



## **Rotary District 5390 Risk Management Policy**

Update January 1, 2012

Policies and procedures to follow when working with any “at risk” group which includes, but may not be limited to youth, the elderly and handicapped.

## **ROTARY INTERNATIONAL DISTRICT 5390**

### **RISK MANAGEMENT PLAN**

(First Draft Approved by the District #5390 Board of Directors 4/11/06)  
(Amended 7/23/07) (Amended 06/07/09) (Amended 01/01/2012)

The Rotary International Board of Directors in November 2002 adopted this statement of conduct for working with youth as follows:

“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.”

It is the policy of Rotary International that each district shall put in place guidelines for the prevention of abuse and harassment which apply to all Rotary programs, activities and planned events. In 2006 the Board of Directors of District 5390 approved this policy for the prevention of abuse and harassment which includes guidelines for the reporting of allegations of such abuse or harassment. All Rotary clubs in District #5390 are to follow these guidelines in connection with programs, activities and planned events.

In 2009, Rotary International mandated that each district or multidistrict program shall also have a written policy related to emergencies and a committee to oversee and implement specific policies and procedures for dealing with such crises. The Board of Directors subsequently approved the enclosed Crisis Management plan.

Club bylaws may be created in accordance to these guidelines. If a club wishes to produce its own policies or procedures, it must be in compliance with RI and District guidelines, and a copy should be provided to the District Governor for approval. Such approval must be obtained in order for a club to participate in any Rotary program involving children or any other vulnerable persons as defined in this document.

This policy may be amended or its contents changed at any time by a majority vote of the Board of Directors of Rotary District #5390. The District Risk Management Officer and all Club Risk Management Officers shall be notified of any such changes or amendments.

## Table of Contents:

|   |           |
|---|-----------|
| Crisis Management Plan For Youth Exchange and<br>Other Rotary Youth Programs..... | pgs. 4-6  |
| Policy for Prevention of Abuse and Harassment.....                                | pgs. 7-14 |
| Introduction .....  | p. 7      |
| Scope .....   | p. 7      |
| Definitions .....   | p. 8      |
| Abuse   |           |
| Harassment  |           |
| Sexual harassment   |           |
| Protected person  |           |
| Prohibited person   |           |
| Policy Statement .....  | p. 10     |
| District Commitments .....  | p. 10     |
| Club Commitments.....   | p. 12     |
| Screening of Rotarians and Volunteers .....                                       | p. 12     |
| Appendix A.....   | p. 15     |
| Rotary International's Guidelines for Youth Exchange Emergencies                  |           |
| Appendix B .....  | p. 18     |
| Reporting Guidelines for Allegations of Harassment or Abuse                       |           |
| Appendix C .....  | p. 24     |
| Requirements of Clubs   |           |
| Appendix D .....  | p. 27     |
| District Risk Management Officer – job description                                |           |
| District Officer Contact Information .....  | p. 28     |

## **Rotary International District 5390**

### **Crisis Management For Youth Exchange and other Rotary Youth Programs**

Should an emergency situation arise involving a minor in a Rotary-sponsored program such as Youth Exchange or RYLA the following steps must be followed:

#### **1. Safety and medical help for all involved young people**

- a. One person from the club sponsoring the Rotary event needs to take charge of the situation immediately. That person should be the Club Risk Management Officer. If he/she is not readily available, then the committee chair for that event or the club president must take control of the situation. The designated person in charge must do the following:

1. Notification of proper law enforcement officials
2. Immediate response to nearest medical help/hospital
3. Pass on all necessary information regarding the young people to the hospital and other authorities.
4. Notify parents. If Youth Exchange is involved, notification could involve both "host parents" and the young person's own parents in his/her own country. If a death is involved, consult with proper law enforcement officials regarding notification. Be aware that if transporting a body internationally will be necessary, then notification will include a Consulate or the State Department.

Note: It is important that each club's Risk Management Officer has all the information regarding youth activities, those participating, parents' contact information, etc. available to him/her at all times. In the event Youth Exchange is involved in the emergency, then the Club YE Chair should immediately assist with such information as needed.

- b. Notify the District Risk Management Officer and, if pertinent, the District Youth Exchange Chair and any involved Rotary YE counselors. Then notify the District Governors of any involved districts.

#### **2. Protection of young people from the media**

- a. One person designated by the District 5390 Risk Management Officer or the District Governor will provide information to the media.
  1. This person must be familiar with the laws regarding the releasing of names of minors. (ie: Rotary personnel are not to disclose names or medical conditions of minors to any third party.)
  2. This person should also be familiar enough with the workings of Youth

Exchange and other Rotary youth programs to be able to answer any questions regarding such programs.

3. All other Rotarians should defer comments to the appointed spokesperson.
- b. Don't gossip! All Rotarians should be alert to the dangers involved regarding misinformation and minors.

### **3. Other notifications**

- a. If injury prevents school attendance, notify all involved schools and/or school districts. If death is involved, also encourage them to prepare grief counseling for students and friends.
- b. If YE is involved, ask the District Youth Exchange Officer to notify, or assist in the notification of all other involved "host families".
  1. Such notification should include international partners (ie: District YE Chairs) of the involved students' countries.
  2. If the incident occurs during the time of student outbound selection, notification may involve more students and their families.
- c. Notify Rotary International both orally and in writing immediately. Keep notes, including participants in, and the time and date of the conversation!

Rotary International  
 One Rotary Center  
 1560 Sherman Ave.  
 Evanston, IL 60201

Phone: 847-866-3000

If Youth Exchange is involved: Office of Youth Exchange Coordinator  
 Phone: 847-866-3421  
 Also notify C.S.I.E.T.

- d. Notify the District Governor.

### **4. If death is involved**

- a. Obtain from the parents and/or legal guardians clear instruction regarding burial, cremation or the return of the body. Confirm such instructions in writing. Such instructions might include a request for an autopsy. Obtain a copy

of the police report and reclaim the deceased's personal possessions. Obtain the death certificate. Locate the passport if necessary.

- b. Be prepared, if appropriate, to bring parents from where ever they are located to your location.
- c. Ask about, and if recommended, plan a memorial service. Consideration must given to the religion of the deceased. There may be a need for a private memorial service for family and a public service for friends and/or other students.
- d. Refer to the Rotary International *Guidelines for Youth Exchange Emergencies* (Appendix A) for details on any of the above requirements.

## **5. Continuing care**

- a. Arrangements should be made for continued care for involved students and families.
  - 1. Such care may involve housing for persons from a different state or country.
  - 2. Such care might involve assistance in providing counseling.
- b. Eventually, a complete report should be sent to your District Governor. Copies should be sent to Rotary International (address above) and, if Youth Exchange is involved, to the student's home district and Rotary club.

Finally, should an emergency ever occur while away from the host area, any local Rotary club may be contacted for assistance and/or guidance.

## **Rotary District #5390 Policy For Prevention of Abuse and Harassment**

### **Introduction**

District #5390 is committed to creating and maintaining the safest possible environment for all participants in Rotary activities. Rotarians, their families, and non-Rotarian volunteers are expected to use their best efforts to safeguard the welfare and prevent the physical, sexual or emotional abuse or harassment of every young or vulnerable person with whom they come into contact in connection with any Rotary program, activity or event.

Rotary Clubs place great emphasis on their work with people in the community, including children, young people, and other vulnerable persons through Rotary's many programs including Rotary Youth Leadership Awards ("RYLA"), Interact and Rotaract clubs, mentoring programs, and Rotary International Youth Exchange ("Youth Exchange"). This volunteer effort is vital to the quality of life in our communities and to the good reputation of Rotary and Rotarians. For this exemplary work to continue, it is important that our Rotary Clubs protect the interests of everyone involved, and create and maintain a safe and respectful environment for all participants in Rotary programs, activities or events. All allegations of abuse or harassment will be taken seriously and must be handled in accordance with these guidelines. This policy will also assist in ensuring that an adult against whom an allegation is made is treated fairly, since an allegation of abuse or harassment does not necessarily mean that abuse or harassment actually occurred. *Nonetheless, whenever an allegation is made, the safety and well-being of youth or vulnerable persons should always be the first priority.*

### **Scope**

This Policy applies directly to all Rotarians and volunteers in District programs, activities, or events who come into solitary or unsupervised contact with youth or vulnerable persons, including host families and Club counselors in Youth Exchange programs and leaders in RYLA, Interact, or Rotaract clubs. This Policy also applies to all adults over the age of 18 years who are ordinarily resident in homes in which an Exchange student is residing.

Furthermore, each club that belongs to the District must follow the "Requirements to Clubs" that are attached as Schedule "B" to this Policy. This includes adopting this Policy, either directly into its bylaws or by incorporating it into the club's own written policy for the prevention of abuse and harassment.



## Definitions

In this Policy and in the Guidelines:

“*Abuse*” means physical, emotional or sexual abuse;

“Physical abuse” means the intentional use of force to the body which results in injury. It may be a single incident or a series or pattern of incidents;

“Emotional abuse” means chronic exposure to alcohol or drug abuse, verbal attacks on a person’s sense of self, repeated rejection or humiliation. It also means exposure to domestic abuse, isolation or existing in an environment of fear and/or anxiety; and

“Sexual abuse” means improper and unwanted exposure to sexual contact, activity or behavior. This may be engaging in implicit or explicit sexual acts with a protected person, or forcing or encouraging a protected person to engage in implicit or explicit sexual acts alone or with another person of any age of the same sex or of the opposite sex. It includes, but is not limited to, any sexual touching, intercourse or exploitation, non-touching offenses, indecent exposure, or exposure to sexual or pornographic material.

“*Harassment*” means any conduct by an individual that is directed at, and offensive to, another person or persons and which the individual knew, or ought reasonably to have known, would cause offense or harm. It includes any objectionable act, comment or display that belittles, demeans or causes personal humiliation or embarrassment or any act of intimidation or threat.

Harassment may include, but is not limited to:

- Conduct that erodes the dignity of the victim, particularly based on the victim's color, race, national origin, ethnic origin, age, sex, gender, physical characteristics, sexual orientation, or physical or mental disability;
- Unwelcome and demeaning remarks, jokes, and innuendos about race, sex, religion, age, national origin, marital status, color or disability;
- Use, display, or distribution of racist, pornographic, derogatory, or other offensive written material;
- Practical jokes based on race, sex, or other discriminatory grounds;
- Verbal abuse or threats;
- Inappropriate or offensive gestures;
- \* Voyeurism or inappropriate photography or recording; and
- \* Misuse of the internet or the telephone.

“*Sexual harassment*” means any intentional or unintentional behavior of a sexual nature that would make a reasonable person feel offended, humiliated or intimidated.

Sexual harassment can take many different forms and may include physical contact, verbal comments, jokes, propositions, and the display of offensive material or other behavior that creates a sexually hostile environment.

Sexual harassment may include, but is not limited to:

- Uninvited or unwanted touching;
- Uninvited or unwanted kisses or embraces;
- Crude or sexist jokes or comments;
- Sex-based insults, taunts, teasing or name-calling;
- Making sexually suggestive or obscene comments or gestures;
- Staring or leering at a person or at parts of their body;
- Making promises or threats in return for sexual favors;
- Making requests for sex or sexual favors;
- Repeated invitations to go out after prior refusal;
- Unwelcome sexual flirtations, advances or propositions;
- Persistent or unwelcome questions or insinuations or comments about a person's private or sex life;
- Offensive phone calls, letters or internet communication;
- Voyeurism or inappropriate use of photography or recording; and
- Sexual assault.

“*Volunteer*” means any adult involved with Rotary programs involving protected persons who has direct, unsupervised interactions with those protected persons. This includes, but is not limited to, Rotarians and non-Rotarians, their spouses and other family members.

“*Protected person*” means a youth or other vulnerable person, and

“*Youth*” means any person less than 18 years of age involved in a Rotary program (such as Youth Exchange, RYLA, Interact, Rotaract, or any other community or youth service project), activity or event and to whom Rotary may have a duty of care, and specifically includes children; and

“*Vulnerable person*” means anyone who is elderly, physically or mentally disabled or infirm, or suffering from any sort of disability that might render him or her in need of protection or care, who is involved in a Rotary program, activity or event and to whom Rotary may have a duty of care.

“*Prohibited person*” means anyone who

- 1.) Has been convicted of an offence which resulted in harm to an individual, including assault, sexual assault, sexual interference with a minor or failure to provide the necessities of life;
- 2.) Has been convicted of any offence which, in the opinion of the District

- Risk Management Officer, suggests an unacceptable risk of harm to a person in the care of that individual; or
- 3.) Is subject to a court order prohibiting that person from being in contact with any other individual.

### **Policy Statement**

It is the responsibility of every Rotarian and every volunteer in Rotary programs to safeguard the welfare of every person with whom they come into contact during Rotary activities. Special attention is to be given to protected persons. This includes the prevention of abuse and harassment.

Rotarians and volunteers should always:

- Treat protected persons with respect;
- Provide a model of good and appropriate behavior;
- Respect protected persons' right to privacy;
- Be aware that behavior can be misinterpreted even when well intentioned; and
- Challenge unacceptable behavior.

### **District Commitments**

In accordance with its moral, ethical and legal obligations, insofar as possible District #5390:

- 1.) Will ensure that protected persons who are involved in District programs, activities, or events are protected from abuse, harassment, or sexual harassment;
- 2.) Will ensure that District programs for protected persons are provided in a safe and caring environment;
- 3.) Will prevent contact between protected persons and individuals who are either prohibited by law from working with protected persons, or who are considered by the District to be inappropriate individuals to be working with protected persons;
- 4.) Will NOT permit a prohibited person to participate in any program related to protected persons;
- 5.) Will NOT permit any person to host or become a counselor or a mentor to a youth exchange student, whether as a home-stay parent or as an adult living in the same home in which the youth exchange student will live, without first determining the suitability of the person through the District's Youth Exchange screening process;
- 6.) Will designate each year a District Risk Management Officer whose duties will include maintaining and raising awareness of this Policy and advising the District Governor with respect to matters of harassment or abuse;
- 7.) Will encourage and facilitate the timely reporting of incidents where protected persons are at risk of harm;
- 8.) Will ensure prompt notification of allegations of abuse or harassment made by protected persons where allegations involve Rotarians or persons involved with

- Rotary programs, activities or events; and
- 9.) Will report any allegations of abuse of protected persons in compliance with state legislation and as outlined in the Guidelines.

To this end the following procedures are adopted by District #5390:

1. The Rotary District Youth Exchange Program will be incorporated under the laws of the State of Montana, USA.
2. District #5390 and its members will be covered for general liability insurance by the policy of Rotary International purchased as a part of the annual dues.
3. A District Risk Management Officer will be appointed yearly to oversee the workings of this policy. (See job description Appendix "C")
4. District #5390 will provide abuse and harassment training to all Youth Exchange and other vulnerable sector program participants who will come into direct, unsupervised contact with protected persons. It will also maintain records of participation in training to assure compliance that all required to be trained have participated.
  - a.) The responsibility for providing these training sessions will rest with the chair of the program (eg: Youth Exchange, RYLA, Rotaract. Interact, et. al.) and the District Risk Management Officer (RMO).
  - b.) The calendar for training, the frequency of such, the descriptions of who is to participate in each session, and the content of the Program is the responsibility of the District Risk Management Officer.
  - c.) Who is to be trained will be determined by the District Risk Management Officers working in conjunction with the Club Risk Management Officers. Participants in the training may include the District Governor, District Youth Exchange Committee members, Rotarian counselors, RYLA counselors, etc.
5. District #5390 is committed to protecting the safety and well being of all protected persons and will not tolerate their abuse or harassment. All allegations of abuse or harassment will be taken seriously and will be handled in accordance with the Guidelines defined in Schedule "A".
6. District #5390 takes all allegations of abuse and harassment seriously and will investigate each allegation thoroughly in accordance with the Guidelines defined in Schedule "A". The District will cooperate with all law enforcement, child protection services, and legal investigations, and will only conduct its own independent investigations such that it does not interfere with other investigations.
7. Other responsibilities of District #5390, carried out through the District Risk Management Officer and committee chair (Youth Exchange, RYLA, etc.) include:
  - a.) Have a procedure for reporting, investigating, and proper handling of non-criminal offences or historic cases that law enforcement will not investigate.
  - b.) Ensure that all inbound Youth Exchange students maintain adequate insurance.
  - c.) Provide each Youth exchange and other protected person with a list of the local services in the District. (rape and suicide crisis hotline, alcohol and drug awareness programs, proper law enforcement agencies, community services, private services, etc.)
  - d.) Have a completed student data request form for all participating Youth Exchange students returned to RI one month before the beginning of the

- exchange.
- e.) Maintain and provide to Youth Exchange and other protected persons in District youth activities a “district hotline”
  - f.) Will follow RI guidelines for Youth Exchange Websites
  - g.) Will appoint an independent lawyer, therapist, or counselor to represent any alleged victim in cases of sexual abuse and harassment.
  - h.) Will report all criminal allegations to RI within 72 hours.
  - i.) Will report all serious incidents (accidents, crimes, early returns, death) involving Youth Exchange students and other protected persons involved in Rotary District #5390 programs to RI within 72 hours.
  - j.) Will evaluate and review these policies and procedures yearly.

### **Club Commitments:**

District #5390 has adopted the Rotary District #5390 Policy for the Prevention of Abuse and Harassment (the “District Policy” above) and the Rotary District 5390 Reporting Guidelines for Allegations of Abuse and Harassment (the “District Guidelines” Schedule “A”) in an effort to enhance existing protections at both a club and District level for youth and vulnerable persons who are involved in Rotary programs, activities or events.

The District *requires* that each club adopt the District 5390 Policy (or a formally approved alternative) and apply the District Guidelines and club commitments, described in Schedule “B”, in order to participate in Youth Exchange or other Rotary District #5390 programs for protected persons.

Specific recommendations to the clubs as to written policies, guidelines on dealing with disclosure or discovery of abuse or harassment, function of the club protection officer, and screening of volunteers and participants is spelled out on Schedule “B” that follows.

### **Screening of Rotarians and Volunteers**

It is the policy of District #5390 that:

- 1.) In connection with the Youth Exchange, all Club counselors, mentors, and host family members over 18 must provide the host club with a completed Criminal Record Check for working with youth, which also includes Vulnerable Sector Screening. For background check procedures, contact the Club or District Risk Management Officer. Cost of such screening is the responsibility of the clubs.
- 2.) For all other District 5390 programs and activities involving protected persons such as RYLA and Interact, Rotarians and volunteers who will be alone and/or unsupervised with protected persons will provide the Club and/or District Chair responsible for the program, event or activity a successfully completed Criminal Background Check. For background check procedures, contact the Club or District Risk Management Officer. Anyone failing to pass such a background

check may challenge the result of that check, but must do so himself/herself by direct contact with the screening company at his or her own expense. Cost of such screening is the responsibility of the sponsoring club or committee.

### 3.) Student Selection and Screening:

- a. All students interested in participating in District #5390 Youth Exchange or other youth related programs must complete a written application and be interviewed for suitability. They must attend and participate in all district orientation and training sessions.
- b. All parents or legal guardians of students interested in participating in District #5390 Youth Exchange or other youth related programs, must be interviewed to determine the youth's suitability for participation on the program.

### 4.) Volunteer Selection and Screening:

**a. All volunteers** interested in participating in District #5390 Youth Exchange or other programs involving youth or other protected persons must:

1. Complete a *Youth Volunteer Affidavit* form and authorize the district to conduct a criminal background check. The volunteer must pass the background check. Anyone failing to pass a criminal background check may challenge the result of that check, but must do so himself/herself by direct contact with the screening company at his or her own expense.
2. Undergo personal interviews.
3. Provide a list of references.
4. Understand and comply with RI and district guidelines for the Youth Exchange or other program.
5. Meet RI and district eligibility requirements for working with students. (RI requires that any volunteer who has admitted to, been convicted of, or otherwise found to have engaged in sexual abuse or harassment be prohibited 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, then, for the safety of the youth participants and the protection of the accused, additional safeguards must be put in place to assure the protection of any youth with whom the individual may have future contact. A person later cleared of charges may apply to be reinstated to participate in youth programs. Reinstatement is not a right, and no guarantee is made that he or she will be reinstated to his or her former position.)

#### **b. Host families**

1. Host families will meet the selection and screening requirements listed above for all volunteers. In addition they will:
2. Complete a written application.
3. Participate in a comprehensive interview that determines their suitability for hosting students. This should include:

- a. Demonstrated commitment to the safety and security of students.
  - b. Motivation to hosting a student is consistent with Rotary ideals of international understanding and cultural exchange.
  - c. Financial ability to provide adequate accommodations (room and board) for the student
  - d. Aptitude for providing appropriate supervision and parental responsibility that ensures the student's well being.
4. Agree to home visits, both announced and unannounced, both prior to and during the placement. Home visits must be conducted annually, even for repeat host families.
  5. All adult residents of the host family must meet the selection and screening guidelines. This includes adult children of the host family, and other members of the extended family that reside in the home either on a full- or part-time basis.

**c. Rotarian counselors**

1. Must meet all the criteria for all Volunteers listed above (inc. a successfully completed background check.) In addition they must:
2. Not be a member of the student's host family.
3. Be trained in responding to any problems or concerns which may arise during the exchange, which may include instances of physical, sexual, or emotional abuse or harassment.

## Appendix A

## Rotary International Youth Exchange

### Guidelines for Youth Exchange Emergencies

Although they are rare, unfortunate emergency situations do occasionally arise during Youth Exchange activities. Preparation for any possibility is an essential part of a Youth Exchange program. How the exchangee's family and the media perceive that the emergency was handled will have a direct impact on the program. The following guidelines outline how to prepare in advance for a possible emergency, the individuals to contact should an emergency occur, and the steps to follow during an emergency. Each Rotary club hosting a Youth Exchange student should have a small committee to help share the work in the event of a tragedy. Suggested committee members are the host parents, the club Youth Exchange chairperson, the club counselor, and the club president. **Each district or multidistrict program should have a written policy related to emergencies and a committee to oversee and implement specific policies and procedures.**

Tips for emergency preparedness:

- The District Youth Exchange Officer shall identify a qualified interpreter or interpreters for each inward and/or outward bound exchange student and provide his/her contact information to the District RM Chair and the District Governor. The interpreter should be competent in both English and the language of the student he/she represents. If the interpreter is another YE student or a Rotex, there is the additional advantage that the student is knowledgeable about the Rotary YE program.
- The club counselor should keep the student's passport and airline ticket readily available at all times. Store these items in a safe place so that they can be accessed 24 hours a day if necessary.
- The District Youth Exchange Chairperson should have copies of the airline ticket and passport should the student be traveling or in case the student's documents are not accessible through the club counselor.
- The District Youth Exchange Chairperson should obtain consent from the student's parents or legal guardians to reissue a student's passport in the case it is lost, stolen, or inaccessible at time of departure.
- The District Youth Exchange Chairperson should share with the sponsoring Youth Exchange Officer the student's itinerary and know who will meet the student at the airport upon arrival.
- The sponsoring club should outline who (e.g., club, district, student's parents, a combination of sources) will pay for the student to return to finish the exchange after being evacuated in the case of political or civil unrest.
- The Rotarian counselor and current host family should know details regarding all of the exchangee's travel plans and should ascertain that these travel plans have been approved by the natural parents/legal guardians of the exchangee, especially if the exchangee is traveling to another city or country during the exchange.
- The exchangee's parents should issue a written authorization letter (or powers of attorney) naming the host Rotarian counselor, host families, and another Rotarian of the host/receiving club (preferably the host club president), any of whom is to act for the parent in the event of injury or death. This is very important because most government departments and local authorities require it. Some districts have the parents/legal guardians sign a number of parental consent forms separate from the application form to ensure that each host family and counselor has a copy of the form.

The letter mentioned above should also authorize the incurring of:



- Funeral expenses (cost of claiming body, embalming, casket, compliance with legal and government fees, and transportation of casket/body, cremation cost, etc.) to be reimbursed from the insurance policy;
- Expenses of authorized persons (Rotarian counselor and/or host parent) to act on behalf of parent (transportation and hotel charges for travel to place of accident, etc.), to be reimbursed from the insurance policy.

The handling of expenses is important as not every host club can afford to incur such immediate expenses. The ability of the club or district to handle immediate costs can prevent a tragic situation from becoming worse and increasing the agony and anguish of the student's parents.

The host Rotarian is committed to treat the exchangee as though he/she is his or her own child and will do everything a natural parent would do. However, if a host Rotarian has to spend a substantial amount of money for immediate needs, other Rotarians may be discouraged from becoming host parents and counselors in the future.

It is therefore recommended that either the host Rotary club or the host Rotary district establish an emergency fund to cover immediate expenses in the event of a tragedy. The insurance money received will reimburse this fund. Many hosting districts require the students to have an emergency fund to assist in the event of an emergency.

When a tragic event occurs, things need to be done quickly. Tasks should be assigned to the various members of the club/district emergency committee. The following people need to be informed immediately:

Parents/Legal guardians. (In case of death, obtain clear instruction concerning burial, cremation or return of body. Also ask about memorial service. Consideration must be given to the religion of the deceased.)

Host family, club counselor, and District Youth Exchange Chairperson.

Host District Governor and the Governor of the sponsoring District.

Host Rotary club, for assistance and guidance.

Insurance company (and remember to follow up).

Embassy Officer, to obtain his/her advice.

Procedures to follow when the death of an exchangee occurs:

Ascertain that the deceased is the exchangee.

Contact all of the above individuals.

Check with local police for local regulations and obtain a copy of the police report. Reclaim the deceased's possessions, especially the passport.

Check with the local hospital and mortuary for the claiming of the body and regarding an autopsy. Obtain the death certificate.

Contact a local undertaker and embalmer. Ensure that the embalmer possesses an internationally recognized practice license so that the embalmed body may cross national borders. (This is to prevent the spread of disease.) Obtain the embalmer's certificate. Order a suitable casket and arrange transportation to exchangee's home country or arrange for burial or cremation, according to the parents' wishes.

Obtain the "sealing certificate." For the casket to cross national borders, the inside must be metal-lined and sealed. Sealing must be officially witnessed, to prevent smuggling. In order for a sealed casket to leave the country, an export permit is required. For the sealed casket to enter the exchangee's home country, an import permit is required. An established undertaker should be able to deal with these matters. The embassy can assist in obtaining the two permits.

Appoint a reputable air-transport agent to airlift the casket to the exchangee's home country. This is to ensure that all connecting flights are correctly scheduled without risk of the casket being accidentally off-loaded at an intermediate airport. The arrival flight details should be correctly

passed to the deceased's parents so that they can make arrangements to receive the casket. Give copies of the death certificate, embalming certificate, casket sealing certificate, import and export permits, and passport to the transport company and must accompany the casket on the airplane.

Hold a memorial service for the exchangee.

Remember to write a complete report to your District Governor. Send copies to Rotary International and to the exchangee's home district and Rotary club.

If an accident occurs away from the host area, you may want to contact a local Rotary club for assistance and guidance.

## Appendix B

**ROTARY INTERNATIONAL DISTRICT 5390****REPORTING GUIDELINES FOR ALLEGATIONS OF ABUSE OR HARASSMENT**

|  | <u>Page</u> |
|--|-------------|
| <b>Introduction</b>  | 18          |
| <b>Scope</b>   | 18          |
| <b>Definitions</b>   | 18          |
| <b>Procedures for Adult Receiving Allegation</b>           | 19          |
| <b>Procedures in Response to Allegation</b>                | 20          |
| <b>Understanding the Needs of the Complainant</b>          | 21          |
| <b>Appropriate Behavior for Others Aware of Allegation</b> | 22          |
| <b>Sanctions</b>   | 22          |

**Introduction**

These reporting guidelines should be read and used in conjunction with the Rotary International District #5390 Policy for the Prevention of Abuse and Harassment (the “Policy”). In particular, please refer to the Policy for definition of terms used in these Guidelines.

The Guidelines were initially developed in connection with the Youth Exchange Program, but have been adapted to be of assistance with respect to all those defined as “protected persons” in the Policy.

**Scope**

Unless specifically adopted by a club, these guidelines are intended to be used in connection with allegations arising in the context of District programs, activities or events. If adopted for use in connection with club programs, activities or events, references to the District Governor, District RMO and District Committee Chair should be applied, respectively, to the Club President, Club RMO and Club Committee Chair or responsible Director (depending on a club’s organization).

**Definitions**

In addition to the definitions already set out in the Policy, in these Guidelines:

“*Complainant*” means the protected person making an allegation of abuse and/or harassment, either directly or through another person.

“*Respondent*” means the adult against whom a complainant has made an allegation of abuse and/or harassment.

### **Procedures for Adult Receiving Allegation**

Any adult to whom a complainant reports an incident of sexual abuse or harassment should comply with the following guidelines.

#### ***1. Receive Report from Complainant***

- a.) **Listen attentively and stay calm.** Acknowledge that it takes a lot of courage to report abuse. It is appropriate to listen and 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 to make it stop and to ensure that it does not happen to other protected persons.
- c.) **Get the facts, but don’t interrogate.** Ask the complainant questions that establish what was done and who did it. Reassure the complainant that he or she did the right thing in telling you. Avoid asking ‘why’ questions. Remember your responsibility is to present the complainant’s story to the proper authorities.
- d.) **Be non-judgmental and reassure the complainant.** Do not be critical of anything that has happened or anyone who may be involved. It is especially important not to blame or criticize the complainant. Assure the complainant that the situation was not his or her fault and that he or she was brave and mature to come to you.
- e.) **Record.** Keep a written record of the conversation with the complainant as soon after the report as you can, including the date and time of the conversation. Use the complainant’s words, and record only what has been told to you.

#### ***2. Protect the Complainant***

Ensure the safety and well-being of the complainant. If you or the complainant have any concerns regarding his or her safety, immediately remove the complainant from the situation and from all contact with respondent. Reassure the complainant that this is for his or her own safety and is not a punishment.

#### ***3. Report to District Committee Chair and District Protection Officer***

Immediately upon receiving the complaint, report the allegation to the District Committee Chair responsible for the program, activity or event in which the alleged incident or incidents occurred and to the District Risk Management Officer. They will keep the District Governor advised and will review the

complaint in order to ascertain whether it needs to be referred to an appropriate law enforcement authority or whether it is a matter to be handled using internal policies and guidelines.

#### ***4. Ensure Privacy is Respected***

Avoid gossip and blame. Do not tell anyone about the allegation other than those whom these Guidelines require to be told. Except as required by these Guidelines, all information with respect to the allegation must be kept strictly private and confidential to protect the rights of both the complainant and the respondent.

#### ***5. Follow Up***

Once the case has been reported to the District Risk Management Officer and the District Committee Chair, your role is complete. You may wish to follow up to ensure that steps are being taken to address the situation. You must not however contact the respondent about the allegation.

### **Procedures in Response to Allegation**

The District Committee Chair who receives the report of an allegation has the primary responsibility for responding to an allegation and should comply with the following guidelines. The District Committee Chair should work with the advice and support of the District Risk Management Officer, and both should ensure that the District Governor is fully advised of the steps being taken to deal with the allegation. Where appropriate, the District Governor may wish to become directly involved in some or all of the steps set out below.

For Youth Exchange, the District Youth Exchange Chair should keep the complainant's Rotarian counselor fully advised of all steps being taken. Following receipt of a report of an allegation of abuse and/or harassment, the following steps must be taken promptly:

1. Confirm that the complainant has been removed from the situation immediately and from all contact with respondent.
2. The District Governor, District Committee Chair and the District RMO shall, with the assistance of legal counsel if appropriate, immediately determine if the report should be communicated to the appropriate law enforcement agency. If the decision is made to so report the allegation, the responsibility for investigation of the complaint lies with the law enforcement agency, and all District personnel should cooperate with any police investigation. The District RMO should ask the police to keep him or her advised of the progress of the investigation.
3. If a decision is made that the appropriate course of action is to investigate the allegations internally, or if the police decline to investigate, complete an

investigation plan in collaboration with the District Risk Management Officer. Depending on the nature of the complaint, its severity, and the facts surrounding the case, one or more of the following options can be discussed with the complainant (remember that if a youth is involved he or she has the right to have an adult present at all times and to be represented by an adult):

- pursuing an informal resolution of the complaint;
  - proceeding with a formal investigation;
  - taking advantage of counseling, mediation, and other resources; and/or
  - exploring other possible avenues of recourse including the police, appropriate provincial agencies or the Human Rights Commission.
4. Ensure the complainant receives immediate support services.
  5. Offer the complainant an independent, non-Rotarian counselor to represent his or her interests. Ask the appropriate social service or law enforcement agency to recommend someone who is not a Rotarian nor in any way involved with the program, activity or event in question.
  6. For Youth Exchange, determine with the complainant's Rotarian counselor whether his or her parents should be contacted and whether the complainant should have the option of either staying in country or returning home. For any other situation involving a youth, decide these issues in consultation with an adult (other than the respondent) who is responsible for the complainant.
  7. While investigations are being conducted, remove the respondent from any contact in Rotary programs, activities or events with all protected persons including the complainant.
  8. For Youth Exchange, the complainant's Rotarian counselor must inform the District Youth Exchange Chair and District Governor of the allegation. Either the District Governor or the District Youth Exchange Chair must inform Rotary International of the allegation within 72 hours, and provide follow-up reports of steps taken, outcome of all investigations and resulting actions.
  9. Complete as quickly as possible the investigation in accordance with the investigation plan and provide a report on the findings made to the respondent, the complainant and the District Governor.

### **Understanding the Needs of the Complainant**

There will need to be a cohesive and managed team approach to supporting the complainant after an allegation is reported. The complainant is likely to feel embarrassed,

confused, and may become withdrawn.

For Youth Exchange, the complainant may in addition appear to be avoiding members of the host family or hosting Rotary club. After a report of harassment or abuse, complainants may or may not want to remain on their exchange. If they do, they may or may not want to continue their relationship with their hosting club depending on the circumstances. In some cases, a complainant may wish to remain in country, but change to a different host club if one is available.

It may be difficult for club members, volunteers and host families who become aware of the complaint to understand how the complainant is feeling, but it would be helpful for the complainant to know that the club remains a support for them. Club members, volunteers and host families may experience ambiguity toward their roles and may feel unclear regarding their boundaries. However they need to do whatever is necessary to reassure the complainant of their support at all times.

### **Appropriate Behavior for Others Aware of Allegation**

When addressing an allegation of abuse or harassment, the most important concern is the safety of a complainant. Club members who become aware of the allegation should not speculate, make editorial comments, or offer personal opinions that could potentially hinder any investigation. Club members who become aware of the allegation should be cautioned about speculating or commenting on the matter during the investigation.

Comments made about a complainant in support of a respondent or about a respondent in support of a complainant are inconsistent with our Rotary ideals. Furthermore, adverse comments made against either a complainant or a respondent could lead to a defamation claim filed against Rotarians or clubs by the person about whom those comments are made.

### **Sanctions**

A club must terminate the membership of any Rotarian who admits to, is convicted of, or is otherwise found to have engaged in sexual or physical abuse or sexual harassment. A non-Rotarian who admits to, is convicted of, or is otherwise found to have engaged in sexual or physical abuse or sexual harassment must be prohibited from working with youth in a Rotary context. A club may not grant membership to a person who is known to have engaged in sexual or physical abuse or sexual harassment. (Upon obtaining information that a club has knowingly failed to terminate the membership of such a Rotarian, the Board of Directors of Rotary International will take steps to have the Rotarian's membership terminated, and will take action to terminate as well the club's charter for failure to comply.)

If an investigation into a claim of sexual or physical abuse or sexual harassment is inconclusive, then, for the safety of participants who fall into the class of "protected persons" and the protection of the accused, additional safeguards must be put into place to assure the protection of any other protected persons with whom the individual may have future contact. If there are subsequent claims of sexual abuse or harassment, the adult shall be permanently prohibited from working with protected persons in a Rotary context. Regardless of criminal or civil guilt, the continued presence of the adult could be

detrimental to the reputation of the organization and could be harmful to other protected persons. (It can also benefit the adult by preventing additional accusations from other persons.) A person who is accused, but later cleared of charges, may apply to be reinstated to participate in any and all Rotary programs. Reinstatement is not a right, and no guarantee is to be made that he or she will be reinstated to any former roles or responsibilities.



## Appendix C

### ROTARY INTERNATIONAL District 5390

#### REQUIREMENTS OF CLUBS REGARDING PREVENTION OF ABUSE AND HARASSMENT

##### Introduction

District #5390 has adopted the Rotary District #5390 Policy for the Prevention of Abuse and Harassment (the “District Policy”) and the Rotary District 5390 Reporting Guidelines for Allegations of Abuse and Harassment (the “District Guidelines”) in an effort to enhance existing protections at both a club and District level for youth and vulnerable persons who are involved in Rotary programs, activities or events. Please refer to the District Policy for definition of terms used here such as “abuse”, “harassment” and “protected person”.

The District requires that the clubs adopt the District Policy modified to apply to the club, (or approved alternate), and apply the District Guidelines in Schedule “A” in order to participate in Rotary sponsored programs that deal with youth and protected persons.

In all instances, it should be the action of the club to assure that any youth or protected person be afforded a safe and healthy environment. If there is any doubt, as Rotarians, we err on the side of protection of youth and vulnerable persons.

##### Requirements for Rotary Clubs:

- 1.) Each club must have a written policy on the prevention of abuse and harassment.  
This may be an adoption of the District policy noted above, or individualized for the club. In either case, it must also include the delineated details following, and be approved by the District Risk Management Officer.
- 2.) Each club must issue guidelines on how to deal with the disclosure or discovery of abuse or harassment.  
It is recommended that they adopt or adapt the District Guidelines (Appendix A)
- 3.) Each club will designate a Club Risk Management Officer responsible for the Protection of youth and/or vulnerable persons.
  - a. This person, along with the club president, will yearly complete and return a signed compliance statement that the club is operating their programs for protected persons in compliance with District #5390 and RI policy.
  - b. The CRMO will assure that all volunteers complete and sign the *Youth Volunteer Affidavit*.
  - c. The Club RMO and/or Youth Exchange chair will provide the District RMO:
    1. Copies of all materials produced in the club to promote and support the

Youth Exchange program, including, but not limited to promotional materials and brochures, applications, policies, website links, etc.

2. A list of services in area (rape and suicide crisis hotline, alcohol and drug awareness programs, proper law enforcement agencies, community services, private services, etc.)
  3. Details of the club abuse and harassment training program.
- d. The Club Risk Management Officer will conduct criminal background checks for all adults who will be alone and/or unsupervised with the exchange student. That includes, but is not limited to, adult full-time residents of the host home, and the Rotary counselor. Details on such checks are available from the Club or District RMO.
  - e. The Club RMO is responsible for dealing with allegations or disclosures and should designate at least one alternate to do so when he or she is not available. Members and volunteers should know how to contact the Club RMO or the alternate quickly.
  - f. The Club Risk Management Officer is also responsible for raising awareness and training all members of the club for the procedures they should follow when concerned with matters of harassment or abuse.
  - g. If a club cannot find a volunteer to serve as its Risk Management Officer, it may ask the District Risk Management Officer to serve as its CRMO. Or it may incorporate the duties of the RMO into the duties of the Club President or President-elect.
4. Each Club will establish a process where protected persons can talk in confidence and safely with an independent person.  
With respect to the Youth Exchange, this person would be the student's Rotarian counselor. Counselors should not be members of the host family, and should be trained in responding to problems that may arise during an exchange or other youth program. This is to include prevention of physical, sexual and emotional abuse and harassment. Three backup volunteers' names and contact information should be provided to students in the event of the counselor's absence.
  5. Each club will prepare Rotarians and volunteers to work effectively with all protected persons.  
Training on abuse and harassment prevention is to be provided for all volunteers, counselors, host families, inbound and outbound students, and their parents or legal guardians. A copy of the club's policy to prevent abuse or harassment and instructions on what to do if abuse or harassment is discovered or suspected should be provided to each Rotarian and volunteer at each such program, activity or event.
  6. Each club will establish a process of screening of volunteers, students and host families.  
This should follow the directives in the District #5390 policy noted above for "screening".

7. Each club will have policies for reporting all suspected cases of abuse or harassment.

These should be reported to the District Risk Management Officer immediately who will inform the District Governor. Reports to proper law enforcement agencies are covered in Schedule "A".

8. All Rotarians should always let the Four Way Test be the guide for their ethical and moral behavior.

The Four Way Test:

1. Is it the **Truth**?
2. Is it **Fair** to all concerned?
3. Will it build **Goodwill** and **Better Friendships**?
4. Will it be **Beneficial** to all concerned?

## Appendix D

**District 5390 Risk Management Officer  
Job Description**

The District Risk Management Officer shall be a Rotarian in good standing in District #5390 and a professional with training in abuse and harassment prevention and youth protection issues.

This appointment is yearly renewable for three years.

**Duties:**

1. Serves as the chair of the District 5390 Risk Management committee.
2. Maintains, supervises, and increases awareness of the District abuse and harassment policies.
3. Assures that clubs that wish to participate in, and committees that supervise, Rotary sponsored activities involving protected persons and youth such as Youth Exchange, RYLA, Rotaract and Interact, have their own policies in place that address abuse and harassment.
4. Assures that clubs and committees that participate in Rotary sponsored activities involving protected persons and youth follow the District #5390 policies for abuse and harassment and the reporting guidelines for such allegations.
5. Assures that clubs and committees that participate in Rotary sponsored activities involving protected persons and youth follow the District #5390 policy for screening of program volunteers, hosts and participants.
6. Reports to the District Governor any information regarding situations of possible abuse or harassment.
7. Assures that cases of abuse and harassment are reported to the proper law enforcement agency, in compliance with District policy.
8. Supervises District training in the prevention and awareness of abuse and harassment.
9. Maintains records of club and District compliance with these District policies and guidelines.
10. Maintains a list of local services for crisis situations as supplied by participating clubs.
11. Supervises the District "hot line" for crisis situations involving protected persons.
12. May, with the agreement of the District Governor, assist as club protection officer for those small clubs where situations of size prohibit the confidentiality of this position.

Contact information for the 2012-13 Rotary Year:

District 5390 Governor, 2012-13:

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