chairperson in securing suitable exchange partners.
- Liaise with the coordinator from the incoming district.
- Liaise with the contacts at the host clubs in D5360.
- Plan the detailed itinerary in conjunction with the host clubs' coordinators and the exchange partner outgoing coordinator.
- Ensure that club hosts are aware of their responsibilities.
- Liaise with the Public Relations Coordinator to ensure that the exchange is publicized

## **6. OUTBOUND COORDINATOR**

### **Role**

Act as an intermediary between the outgoing D5360 RFE Team and the host district.

### **Responsibilities**

- Assist the chairperson in securing suitable exchange partners.
- Liaise with the coordinator of the host district.
- Administer all arrangements for outbound exchange participants.
- Lead the selection of the Team Members.
- Facilitate a meeting amongst Team Members to review all expectations.
- Guide the process of selecting the Team Leader.
- Ensure that the Team Leader understands his or her responsibilities.
- Ensure that the Team Members submit personal data forms and photographs and that these profiles are consolidated and forwarded to the host district.
- Liaise with the Public Relations Coordinator to ensure that the exchange is publicized.
- Ensure that a closing report is submitted to the RFE Committee by the outbound exchange team after the completion of the exchange. (See Appendix E for format)

## **SECTION TWO**

### **Policies adopted to provide consistency in the operation of the D5360 RFE program**



## 1. LOCATING INTERNATIONAL FRIENDSHIP EXCHANGE PARTNERS

- 1.1 In targeting partners, the preferences of D5360 Rotarians will be solicited and considered.
- 1.2 Before accepting proposals from other Rotary districts it must be assessed whether or not there is likely to be sufficient interest by D5360 Rotarians in an exchange.

## 2. EXCHANGE PARTICIPANTS

### GENERAL

- 2.1 The opportunity to participate in a team exchange is available to any D5360 Rotarian in good standing as either an individual or with his/her spouse or partner. Note that the number of participants may be limited by the resources of the host Exchange Partner District.
- 2.2 Applications to participate in a team exchange must be submitted on the prescribed form (see Appendix A).
- 2.3 Applicants are encouraged to submit their applications as soon as possible since in the event of a ranking tie for the last available position, the application with the earlier postmark will be successful.
- 2.4 In general the D5360 RFE Committee will organize two inbound and two outbound exchanges each year. This may be increased subject to interest by D5360 Rotarians and the availability of host clubs, Partner Districts and resources to manage the additional exchanges.
- 2.5 Applicants who have participated in an exchange that ended within 24 months of the start of another exchange are not eligible unless the exchange is undersubscribed.

### UNDERSUBSCRIBED

- 2.6 If insufficient qualified D5360 Rotarians apply to fill a team, subject to concurrence of the host Exchange Partner District, unfilled team places may be offered to others. Some examples are: a Rotarian or Rotary couple from neighbouring District, the partner of a deceased Rotarian, a travelling companion for a male or female Rotarian.
- 2.7 The host Exchange Partner District may specify a minimum number of participants. If this number of participants is not reached, the exchange will be cancelled.

### OVERSUBSCRIBED

- 2.8 Applicants will be assessed using the following criteria in descending order of importance:
  - To what extent is and has the applicant been involved in Rotary at the Club level?
  - To what extent has the applicant supported the RFE Committee by hosting visitors and by filling the role of coordinator for their home club?



- To what extent has the applicant supported the RFE Committee by taking on other roles such as Outbound Team Leader or Treasurer, driving the visiting Team from city to city, hosting a significant event such as a Team BBQ etc.
  - To what extent is and has the applicant been involved in Rotary at the District and International level?
  - Has the applicant been previously denied because of an over-subscription? If so, when did this occur?
  - Has the applicant participated in previous outbound exchanges? If so, in what year did this occur and what country was visited?
  - Has the applicant hosted other non-RFE events such as a GSE team member, Youth Exchange Student or provided Home Hospitality for a district conference?
- 2.9 Those who are not selected will be placed on a “standby” list. In the event of a cancellation they will be invited to participate starting with the highest ranked applicant.

#### **TEAM LEADER**

- 2.10 The Team Leader, who must be a Rotarian, will be selected jointly with a representative of the D5360 RFE Committee and the RFE team participants. This person should have experience as a leader, and understand team dynamics and conflict resolution processes.
- 2.11 The Team Leader is expected to fulfill the following roles:
- Act as the spokesperson for the Exchange Team during the international visit.
  - Act as a link between the D5360 Outbound Coordinator and the Exchange Team.
  - Act as a link between the D5360 Exchange Team and the host district Incoming Coordinator.
  - Arrange for a member of the Exchange Team to prepare a closing report on the completion of the exchange.
  - Arrange for a member of the Exchange Team to manage the pooled funds and costs of the Team.
  - Strives to achieve consensus when decisions are required but takes the responsibility for making decisions when consensus cannot be achieved.
  - Confronts team members when their behaviours are counterproductive to the interests of the team as a whole.
  - Acts as a mediator when there are internal or external conflicts.

#### **VISITOR EXCHANGES**

- 2.12 Visitor Exchanges: The RFE committee has a preference for Team Exchanges; however, approaches from other Rotary districts to participate in Visitor Exchanges will be considered on merit.
- 2.13 Visitor Exchanges: Individual Rotarians, groups of Rotarians, and Rotary clubs are encouraged to initiate Visitor exchanges by making initial contact with Rotarians or Rotary clubs in another country. The RFE Committee may endorse any such exchange as a Visitor Exchange provided the committee is satisfied it meets all requirements of the RFE program as set out in the handbook and the RPP.



Alternatively, individual Rotarians, groups of Rotarians or Rotary clubs may apply to the RFE Committee proposing that the committee seek a visitor exchange on their behalf. The RFE Committee will endeavour to secure an Exchange Partner for any applicant if it is satisfied that all requirements of the RFE program as set out in the handbook and RPP are met.

### **3. WORKING WITH A PARTNER DISTRICT**

- 3.1 Whenever practicable, a set of General Conditions of Exchange must be agreed upon with the Partner District before applications are called for team places.
- 3.2 Whenever practicable, agreement shall be reached with Partner Districts that any exchange may include individual Rotarians. In the case of a Team Exchange intended primarily for Rotary couples, limits may be put on team places and/or total team membership.
- 3.3 Where cultural and/or language issues arise during the planning phase of an exchange, the General Conditions of Exchange may provide that a person with appropriate skills, accompanied by a partner if necessary, may accompany a team to provide assistance during the visit to the host district. Arrangements to secure such a person may be made either by the host district, or by the visiting district. In such situations host Rotary clubs are asked to extend the same hospitality to such person as a team member.
- 3.4 The question of what expenses will be borne by the visiting Exchange Team must be a matter for agreement and inclusion in the General Conditions of Exchange.
- 3.5 Given the large area of D5360 and the subsequent long travel distances, in the majority of cases, it is a requirement that transport is contracted and that inbound teams meet all associated costs. The RFE Committee will endeavour to provide a Rotarian driver as far as this is practicable.
- 3.6 Team Members are expected to join the team at an agreed to rendezvous place in the partner district and to stay with the team for the duration of the exchange.
- 3.7 Team Members are expected to participate in all group activities arranged by the host clubs, except in cases of illness or other extenuating circumstances.
- 3.8 In general, Inbound and Outbound Teams will be limited to a minimum of eight and a maximum of 12 participants. Larger or smaller Teams will be considered at the discretion of the D5360 RFE Committee in agreement with the Partner District.

### **4. POST TEAM SELECTION ACTIVITIES**

- 4.1 At the earliest opportunity after Team Members are advised of their selection, personal information including electronic photograph in jpeg format or equivalent must be sent to the Outbound Coordinator, who in turn will forward this information



as soon as practicable to the host district RFE Chairperson or his/her delegate. The format must be as per Appendix B.

- 4.2 The Outbound Coordinator must communicate various matters pertaining to the exchange to team members in order that they are aware of their responsibilities and commitments, and to enable team members to make relevant decisions. Meetings should preferably be face-to-face but may be by electronic communication if this is logistically better. Matters to consider must include but is not limited to the following:
- Selection of a Team Leader.
  - Review of the General Conditions of Exchange.
  - Review of the itinerary.
  - Meeting location in or convenient to the host district.
  - Selection by the Team Leader of certain responsibilities to other team members.
  - Budget estimate and proposed matter of dealing with costs.
  - Sharing of travel plans.
  - Cultural and/or language issues.
  - Emergency contact in the host district.
  - Team “uniforms” and/or dress, name badges, team information booklet or brochure, district or other pins for giveaways, club banners, gifts for hosts.
  - Travel insurance which must be acquired and paid for by the individual Team Members.

## 5. HOSTING A TEAM EXCHANGE

- 5.1 When determining itineraries and host clubs for visits by inbound teams the RFE Committee must consider:
- The time of year and duration of each inbound visit.
  - Providing opportunities for as many clubs as possible to participate in the program, by varying itineraries from exchange to exchange.
- 5.2 An itinerary framework or outline must be compiled by the Inbound Coordinator which must include at least anticipated arrival and departure dates for each host club and contact information for each host club. (See Appendices C and D)
- 5.3 Detailed local planning of the itinerary must be carried out by each host club but all details need not be included in the itinerary framework. The Inbound Coordinator should have an overview of the accumulated host club itineraries to ensure that there is no duplication and that it is balanced with a variety of formal and informal events while taking into account the age and interests of the guests.
- 5.4 The itinerary framework should be provided to the Exchange Partner district RFE Chairperson and Incoming Coordinator as soon as practicable.
- 5.5 Emergency contact for use by families of inbound team members must be provided to members of the inbound team, either as part of the itinerary framework or as a separate document specifically for that purpose.



- 5.6 Appropriate transport must be arranged for inbound teams taking into account team size, the nature of the itinerary, and budget consideration.
- 5.7 When it is decided that a self-drive vehicle will be utilized every effort must be made to secure a Rotarian volunteer driver. In such cases the driver may be accompanied by his/her partner, and host clubs must be requested to provide accommodation.

## 6. MISCELLANEOUS

- 6.1 Deposit: Every application must be accompanied by a nonrefundable deposit cheque, the amount of which is determined from time to time by the RFE Committee. Currently the deposit is \$300 per applicant.
- 6.2 If the applicant is accepted the cheque, less \$50, is applied to the communal fund of the Exchange Team.
- 6.3 If the application is not approved or if the exchange is cancelled, the cheque is returned in its entirety or destroyed as per the preference of the applicant.
- 6.4 Should an applicant subsequent to being accepted, withdraw from the Exchange Team, the deposit is forfeited.
- 6.5 The applicant may appeal this forfeiture. Under unusual circumstances the RFE Committee may at its sole discretion refund the deposit, for example, in the event of the death of a close family member such as a parent, sibling or a child or a significant illness of the applicant or spouse/partner.

## APPENDICIES

- A. Team Application Form
- B. Team Member data Form
- C. Example of a Club-to-Club Itinerary to be used by Inbound Coordinator
- D. Example of a detailed Club Itinerary to be used by Club Coordinator
- E. Closing Report/Exchange Evaluation Form