INTRODUCTION Rotary Districts that are continuing with traditional Group Study Exchange partnerships - <u>Forms</u> – - <u>Best Practices</u> -Effective: March 26, 2014

Issued: March 26, 2014

Districts are now free to establish their own Group Study Exchange policies, in coordination with their partnering district.

Attached are forms and best practices that have been developed by participating Districts. It is advisable for Districts to follow these policies for the purpose of creating uniformity in the new and revised Group Study Exchange program.

However, two partnering Districts are free to make arrangements, and revise forms, to meet the needs and desires of both districts. In such a case, it is advisable to have all agreed upon arrangements signed by the District Governor and the GSE Chair.

You may be tempted to pass the attached forms/best practices, and the data base of participating districts, on to Districts that are not participating in this project. If non-participating Districts have access to the data base, forms and practices, then the list of participants will not grow. If the list doesn't grow, it will become obsolete in one to two years. Please encourage those districts that you have contact with, who are continuing GSE, to participate in the data base. Have them contact Peg Sennett at pegsennett@hotmail.com with their district information and we will forward to them the date base and all forms and best practices.

The following forms are included:

PARTNERING APPLICATION – Self explanatory. First step in arranging a GSE partnership

PARTNERING <u>AGREEMENT</u> – Identifies the details of the GSE partnership. Contains *Required Conditions* and *Negotiable Conditions*. While the listed Required Conditions will meet the needs of most partnerships; there may be situations where both districts agree on a revision to the Required Conditions.

TEAM LEADER APPLICATION

TEAM MEMBER APPLICATION

TEAM LEADER/MEMBER COMMITMENTS

TEAM LEADER/MEMBER BIOGRAPHICAL INFORMATION

CERTIFICATION OF MEDICAL INSURANCE

MEDICAL CERTIFICATION

END OF EXCHANGE EVALUATION

HOST DISTRICT EVALUATION

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The following best practices are included:

OPTIONS FOR FUNDING OF GSE TEAM AIR FARES – Paying for air fares is the most expensive part of the GSE. Many Districts no longer do GSE because of this expense. However, several Districts are using creative ways to pay for air fares, they are included in the policy statement.

FUNDING GSE WITH DISTRICT DESIGNATED FUNDS – Per The Rotary Foundation, there is one aspect of the Group Study Exchange Program that cannot be revised – lineal descendants of Rotarians cannot be a member of the GSE team when District Designated Funds (DDF) are used to benefit GSE team members. This policy specifically pertains to airline tickets since this is a big expense of the GSE program.

Note: This best practice is a directive from TRF and not a policy developed by the new GSE Leadership Team. The Leadership Team is passing this Rotary Foundation information on to each participating district. It is your district's decision on how you will follow this directive.

BOOKING AIRLINE TICKETS – This policy is offered by Bailey Travel. However, each District can book their airline tickets through a travel agency of their choice. But because some Districts do not have a travel agency contact or may not know of a travel agency experienced in international flight arrangements, this option is offered.

DATA BASE – A list of participating Districts, including their contact information and district GSE information, is sent to you as a separate file.

This packet of GSE information is intended to help Districts continue with GSE for the purpose of building international understanding and good will.

Your GSE Leadership Team: D1460 Denmark, GSE Chair Peter Rastrup, <u>peter@rastrup.dk</u>

D1890 Germany, GSE Chair Wolfgang Janus, wjanus@fahrenkrug-eutin.com

D4855 Argentina, GSE Chair Mauro Casal, maurocasal@hotmail.com

D6580 Indiana USA, DG 2013/14, GSE Chair, Tim Lee, timlee0910@aol.com

D7390 Pennsylvania USA, GSE Chair Outbound Tom Houf, houftp@gmail.com

D7390 Pennsylvania USA, GSE Chair Inbound Peg Sennett (GSE information Administrator), pegsennett@hotmail.com

D9670 Australia, GSE Chair Shari Tanzer, <u>shari.milsom@7mail.com</u>.

We would like to hear from you. Is the data base helpful to you in arranging a GSE partnership? Are the forms and best practices useful? Do you have any suggestions for change or revision?

ROTARY GROUP STUDY EXCHANGE PROGRAM PARTNERING APPLICATION

Dis	Host District #	Location	Country
w	Partnering District #	Location	Country
Both exe	changes will occur during the Rota	ry year:	_
Or			
 Exchange 	es will cover two consecutive Rota	ary years of ar	nd

This Partnering Agreement applies to the new model for GSE, effective July 01, 2013, and replaces the previous GSE Program that was administered by The Rotary Foundation.

The Group Study Exchange (GSE) Program provides the opportunity for two Rotary districts in different countries to partner for the purpose of exchanging teams composed of professionals and a Rotarian team leader. Team members live in local Rotarians' homes wherever possible and follow a carefully prepared itinerary throughout the host district. Team members observe their host country's professional, commercial, and industrial operations, as well as systems of government and education, health, welfare and social institutions.

Districts that arrange a GSE Pairing prior to the Governors' January Training in San Diego, have the benefit of meeting and exchanging ideas at the Governors' Training

The District has appointed a district GSE Committee to administer the exchange including promoting the program, identifying host families, creating a written itinerary, and orienting the Outbound Team.

Name of GSE Chair:

Email Address: Phone #:

Sponsoring District Goals

As a Sponsoring District, what are your goals for the Inbound GSE Team?

As a Sponsoring District, what goals would you like the Partnering District to provide for your Outbound GSE Team?

We understand and agree to the terms stated in this Application. We have also reviewed the conditions set forth on the District Agreement form that will be completed by the District GSE Chair.

PRINT NAME OF CURRENT DISTRICT ROTARY FOUNDATION CHAIR	PRINT NAME OF DISTRICT GO	VERNOR IN OFFICE DURING THE GSE TOUR
SIGNATURE OF CURRENT DISTRICT ROTARY FOUNDATION CHAIR	SIGNATURE OF DISTRICT GOV	ERNOR IN OFFICE DURING THIS GSE TOUR
DATE	DATE	
In a timely manner submit this signed form to the Partnering	District	Policy date: July 2013

RAIAT	Host District #	Location	Country
ww		Location	
Both ex	changes will occur during the Rotary	/ year:	
)r			
Exchang	es will cover two consecutive Rotar	y years of: and	
ates for th	e <u>Inbound</u> GSE Team's tour in our D	istrict:	
rrival		Departure	
Da	y Date	Day	Date
istrict Con	ference dates:		
ates for th	e <u>Outbound</u> GSE Team's tour in the	partnering District:	
	e <u>Outbound</u> GSE Team's tour in the		
			Date

Transportation to/from the airport in the Host District for both the Inbound and Outbound Teams will be arranged and paid for by the Host District. Arrangements consist of: ______

The Group Study Exchange (GSE) Program provides the opportunity for two Rotary districts in different countries to partner for the purpose of exchanging teams composed of professionals and a Rotarian team leader. Team members live in local Rotarians' homes wherever possible and follow a carefully prepared itinerary throughout the host district. Team members observe their host country's professional, commercial, and industrial operations; systems of government; and education, health, welfare and social institutions.

Important

- 1. This Partnering Agreement applies to the new model for GSE, effective July 01, 2013, and replaces the previous GSE Program that was administered by The Rotary Foundation.
- 2. Under this new GSE model there are a minimal number of <u>Required Conditions</u>, listed below.
- 3. All other conditions are <u>Negotiable Conditions</u>, as listed below. The GSE Chairs for both districts discuss, and in coordination with their respective District Governors (DGs in office during the time of the GSE), resolve and agree upon the Negotiable Conditions.

Required Conditions:

The following Required Conditions cover the basics for a successful GSE; these Conditions are not negotiable and should be followed by all Districts participating in the Group Study Exchange Program.

- 1. All expenses related to the Outbound Team's preparation, including arrangements for the team's airfares, and all expenses associated with hosting the Inbound Team, including transportation within this District, are the responsibility of this Host District.
- 2. The DG serving at the time of the exchange has the responsibility to select, or approve, the appointment of the team leader, team members, and alternates (optional). Or the DG serving at the time of the exchange can assign this responsibility to the GSE Chair who may appoint a special GSE Selection Committee to select the team leader, team members, and alternates (optional). The selection committee may consist of the district governor in office at the time of the exchange, immediate past district governor, district governor elect or nominee, three Rotarians and GSE committee chair.
 - a. The selected Team Leader is part of the Selection Committee in selecting Team Members.
 - b. Rotarians who serve on a club, or district-level GSE Selection Committee are expected to exercise complete transparency in their personal or business relationship with an applicant and must notify the committee chair in advance of the selection process of any actual or perceived conflict of interest due to the committee member's association with a GSE team candidate, e.g. familial relationship, employees of the same firm or organization, members of the same Rotary club, or member of the Sponsoring District, etc.
- 3. The selected Team Leader will be:
 - a. An experienced Rotarian, especially in international service, well-informed on the destination country and Rotary.
 - b. The Team Leader cannot be a current DG, an immediate PDG, or DGE
- 4. The selected Team Members will be:
 - a. Between the ages of 25 40. Applicants a year or two younger than 25 or a year or two older than 40 may be considered. However, 4.b. should always apply.
 - b. Fully employed and have two-year's experience in their field of work.
 - c. Capable of having their long-term career paths impacted through the GSE experience.
 - d. Live or work in the Host District.
 - e. See the Negotiable Options below for additional information on Team Members.
- 5. Both the Host and Partnering Districts should be informed on any Visa requirements. Each District is responsible for assisting the Outbound Team Members in obtaining the necessary Visa.
- 6. The hosting district will arrange a written itinerary for the visiting team that will:
 - Provide at least four customized vocational study days per team member (approximately 16 vocational days for a team of four) to meet individually with representatives of his/her profession or a closely related profession to study related techniques, conditions, and levels of development, and to exchange ideas and information.
 - b. Provide cultural, historical, environmental, educational, government, non-profit, business and industry tours that represent the District.
 - c. Provide free time for the team of at least 1½ days per week (free time can include the weekend) where no scheduled GSE activities are included.
 - Provide a mid-tour break that covers two nights and a minimum of 35 hours where the team is together with no scheduled activities. Examples of a mid-tour break may place the team in a location separate from Rotary activities or it can be free time at the District Conference or it can be a stay in Rotarian homes where the time is specifically designated with no Rotary functions.
 - e. Arrange for Club presentations, making every effort to schedule no more than 3 club presentations within each calendar week.
 - f. Arrange for team members to stay in Rotarian homes in order to facilitate the development of international friendship. Effort should be made to arrange a schedule where team members stay in each Rotarian home a minimum of 4-5 days.
 - g. This written itinerary is to be submitted to the partnering GSE Chair, no later than 1-month prior to departure, and reviewed by the Team Leader and Team Members for their prompt approval. Any areas of concern should be reviewed with the Team's GSE Chair who will discuss with the partnering GSE Chair in an effort to reach a resolution.

- h. Also, the Hosting GSE Chair will communicate with the Team Leader routinely during the tour for the purpose of resolving any problems, discussing any tour changes, and to schedule time(s) for the Team to meet to discuss/resolve any internal Team issues.
- 7. Members of the team will:
 - a. Obtain the mandatory insurance coverage as listed on the Certification of Insurance form, within the time frame established by the District.
 - b. Obtain the mandatory medical certificate as listed on the Medical Certificate form, within the time frame established by the District.
 - c. Develop a presentation that shares information about the team's home district as well as each team member's family and profession.
 - d. Dress professionally whenever representing Rotary during the tour. Uniforms should be considered or individual clothing that blends and matches with the balance of the team so that the group's appearance says they are a team.
 - e. Complete the post-tour Evaluation Form within 60 days of returning from the GSE tour. The forms are submitted to the GSE Chair who forwards them to the District Governor, to the partnering GSE Chair and District Governor.

As the GSE Chair, initial that you have reviewed the above Required Conditions and agree to comply with them: ______

Negotiable Conditions. GSE Chair should complete each question:

- 1. Length of the tour (same for both districts):
 - _____ Both Districts have agreed to the standard four week GSE.
 - ____ Both Districts have agreed to a _____ week GSE tour.
- 2. Number of Team Members (same for both teams):
 - _____ Both Districts have agreed to the standard four Team Members plus the Rotarian Team Leader.
 - _____ Both Districts have agreed to a team of _____ Team Members plus the Rotarian Team Leader.
- 3. Composition of the Team (does not need to be the same for both Districts):
 - a. _____ All members of the team will be non-Rotarians (must not be a Rotarian, honorary Rotarian, employee of Rotary or a spouse of a Rotarian. Additionally, a Team Member cannot be a lineal descendant, including a stepchild (whether adopted or not adopted) of a Rotarian.

If DDF funds are not used for GSE, the district is free to include lineal descendants as team members.

- A maximum of two of the team members may be lineal descendants of a Rotarian. All applicants will go through the same interviewing process and all applicants will be given equal opportunity. A final selection will be made based on which applicants are best suited for the team.
- c. _____ A maximum of ______ of the team members may be lineal descendants of a Rotarian. All applicants will go through the same interviewing process and all applicants will be given equal opportunity. A final selection will be made based on which applicants are best suited for the team.

Refer to the policy *Funding of GSE with District Designated Funds – Allowing Team Members to be Lineal Descendants of Rotarians.*

- 4. Airport for Departure and Arrival of both Inbound and Outbound Teams:
 - a. The teams will arrive/depart from the Host District at the following airport: _____
 - b. The Host District has designated the following airport for team arrival/departure: _____

There is no requirement that a team fly into/out of an airport located within the District. All options should be evaluated with consideration given to total cost, duration of the flight, and number of stops. Additionally, if the selected airport is some distance away from Hosting Clubs, arrangements will be required to transport the team to/from the airport.

5. The Inbound Team's presentation at Club meetings should be ______ minutes in length.

GSE Partnering Agreement continued, page 4 of 4.

- 6. The Inbound Team will attend our District Conference on the following dates ______ and will be scheduled to give a presentation of ______ minutes on the following date: ______.
- 7. In the interest of promoting Rotary's six areas of focus, our District supports the following projects located within our District:

Peace and conflict prevention/resolution
Disease prevention and treatment
Water and sanitation
Maternal and child health
Basic education and literacy
Economic and community development This information may be helpful to our Partnering District in their selection of Team Member(s). If a Team Member(s) has a

This information may be helpful to our Partnering District in their selection of Team Member(s). If a Team Member(s) has a career in any of the above mentioned Areas of Focus, these projects can become part of the Team Member's Vocational experience.

The Partnering Agreement is to be completed by each GSE Chair and submitted to the partnering GSE Chair for acceptance. Completion of the Partnering Agreement and signature by both GSE Chairs should be completed early in the GSE process.

PRINT NAME OF HOSTING GSE CHAIR

PRINT NAME OF PARTNERING GSE CHAIR

SIGNATURE OF HOSTING GSE CHAIR

SIGNATURE OF PARTNERING GSE CHAIR

DATE

DATE



TYPE OR PRINT INFORM	MATION LEGIB	LY		Date:		
Group Study Exchan	ge with:					
		COUNTRY		DISTRICT		
PERSONAL INFOR	-					
Name in full (as it a	ppears on yo	our passport)		Date:		
FIRST NAME (GIVEN)		MIDDLE		LAS	T NAME (FAMILY)	
Male	Female	Date of Birth:	// NTH DAY YEAR		Age:	
RESIDENCE PHONE	WORI	K PHONE	MOBILE PHONE	EMA	IL ADDRESS	
MAILING ADDRESS:	STREET	CITY	STATE	COUNTRY	ZIP CODE	
MARITAL STATUS	SPOUSE'S NAM	1E		NAME AND AC	GE OF DEPENDENT CHIL	DREN
NATIVE LANGUAGE		ADDITIONA	L LANGUAGES (READIN	IG, WRITING, SP	PEAKING)	
LIST ANY FOOD ALLERGIE	S		LIST AI	NY DIETARY OR	MEDICAL NEEDS	
PHYSICAL HEALTH / ENDU	JRANCE or PHYS	ICAL LIMITATIONS				
COUNTRY OF CITIZENSHI	P:		COUNT	RY OF BIRTH: _		
Person to notify in	case of an ei	nergency				
NAME		R	ELATIONSHIP	TELI	EPHONE	
ADDRESS				EMA	IL	
Occupation/Profession	on					
·		COMPANY / ORGANI			POSITION	
Rotary Club:		Distr	ict #	Yea	ars in Rotary:	
Club or District com	nittee experie	nce:				

TEAM LEADER APPLICATION, page 2 of 2.

Offices held in Rotary:
Leadership experience:
Community involvement:
International travel experience:
Additional relevant experience/knowledge that specifically qualifies you for team leadership:

TEAM LEADER APPLICANT'S COMMITMENT

Attached to this Team Leader Application is the Team Leader's Commitment containing obligations and responsibilities to which you must commit should you be selected as the Team Leader. The Commitment must be signed and submitted with this Application in order for you to be considered for this appointment.

In addition to the items found under the Team Leader's Commitment, the following items are specific to the position of Team Leader.

If appointed as Group Study Exchange Team Leader, I will accept the appointment and agree to discharge the following obligations and responsibilities:

- 1. I will inform the selection committee of relationships (professional or personal) to any non-Rotarian team member applicants.
- 2. Following the GSE tour, I play an active role in the home District's GSE program and committee.
- 3. I will follow the four-way test when representing the home district and Rotary.
- 4. I will communicate with the team during the pre-trip preparation period, during the exchange, and during the post-trip period, using positive communication and problem resolution skills in order to build and maintain a professional and cohesive team and to act as liaison between the team and host district as needed.
- 5. I will assume responsibility for facilitating all aspects of the exchange, including: Taking an active role in the team's pre-departure orientation to ensure that they are knowledgeable about the country(ies) to be visited and thoroughly acquainted with the aims, objectives, and ideals of Rotary along with the purpose of the GSE program to further international understanding and goodwill; and confirm that vocational visits have been planned by the host district that meets the team members' expectations and professional needs..

Additional information for the Team Leader applicant that is specific to this district's participation in the Group Study Exchange program:



TYPE OR PRINT INFORMATION LEGIBLY			Date:			
Group Study Exch	nange with:	COUNTRY		DISTRICT		
PERSONAL INFO	RMATION					
Name in full (as i		our passport)		Date:		-
FIRST NAME (GIVEN)		MIDDLE		LAST	NAME (FAMILY)	
Male	Female	Date of Birth: M	// IONTH DAY YEAR		Age:	
RESIDENCE PHONE	WO	RK PHONE	MOBILE PHONE	EMAI	LADDRESS	. <u></u>
MAILING ADDRESS:	STREET	CITY	STATE	COUNTRY	ZIP CODE	
MARITAL STATUS	SPOUSE'S NA	ME		NAME AND AG	E OF DEPENDENT CHILDREN	
NATIVE LANGUAGE		ADDITIO	NAL LANGUAGES (READIN	G, WRITING, SPE	AKING)	
LIST ANY FOOD ALLER	GIES		LIST AN	IY DIETARY OR I	MEDICAL NEEDS	
PHYSICAL HEALTH / EN	NDURANCE or PHY	SICAL LIMITATIONS				-
COUNTRY OF CITIZEN	SHIP :		COUNTRY OF BI	RTH:		_
Person to notify	in case of an e	emergency				
NAME			RELATIONSHIP	TELE	PHONE	-
ADDRESS				EMAI	L	
EMPLOYMENT H	IISTORY: List	current employm	ent first (must be ful	ll-time)		
1. Occupation/Pr	ofession					
		COMPANY / ORG	ANIZATION		POSITION	
Address:				Tel	ephone:	
Dates of Employm	nent:					_
Title / Duties / Res	sponsibilities: _					_
						-

TEAM MEMBER APPLICATION, page 2 of 3.

2. Occupation/Profession		
	COMPANY / ORGANIZATION	POSITION
Address:		Telephone:
Dates of Employment:		
Title / Duties / Responsibilities:		
3. Occupation/Profession	COMPANY / ORGANIZATION	POSITION
Address:		Telephone:
Dates of Employment:		
Title / Duties / Responsibilities:		

EDUCATIONAL DATA – ACADEMIC, TECHNICAL, PROFESSIONAL Additional sheets may be added

1.	NAME AND LOCATION OF INSTITUTION	DATES ATTENDED	DEGREE OBTAINED AND DATE RECEIVED
2.	NAME AND LOCATION OF INSTITUTION	DATES ATTENDED	DEGREE OBTAINED AND DATE RECEIVED
3.	NAME AND LOCATION OF INSTITUTION	DATES ATTENDED	DEGREE OBTAINED AND DATE RECEIVED

Indicate special recognition received, including scholarships, honors, awards and prizes. List, but do not attach, any articles, pamphlets, or books you have published.

List educational, fraternal, civic, professional, and other organizations of which you are, or have been, a member. Indicate offices held, if any.

RELEVANT INFORMATION: Additional sheets may be added.

Leadership experience: _____

TEAM MEMBER APPLICATION, page 3 of 3.

Community involvement:_____

International travel experience: _____

Additional relevant experience/knowledge that specifically qualifies applicant for team leadership:

ESSAY OF INTENT

A unique feature of the GSE program is providing outstanding business and professional people opportunities for studying their profession in another country. Please tell us what you hope to gain professionally by participation in the program and how you intend to use the GSE experience to enhance your long-term career path. Please attach your Essay as an additional page.

TEAM MEMBER APPLICANT'S COMMITMENT

Attached to this Team Member Application is the Team Member's Commitment containing obligations and responsibilities to which you must commit should you be selected as a Team Member. The Commitment must be signed and submitted with this Application in order for you to be considered for this appointment.

In addition to the items found under the Team Member's Commitment, the following items are specific to the position of Team Member.

If appointed as Group Study Exchange Team Member, I will accept the appointment and agree to discharge the following obligations and responsibilities:

- 6. I will accept the decisions of the team leader at all times.
- 7. I will inform the selection committee of any relationship (professional or personal) I may have to any Rotarians sponsoring my candidature.
- 8. THE FOLLOWING REQUIREMENT APPLIES WHEN DISTRICT FUNDS ARE USED TO FINANCIALLY SUPPORT GSE. I certify that I am not: 1) a Rotarian, 2) an employee of a club, district or other Rotary entity, or of Rotary International, 3) the spouse, a lineal descendant (child or grandchild by blood and stepchild, legally adopted or not), the spouse of a lineal descendant, or an ancestor, parent or grandparent by blood) of any person in the foregoing two categories, or the spouse of another team member on the same team.
- 9. I will consider Rotary or Rotaract membership, if invited.

Additional information for Team Member applicant that is specific to this district's participation in the Group Study Exchange program.

SIGNATAURE

DATE

ROTARY CLUB ENDORSEMENT

The Rotary Club of ______ proposes ______ to the Group Study Exchange interviewing committee for consideration as a member of the district GSE team. The Club attests that it has interviewed the applicant and has invited the applicant to be a guest at a Club meeting(s).

If the applicant is appointed to the team by the interviewing committee, the Club will regularly invite the team member as a guest of the club in order for the team member to gain understanding of Rotary and the projects of the sponsoring club.

GROUP STUDY EXCHANGE



TEAM LEADER AND TEAM MEMBER COMMITMENT

This commitment is to be attached to, and becomes a part of, the Application form.

GS	E Team Leader Applicant name:
	PLEASE PRINT
GS	E Team Member Applicant name:
	PLEASE PRINT
Ple	ase read the following terms and conditions. I agree that if I am selected for the team, I will comply with these obligations and
	ponsibilities.
	-Trip Obligations, I will:
1.	Become well-informed on the host country and Rotary.
2.	Meet and participate in team meetings, minimum of 12 hours, for the purpose of forming a cohesive team, learning about Rotary, GSE
	and the host country, and developing presentation programs.
3.	Actively participate in a language and cultural training program if language differences exist between the paired districts.
4.	Participate in the preparation of speeches/presentations that are adjustable in length, to be given at Rotary club meetings, District
	Conference and other functions. (GSE Chair will provide information on type and length of presentations.)
5.	Obtain and pay for medical insurance valid and payable in the country(ies) in which the team will travel and visit. Details found on the
	Certification of Medical Insurance form. I attest that I am physically and mentally fit to thoroughly participate in an intensive program of
	study and travel. And I will obtain and pay for a medical exam certifying to my physical and mental ability. Details found on the Medical
_	Certification form.
6.	For travel to the host country of the following are required. I am responsible for expenses involved in
	obtaining the following.
	Visa. Additional information:
7	Inoculations. Additional information
7.	
	time, if deemed appropriate. ht Arrangements:
<u>1.</u>	Round-trip airfare is paid by the sponsoring District, by the team member, or by both parties per the following arrangements:
••	District:
	Team Leader:
	Team Member:
2.	Regardless of how the air fare is paid, economy round-trip tickets will be booked. The point of departure will be determined by the
	sending district; point of entry will be determined by the receiving district.
GS	E Participant's Safety:
1.	If the sponsoring or host district determines, in its sole discretion, at any point in the GSE process, that GSE participant safety in the host
	country is, or could be, at risk, the District may require that the GSE itinerary be modified, cancelled or indefinitely postponed. If already
	in the host country, the team may be asked to return home immediately, In such instances, I agree to abide by Rotary's decision as to
	what, if any, alternatives are available to GSE teams whose trip has been modified, cancelled, or postponed due to safety concerns.
2.	Should I be required to return home prematurely due to travel safety concerns, and I choose to stay, I accept all responsibility for my
	safe return home.
3.	I will refrain from engaging in dangerous activities for the entirety of the GSE tour. When in doubt, a team member will discuss with the
	team leader.
4.	Team leader or team members who, based on their profession, engage in any type of medical practice or activity including but not
	limited to routine medical procedures, surgical procedures, dental practice, or contact with infectious diseases, are reminded that they
	are solely responsible for any and all liability that may arise from their participation in this activity, including providing for adequate
-	insurance.

5. While participating in GSE, I may be involved in some activities that: expose me to disease, injury, sickness, strenuous physical activity, inclement weather, political unrest, cultural misunderstandings, issues resulting from non-compliance with laws, physical injury or harm, crime and fraud. I understand these risks and personally assume all risks involved with this GSE experience.

6. If I, because of serious illness, injury, or for personal reasons, am unable to complete the terms of this agreement and must return home, this district will not be responsible to pay for transportation arrangements above the original cost of purchased tickets. Under certain situations, I may be asked to reimburse this Rotary District for airfare costs paid for by this District. Nor will Rotary International, the district nor its clubs, assume any additional costs including the cost of any medical care or treatment, now or in the future.

Continued on page 2 of 2.

Team Leader and Team Member Commitment, page 2 of 2.

During the Tour Responsibilities:

- 1. A high standard of behavior and deportment is expected from team members that reflects credit on Rotary, the sending district and the home country. If inappropriate behavior warrants dismissal from the team, the team member is responsible to reimburse the sponsoring Rotary district the cost of round-trip airfare that was paid by the district.
- 2. I will obey all applicable laws of the host country.
- 3. I agree to travel with the team during all scheduled team or host family activities, except during those periods when individual activities are specifically provided, unless excused by the team leader. As a team member, I will inform the team leader of my whereabouts at all times.
- 4. I will have sufficient funds to meet personal and incidental expenses while abroad.
- 5. I am solely responsible for my actions and property while participating in and traveling to and from GSE activities.
- 6. I do hereby release Rotary International, this Rotary District and its clubs from liabilities, responsibility and obligation, either financial or otherwise, beyond providing the opportunity to be part of this Group Study Exchange experience.
- 7. I agree not to make arrangements with friends or family with whom I have acquaintance and who are living/visiting in the host district or area. This policy applies to the entire length of the tour.
- 8. Family members or friends may not accompany the team during the tour under any circumstances.
- 9. After the tour, team members may travel in the host country or elsewhere at their own expense. However, understand that the district, club, and host family responsibilities cease at a time designated as the end of the GSE.
 - a) Where additional travel requires a change to the flight arrangements, and additional costs incur as a result of the change, the team member is responsible to pre-pay the district for the additional costs.
 - b) All arrangements to extend a tour must be communicated to the team leader and to the hosting GSE Chair.
 - c) All arrangements to extend a tour must be finalized prior to departure. Arrangements are not to be made or changed during the GSE, this includes during touring hours and also during time spent with a host family.

Post-Trip Obligations. I will:

- 1. Participate in the preparation of a post-tour presentation for use at Rotary club meetings, district conference, foundation events, or other Rotary events as requested.
- 2. Within three months of my return home, I will complete and submit a GSE End of Exchange Evaluation of my tour experiences. The team leader is responsible to submit all forms to the GSE chair.
- 3. Take every opportunity after the tour to share what I have learned through informal contacts and by addressing Rotary clubs, Rotary events, and other appropriate organizations.
- 4. Participate in the following Rotary events occurring during the year following my GSE tour.
- 5. Attend at least one Rotary club meeting with my employer to hear my team's post-GSE presentation. This will help my employer understand the significance of the exchange experience.
- 6. I authorize Rotary to share photos from my Evaluation, or from other sources, for promotional purposes to further the Object of Rotary, including but not limited to Rotary publications, advertisements, and websites. I do not authorize Rotary, or any other entity to use these photos for any commercial purpose.

Additional information specific to this district's participation in the Group Study Exchange program:

By my signature, I attest that I have read, understand, and agree with the above terms of Commitment, and that if I am selected to be a member of the GSE team, that I will comply with all of the above terms of Commitment.

_____ Team Leader applicant

_____ Team Member applicant

Signature

Date

Policy Date: February 2014



GROUP STUDY EXCHANGE – BIOGRAPHICAL INFORMATION

Each Team Leader and Team Member is responsible to complete this form. When the forms are complete for the entire team, the forms are submitted to the GSE Host District promptly after the team is selected, but no later than <u>four months prior to</u> <u>departure</u>. The information will assist the Host District in planning quality vocational days and comfortable host family accommodations. TYPE OR PRINT INFORMATION LEGIBLY

I am a GSE _____ Team Leader _____ Team Member

PERSONAL INFORMATION

FIRST NAME (GIVEN)		MIDDLENAME	LAST NAME (FAMILY)	NICK NAME
Male	_ Female	Date of Birth:	// TH DAY YEAR	-	Age:
RESIDENCE PHONE	WOR	(PHONE	MOBILE PHO	NE EMAIL	ADDRESS
MAILING ADDRESS:	STREET	CITY	STATE	COUNTRY	ZIP CODE
MARITAL STATUS	SPOUSE'S NAM	IE NA	ME AND AGE OF DE	PENDENT CHILDREN	
NATIVE LANGUAGE	ADDI	TONAL LANGUAGES (REA	ADING, WRITING, SP	EAKING)	
LIST ANY FOOD ALLERG	IES		LIST	ANY DIETARY OR MI	EDICAL NEEDS
DO YOU SMOKE?		DO	YOU HAVE ANY AL	LERGIES TO, OR FEA	R OF, ANNIMALS?
VOCATIONAL INFO	RMATION				
EDUCATIONAL BACKGR	OUND				
Current Employer:					
VOCATION / JOB TITLE		NAME OF EN	MPLOYER	TYPE OF BUSIN	ESS DATE HIRED
Previous Employer(s)	1				
VOCATION / JOB TITLE		NAME OF EN	MPLOYER	TYPE OF BUSIN	ESS DATES EMPLOYED
VOCATION / JOB TITLE		NAME OF EN	MPLOYER	TYPE OF BUSIN	ESS DATES EMPLOYED
Additional pages can be ad Describe your <u>curren</u>		ilities:			

Provide your **professional interests**, what would you like to do for vocational visits, what type of businesses would you like to visit, what do you want to accomplish during your vocational tours? The information you provide will assist in planning for quality vocational days.

Describe your **personal interests/activities/hobbies**. What are you interested in learning other than professional, vocational interests? What do you enjoy that is **not vocational**?



GROUP STUDY EXCHANGE CERTIFICATION OF MEDICAL INSURANCE GSE TEAM MEMBERS AND TEAM LEADER

Completion of this form is mandatory as stated in the GSE Partnering Agreement.

Appropriate documentation / proof of insurance is to be attached.

Submit completed form and documentation to the District GSE Chair in a timely manner as directed by the GSE Chair. Proof of medical insurance should be submitted to the District GSE Chair prior to the purchase of airline tickets.

The sponsoring GSE Chair should send a copy of this Certification to the Host GSE Chair prior to the beginning of the tour.

I hereby certify that I have obtained the following minimum required insurance coverage, valid in the country(ies) in which I will travel and study during my participation in the Group Study Exchange program.

The insurance is in effect from the date of my departure through the date of my return home.

This insurance coverage satisfies at least the minimum amount of insurance coverage as follows:

- US \$250,000 or equivalent for basic major medical expenses, including accident and illness expense, hospitalization, and related benefits.
- US \$50,000 or equivalent for emergency medical evacuation
- US \$10,000 or equivalent for accidental death or dismemberment and repatriation of remains

This insurance coverage was purchased as medical insurance to cover me during the Group Study Exchange.

Date coverage begins: Date coverage stops:

	_/	_/
MONTH	DAY	YEAR
	_/	_/
MONTH	DAY	VEAD

_ During the Group Study Exchange I will be covered by an existing policy provided by my employer or purchased by me independently. The policy will remain in force prior to, during my GSE, and following my GSE.

NAME (PRINT)

NAME (SIGNATURE)

DATE

Appropriate documentation / proof of insurance is attached.

Policy Date: February 2014



GROUP STUDY EXCHANGE MEDICAL CERTIFICATION GSE TEAM MEMBERS AND TEAM LEADER

Completion of this form is **mandatory** as stated in the GSE Partnering Agreement.

Submit completed form to the District GSE Chair in a timely manner, as directed by the GSE Chair. Medical Certification should be submitted to the District GSE Chair prior to the purchase of airline tickets.

Date: _____

I have this day examined _____

NAME (PLEASE PRINT)

and have found him/her to be in good health and enjoying full working capacity. He/She is physically and mentally able to fully participate in an intensive program of study and travel away from home.

NAME OF EXAMINING PHYSICIAN (PLEASE PRINT)

SIGNATURE OF EXAMINING PHYSICIAN

ADDRESS

CITY, STATE/PROVINCE

COUNTRY

Policy Date: February 2014



GROUP STUDY EXCHANGE TEAM MEMBER AND TEAM LEADER END OF EXCHANGE EVALUATION

Each team leader and team member is responsible to complete this form. When the forms are complete for the entire team, the forms are submitted to the sponsoring GSE Chair no later than <u>three months following the end of the tour.</u> The sponsoring GSE Chair is to submit the forms to the hosting GSE Chair promptly upon receipt. The information will assist the sponsoring District and the host District in planning quality Group Study Exchanges. TYPE OR PRINT INFORMATION LEGIBLY

I was: Tea	am Leader	Team Member	Exchange Year:
NAME (PLEASE PRINT)			EMAIL ADDRESS

SPONSOR DISTRICT AND COUNTRY

HOST DISTRICT AND COUNTRY

Please answer the following questions. If more space is necessary, attach additional pages to this form.

What were your reasons for participating in a GSE? Did this exchange meet your expectations?

How did your sponsor District prepare you for the exchange? Do you have suggestions for improving the orientation process?

How has your experience changed your outlook towards the host country and towards the sponsor country?

What professional experience did you gain from the exchange?

What was the most important aspect of the exchange?

Give specific examples of activities that you and your team participated in during the exchange.

Team Members only: How will you continue to stay involved in Rotary? If invited, would you become a member of a Rotary or Rotaract club?

Continued on page 2 of 2.

End of Exchange Evaluation page 2 of 2.

Please use the following scale to evaluate the items listed below:

0 - Does not apply 1 – Lowest possible rational contract of the second s	ng 2 – Low rating	3 – Medium rating
4 – High rating	5 – Highest Rating	
 The guidance and cooperation you received a. Your sponsor GSE chair b. Your team leader (team members online) c. Your host GSE chair d. GSE materials and literature 		The effectiveness of your orientation before the tour in: a. Life and culture in host country b. Goals and objectives of Rotary c. Goals and objectives of the GSE Program.
 a. Host family experiences b. Effectiveness of vocational days 	4. 	List the number of presentations you gave _ a. Rotary clubs during tour _ b. Other groups during tour _ c. Rotary clubs after tour _ d. Other groups after tour
5. Did you engage in at least four full days of v Comments?	ocational study during the st	udy tour? Yes No

- 6. Did the GSE program meet your expectations? ____ Yes ____ No Comments?
- 7. Do you see the GSE experience having a significant impact on your personal life? ____ Yes ____ No Comments?
- 8. Can you think of ways to enhance the GSE program's effectiveness?
- 9. What suggestions do you have for future GSE team leaders / members?



GROUP STUDY EXCHANGE HOST DISTRICT EVALUATION

To be completed by the host District GSE Chair and submitted to the sponsoring GSE District Chair no later than <u>three</u> <u>months following the end of the tour</u>.

The information will assist the sponsoring District and the host District in planning quality Group Study Exchanges. TYPE OR PRINT INFORMATION LEGIBLY

NAME (PLEASE PRINT)		TITLE	EMA	L	
SPONSOR DISTRICT AND COU	NTRY		HOST DISTRICT AND COUN	FRY	
Your opinions:					
Were language skills of	of the visiting tear	n adequate to b	enefit from the excha	nge? Yes No	
Please use the followi	ng scale to evalua	ate the items list	ed below:		
0 - Does not apply	1 – Lowest pos	sible rating	2 – Low rating	3 – Medium rating	
4 – High ra	ating	5 – Hig	ghest Rating		
1.Image: Unity and2.Communit3.Effectivend4.Suitability5.Suitability	cation with visitin ess of visiting tea of the visiting tea	ig team's distri am presentatic am members	ct before the visit		
Statistics:					
2. Number of c 3. Total number	amilies that were clubs participating er of vocational stu eam rest days		t team members		

5. ____ Number of club visits and presentations

Additional Comments:

Best Practices



OPTIONS FOR FUNDING OF GSE TEAM AIR FARES

Your District is continuing GSE, but may be concerned about assuming the cost of airfares for the team members. Following are three options adopted by other districts. You may find a workable solution in the options. You can also revise an option in any way that suits your needs.

Options:

- 1. Selected Team Leader is responsible 100% for the cost of his/her airfare. District pays 100% of the team members' air fare.
- 2. Each member of the team, along with the team leader, is 100% responsible for his/her airfare.
 - a) The team decides how they will travel to the host district: which airport, flight, etc.
 - b) Following input from each member of the team, the Team Leader, in consult with the GSE Chair, makes the final decision on the arrangements.
 - c) Team Members must comply with that decision.
 - d) Each member of the team books and pays for his/her ticket.
 - e) Tickets need to be purchased by a specific date, with copy of purchased arrangements given to the Team Leader.
- 3. District reimburses each Team Member, including the Team Leader, for a portion of his/her airfare.
 - a) Option #2, a-e, is followed.
 - b) How much each team member, and team leader, will receive from the District is decided by the District Governor as part of his/her budget.
 - c) The amount can change year-to-year based upon the actual cost of air tickets and other budget needs.
 - d) The reimbursement check is given to each team member, and team leader, at the airport upon their departure. Or within a few days of departure. The reimbursement check is held until departure time to assure that the team members participate in the GSE.
- 4. Another variation on #2 and #3. Each team member appointed to the team must contribute \$xxx to the district offsetting the cost of airfare. This is payable within 4 weeks of appointment to the team and confirms the individual's place within the team.
 Added Feb 2014.
- 5. As another option to reduce cost, a GSE match can cover two Rotary years with hosting the Inbound team one year and sending the Outbound team during the adjoining Rotary year.

Following procedures apply to each of the above options:

- 1. Team leader and team member applicants are informed of the District policy at time of interview.
- 2. All other GSE expenses are covered by each District as they were under the traditional GSE, including: meals and lodging, internal travel during the tour, participation in District Conference, attendance at Rotary meetings, etc.
- 3. Each District has the authority to decide how to handle the airfare expense, exclusive of decisions made by the partnering district.
- 4. A team member can extend his/her time at the end of the tour for personal travel time; however, any additional cost or revision to the travel schedule will not be considered in determining flight arrangements for the team nor with the District incur any additional costs.
- 5. When <u>no</u> DDF funds are used to support the GSE Program, specifically airfares, a team can include lineal descendants of Rotarians. See policy 'Funding of GSE with District Designated Funds – Allowing Team Members to be Lineal Descendants of Rotarians'



<u>Best Practices</u> FUNDING GSE WITH DISTRICT DESIGNATED FUNDS ALLOWING TEAM MEMBERS TO BE LINEAL DESCENDANTS OF ROTARIANS

With the start of Future Visions, July 01, 2013, The Rotary Foundation no longer financially supports or oversees the Group Study Exchange Program.

Districts can continue developing GSE teams and are free to create various new standards, rules and policies that add more flexibility and creativity to the program.

One change considered by some districts is to allow lineal descendants (children, grandchildren) of Rotarians to become a GSE Team Member. However, this is not permitted by TRF.

In order to obtain a clarification from TRF, District 7390 raised the following question:

"D7390 intends to continue GSE, basically following the same practices and philosophies as existed under GSE prior to Future Vision. D7390 will fund the GSE with District Designated Funds (DDF) as an allowable expenditure of DDF. D7390 would like to allow lineal descendants of Rotarians to become a GSE Team Member Is this permissible?"

Karen McLeod, is the Training and Communication Specialist, Rotary Grants, she can be reached at 847-424-5288 in Evanston II 60201 or by email at Karen.mcleod@rotary.org. Karen responded:

"The policy about using district grant funds to benefit lineal descendants of Rotarians has stayed the same from the previous policy under Matching and District Simplified Grants. (Previous policy being pre-Future Vision.) Foundation grant activities must comply with the conflict of interest policy. This policy, detailed in section 7.030 of TRF Code of Policies http://www.rotary.org/RIdocuments/en_pdf/trf_code.pdf stipulates that ineligible award recipients include lineal descendants of Rotarians".

Note: Exact wording from the Rotary Foundation Code of Policies, issued April 2013, section 7.030, Conflict of Interest Policy for Program participants, states:

1. Award Recipient Eligibility

Ineligible Persons, as defined below, shall not be candidates or final award recipients or beneficiaries of any TRF program, except for global grant vocational training teams and Group Study Exchange team leaders. Ineligible Persons shall include Rotarians; honorary Rotarians; employees of clubs, districts, or other Rotary Entities (as defined in the *Rotary Code of Policies*) or of Rotary International; spouses, lineal descendants (children or grandchildren by blood, legal adoption, or marriage without adoption); spouses of lineal descendants, or ancestors (parents or grandparents by blood) of persons in the foregoing categories;.....

However, if a District's GSE is funded by a fund-raiser or if the Team Members are personally purchasing their airline tickets, meaning that DDF funds are not used to cover GSE expenses, then a District could consider lineal descendants of Rotarians as members of the team.

Best Practices

BOOKING AIRLINE TICKETS – BAILEY TRAVEL PROGRAM

Travel Time and Bailey Travel is an option offered to all Rotary Districts

It is not a GSE requirement.

A district can select any agency or means to book GSE air tickets

Option: Travel Time & Bailey Travel is a travel agency in Pennsylvania USA owned by a second generation Rotarian. This agency is highly experienced in international travel. They have offered to make flight arrangements for GSE teams from any country. They guarantee lowest fare, 24/7 service, plus other benefits. Refer to **Bailey Travel Program** for details and booking information

To assure quoted price, tickets must be booked at least 21 days prior to departure.

Earliest tickets can book is 10 months out.



You will not find a lower airfare from anyone!! Guaranteed!

Travel Time Travel Agency's Best Fare Guarantee Program is available to all travelers who book flights through one of our travel consultants.

If you find an airfare for the same flights and dates of travel for the same number of travelers, and subject to the same fare restrictions, on any other full service travel Web site or airline site that is at least \$5 lower than the airfare you purchased on the same day through one of our Travel Time Travel consultants, we will issue a credit coupon in the amount of \$50 for every such ticket you booked on that day, redeemable on your next purchase for air travel through Travel Time.

Travel Time Travel Agency, Inc., Best Fare Guarantee (BFG) Terms and Conditions

- The confirmed airfare you purchased through us will be compared to the airfare on the website you indicated at the last point immediately prior to purchase. Fares must be compared with like fare restrictions, e.g., if an unrestricted airfare is purchased through us, it will not qualify for our BFG if compared to a restricted airfare on a Web site.
- BFG applies only to the total airfare and does not apply to differences based on consulting, booking, processing, shipping, paper-ticket and other fees not collected on the airline ticket.
- BFG is available to any customer who makes a qualifying airfare purchase on or after October 1, 2005.
- You must provide the complete Web address (URL) where you found the lower airfare, a print out of the full itinerary, showing the lower fare and file your claim by 5PM ET the same day you booked your flight with Travel Time.
- BFG does not apply to unpublished rates that are not available to the general public, including but not limited to, corporate discount airfares, government fares, military fares, meeting fares, wholesaler fares or consolidator fares.
- BFG does not apply to total airfares on a Web site that have been reduced as a result of promotional discounts, such as dollars off coupons, loyalty program discounts or fly free offers or to package fares, such as airfares sold as part of a travel package or to airfares where the carrier or itinerary details are unknown until after purchase.

Verification of Claims and Coupon Redemption

After submission of a claim, we will contact you via e-mail. Please keep a copy of all documentation. We reserve the right to deny claims that cannot be verified, or for which you have not provided all information.

- 1. Upon verification of the lower airfare, Travel Time will email you, within 2 business days, a BFG Coupon in an amount equal to \$50 USD for each eligible ticket purchased as part of the same confirmed reservation through one of our travel consultants. One BFG Coupon will be issued per reservation to cover all ticketed travelers and is valid for a future airfare purchase through one of our travel consultants.
- 2. BFG Coupons are valid toward future purchases of air travel booked through one of our travel consultants within one year of the coupon issue date. To redeem a coupon, the new purchase must equal or exceed the total amount of BFG Coupon. The BFG Coupon amount will be refunded to the credit card used for payment on the new purchase. The Travel Consultant should be notified that you will be using a BFG coupon.
- 3. BFG Coupons are not redeemable for cash and are not transferable
- 4. The BFG Coupon is the sole compensation that will be provided for Travel Time's failure to fulfill our Best Fare Guarantee and may be used only one time.
- 5. If your qualifying purchase is for a refundable ticket and you later refund the ticket, any BFG Coupon issued in connection with the Best Fare Guarantee will become void and invalid.

Travel Time Travel Agency, Inc., reserves the right to modify or cancel the Best Fare Guarantee at any time without prior notice.

What do you really get for the fee you pay us????

- **A GUARANTEE of the lowest fare!** If you purchase an airline ticket from us and, on the same day, you find a lower <u>available</u> fare for that itinerary, we will refund you the difference! We will ask you for some documentation, but the guarantee is a very simple one because we believe in our ability to find you the lowest fare, despite what all those multi-million dollar ads tell you!
- **24/7 Customer telephone support!** If you are stuck at the airport at midnight, anywhere in the world, we can be contacted, <u>at our normal number</u>, for any changes to the itinerary, reaccommodations on a different flight, or even a hotel reservation if no other flights are available that day.
- An assurance that if the price on your itinerary goes down, even after you have bought the ticket, we will reissue the ticket at the lower price (Our automation looks for these lower fares 24/7!) Since the airlines don't permit any refunds on non-refundable flights, we will issue an electronic voucher for future use by that traveler on the same airline. We will even keep track of that voucher and suggest you use it the next time you fly somewhere!
- A tremendous saving of your time. Do you really have the time, with your business schedule, to look at numerous internet sites to make sure you get the best price? Our automation provides our experienced Travel Consultants immediate access to all airline fares, including airline web fares.
- **Tremendous savings on hotels** due to our negotiated discounts at almost 30,000 hotels around the world
- **Great savings on rental cars** due to our discounts with Hertz, National, Avis and Enterprise Car Rental companies.
- **On Line Management reports** that tell you everything you would ever want to know about your travel patterns and expenses. In the unlikely event of another problem affecting the entire country's air system, these reports can even tell you where all the company's travelers are at any given time, enabling us to find alternate methods of getting them home.

Still want to do things yourself on line? Then ask us about our robust corporate travel oriented on line reservation system. You get a lower fee, an ability to do it all yourself, and still get all the services listed above!