ROTARY FRIENDSHIP EXCHANGE

OPERATING POLICIES AND PROCEDURES

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Author on behalf of the committee: Bill Gormont, PDG
Reviewed and input provided: Scott MacDonell, PDG

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GENERAL STATEMENT

This document is intended to identify the operating practices of D7120 as it relates to both inbound and outbound Rotary Friendship Exchanges. Additional guidelines are contained in the Rotary Friendship Exchange Handbook (702en). Some, but not all, of the information contained in that guide is included in this document.

All nouns and pronouns herein, and any variations thereof, shall be deemed to refer to masculine, feminine, singular or plural as the identity of the person or persons may require.

1) Committee Framework

a) Purpose

i) The Rotary Friendship Exchange (RFE) program gives Rotarians and their families the opportunity to experience other cultures firsthand, by participating in reciprocal visits with Rotarians from other countries and their families. Introduced in 1984, this program aims to advance international understanding among Rotarians. It provides Rotarians with the opportunity to form personal contacts and make long-lasting friendships while exploring different areas of the world.

b) Exchange Types

i) Cultural, Fellowship, Service, and Vocational

c) Participation

i) Rotarians and immediate family members (spouse/partner and adult children) are eligible to participate in a Rotary Friendship Exchange.

ii) Eligibility for participation on an outgoing exchange is typically reserved for those who have previously hosted during an inbound exchange.

iii) An exchange team (inbound or outbound) is comprised of “traveler units”.

(1) A travel unit is defined as either:

(a) Two individuals traveling together and sharing sleeping quarters.

(b) One individual traveling alone.

(2) The total number of “traveler units” is limited and agreed upon by both the traveling and the receiving districts at the beginning of exchange negotiations. The typical number of “traveler units” is five but can be more or less.

d) Funding

i) D7120 historically provides a budget line item of $500 to $1,000 USD for the Rotary Friendship Exchange to operate related to administrative expenses such as document duplication, etc.

ii) Personal exchange expenses are funded entirely by the program participants. Generally, traveling guests are responsible for their travel expenses and personal spending (for example, souvenirs, restaurant meals, snacks, toiletries, etc.), while hosts are expected to provide

housing, home meals, and sightseeing opportunities (the same courtesy that would be extended to a visiting friend).

2) Committee Leadership Positions

a) Committee Leadership Selection and Term Limits

i) Selection Process
   (1) Interested committee members will be invited by the chair to volunteer for a position in which they will be most helpful.

ii) Term Limits
   (1) A leadership position term is 3 years, with the opportunity to serve multiple 3-year terms upon mutual agreement by both the committee and the individual.
   (2) Committee leadership positions will be reviewed and changed as needed in conjunction with the Rotary year.
   (3) Change of leadership positions will be staggered to promote effective training & consistency.

b) Chair

i) Qualifications
   (1) The chair should have, but is not required to have, a minimum of three years of committee membership. Ideally that individual would have multiple experiences with each of the following activities:
      (a) Inbound exchange hosting
      (b) Outbound exchange traveling
      (c) Serving as an outbound exchange team leader).

ii) Appointment
   (1) The position is appointed by the District Governor Elect (DGE).
   (2) The DGE communicates the appointment each year to the RFE coordinator at Rotary International's office of Service and Engagement.

iii) Duties
   (1) Lead & organize the committee
   (2) Establish committee roles
   (3) Schedule meeting dates & agendas
   (4) Establish annual goals with participation and consensus of the entire committee

(5) Maintain communication with the District Governor track
(6) Develop and secure D7120 budget line item
(7) Manage committee leadership succession planning.

c) Vice Chair

i) Qualifications
(1) The vice chair should have a minimum of two years of committee membership and have participated in both an inbound and outbound exchange.
ii) Selection
(1) The position is selected by the chair from committee members who volunteer.
iii) Duties
(1) Work in conjunction with the committee chair; Take assignments from chair; Assist with calendar schedules; Assist with committee growth.

d) Exchange Coordinator

i) Explore exchange opportunities with both international and domestic districts.
ii) Consider exchange opportunities with RFE experienced districts as well as those districts that have a willingness to begin RFE participation
iii) Recruit & train team leaders
iv) Communicate frequently with inbound districts
v) Mentor/train other Rotary Districts who haven't engaged in previous exchanges
vi) Coordinate exchange calendar
vii) Maintain historical records of all exchanges (inbound/outbound, district number, location, D7120 team leader and travelers).
viii) Work with the committee to develop collateral promotional pieces (brochures, website presence, etc.)

e) Outreach Coordinator

i) Recruit inbound hosts & outbound travelers.
ii) Coordinate *House of Friendship* booth presence at RI Conventions
iii) Maintain public image awareness within the district
(1) Visit D7120 clubs with awareness programs
(2) Coordinate *Grapevine* articles

f) Team Leader Inbound

i) Maintain active communication with the inbound group team leader
   (1) Share the number of "traveler units" that D7120 can receive.
   (2) Share anticipated expenses for the inbound team members.
   (3) Obtain and document inbound travelers' profiles and special needs; distribute that information to the RFE committee and D7120 hosts.
   (4) Obtain, document and provide D7120 host profiles to the inbound team leader.

ii) Coordinate in conjunction with the Outreach Coordinator D7120 host selection and traveler assignments for the district geographical regions. Identify and use region specific coordinators when beneficial.

iii) Coordinate and schedule planned D7120 activities for the inbound travelers; Share the activity schedule with the inbound team leader.

iv) Lead inbound exchange update discussion at all RFE committee meetings

v) Schedule routine and special inbound exchange meetings as necessary.

vi) Coordinate and schedule a host-exchange evaluation with the D7120 hosts.

g) Team Leader Outbound

i) Maintain active communication with the D7120 outbound team members.

ii) Maintain active communication with the receiving district's team leader.
   (1) Obtain and coordinate requirements to enter the destination (i.e. visa, vaccines, travel documents, etc.)
   (2) Obtain and document outbound travelers' profiles and dietary/disability needs; distribute that information to the receiving district's team leader.
   (3) Estimate anticipated expenses for the outbound team members.

iii) Obtain and document travel logistics from the outbound team members (transportation method with arrival times, visa's, travel documentation, vaccines, etc.)

iv) Create in conjunction with the Technology Coordinator an exchange specific promotional presentation for clubs.

v) Lead outbound update discussion at all RFE committee meetings

vi) Schedule outbound exchange meetings with the outbound travelers as necessary.

vii) Coordinate post-exchange evaluation with the D7120 outbound travelers

h) Technology coordinator

i) Create & maintain a Rotary Friendship Exchange presence on the D7120 website.

ii) Provide technological assistance as necessary for:

(1) Creation of brochures (*RI Brand Center* Templates), duplication of materials, etc.

(2) Presentation development for digital promotion (PowerPoint programs; Use of computer and display hardware, etc.)

(3) Develop and maintain a shared historical document archive.

i) Secretary/Treasurer

i) Document and archive meeting minutes & distribute to RFE members

ii) Maintain and report quarterly status of the Rotary Friendship Exchange Committee financial budget.

iii) Develop and maintain a committee membership distribution list.

Prepared on behalf of the committee by:
PDG Bill Gormont billgormont1@gmail.com 585-802-6813

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