

Rotary Youth Exchange Task Checklist

Due Date	What	Who's involved	Comments	Done
JULY				
	Club makes decision to participate (or not) for following (not upcoming) school year.		Deadline to participate is September. Allocate budget	
	Select YEO and Counselor. District vetting for YEO and Counselor, and online training	District 5050 RYE Committee, YEO Counselor		
	Obtain a backup host family (or 2) for our inbound student	Club YEO	The backup families will need to complete all of the same training and application material that all other host families must complete.	
	Hold a debriefing session for returning students & their families	Dist. 5050 RYE Committee	Per Rotary Code of Policies 41.060.15.	
AUGUST				
	Prepare for recruitment of Outbound Applicants for exchange one year from now	Club YEO, Club Committee	Prepare materials and strategies for recruiting as soon as school begins. Initial contact with schools and recruiting can be done the previous spring	
Mid August	Inbound student likely to arrive, Outbound student likely to depart.	Club YEO, Counselor, host family		
SEPTEMBER				
	Inbound student arrives. Welcome inbound student at airport.	Club YEO and Counselor Host family/families	Arrival and departure can occur as early as mid-August.	
Early Sept.	After inbound student arrives, complete the arrival information for the inbound student	Club YEO	Update YEAH system with fact of arrival (required so that the US State Department's SEVIS record will be updated, District has confirmed arrival, and RI reporting will be accurate). This "confirm arrival" process also allows the YEO to confirm who the first host family will be (if it has changed since the guarantee form was submitted). NB: a 1/14/15 document provided titled "ARO Training" states: "Students must be Activated [by the State Dept. liaison] within 30 days of their Program Start date, or your District will face a very steep penalty from the Dept of State (several hundred dollars per student).	

	Outbound student leaves		May occur as early as mid-August, determined by hosting club	
	Outbound recruitment, step 1	School counselors School principal RYE committee Club Pres. Club Sec'y	-Provide flyer to School (& other area HS?) -Provide short form "intent to apply" -obtain Club's commitment to the financial responsibilities (complete Club Certification)	
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Complete monthly Counselor Report on YEAH Portal	Counselor	YEAH Portal link is https://yehub.net/cgi-bin/W05_get.cgi?pgid=ye01	
Early Sept.	Welcome student BBQ			
Early Sept.	Help inbound student open a bank account, obtain a phone & register for school	Club Counselor and YEO	The student may also want to obtain a Y membership, an ORCA card (which can be re-loaded at a QFC or Safeway; students can't load on-line), and other things that will help them integrate into our community. School registration may require an ASB card & payment of some fees, which are reimbursable to the host family, counselor, or YEO by the Club. There is also a process the student needs to follow to sign up for on line access to school records (re grades, homework, etc.). The bank account will be provided by a local Bank. The phone will be paid for by each host family, the YEO or another person, and expense will be reimbursed by the club. Data charges can be a problem – make sure each host family understands how they work.	
Early Sept.	Look for email from the District 5050 RYE Committee re the inbound student's first orientation.	Club Counselor Club YEO Current host family	NB: the Sept. 2016 email went to the Club YEO and Counselor, but not the host family. Ensure the host family has this information. Make sure our student has J-1 visa approved for travel into Canada or travel permissions to enter the US from Canada (may be ESTES) for this end of the month event and subsequent travel during the year.	
Early Sept.	Obtain permission for the US inbound student to travel to Canada on their J-1 visa, or to enter the US from Canada for Canadian students		Necessary to attend the initial orientation session and subsequent events. Permission only needs to be obtained once & lasts for duration of the student's time in the US on this J-1 visa. Permissions vary for Canadian students entering the US, dependent on their home country.	
	Plan to attend the back to school night or other such beginning-of-school events with the student	Student Host family Club Counselor Club YEO	Check with student's school for schedule	
mid-Sept.	Reminder email re need for an in-person home visit to the student's host family is due within 60 days of the student's arrival there.	Club Counselor Club YEO	If the YEO did the initial home visit, the Counselor must do this visit (it can't be done by the same person, per Rotary and US State Dept. rules).	
mid-Sept.	Remind Club members to	Club YEO		

	include the student in activities.		
9/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing. Student should be doing this as well
9/30	Deadline to participate for following school year	Club President Club Board Club RYE Committee	Complete discussion at Board level regarding financial commitment, need for host families, and other elements of a successful exchange program.

OCTOBER			
	Monthly Stipend to Inbound Student	YEO and Treasurer	Ensure that stipend is remitted to student on a regular, monthly basis
	Complete monthly Counselor Report on YEAH Portal	Counselor	
Early Oct.	Dist 5050 Orientation training for inbound students	Student Current host family Dist. 5050 RYE Committee	This is required per Rotary policy 2016 training was held 9/29/16 – 10/2/16 in Coquitlam, BC.
	Outbound recruitment, step 2		-Interview 2-3 applicants & their parents -Make selection by end of October for referral to Dist. Committee -Provide Applicant with online application link http://yehub.net/cgi-bin/W05_get.cgi?pgid=apob0 -Assist applicant with the process, especially the Guarantee Form -begin recruiting host families for next year
	Club's Outbound selection decision is due, Step 3	Club YEO and committee	Provide notice of Outbound Applicant to Dist. 5050 (along with the online long form, but long form is due by Oct 31st)
	Outbound Applicant begins online application Step 4	Applicant and YEO	Email link http://yehub.net/cgi-bin/W05_get.cgi?pgid=apob0 to Applicant, who will enter information, pictures, essays, and agree to rules by electronic signature. After acceptance by District, Applicant is automatically provided a link to a document upload page with instructions to complete forms and obtain a medical exam, transcripts and school recommendation among other items. They will also have the opportunity to select their preference of countries, and any countries they refuse to go to. Applicant will need assistance with outbound Guarantee form which will require signatures of Club President and YEO or Secretary, Parents, and District Chair. Form obtained by Applicant online.
	Check Applicant's progress with online application	Club YEO	
	Remind Club members to include the student in activities.	Club YEO	

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updated: 10/28/16 by Greg Starup

mid-Oct.	Target deadline for completion of 2nd home visit to student's first host family & to submit on-line report	YEO, Counselor or other Rotarian	Must be a Rotarian different than the person who made the first visit and be completed within 60 days of the move-in, per U. S. State Dept. and Rotary rules. The report is submitted through the YEO Portal, https://yehub.net/W05-portal	
mid-Oct.	Email the host families to set the schedule for the year.	Club YEO	Figure out the transition from host family #1 to 2 & from #2 to 3. Discuss holiday plans (Thanksgiving, Christmas, Easter, school breaks, student's birthday). The YEO Guide recommends 12/27 & 4/15 as transition dates.	
10/31	Outbound Applicant's online application is due	Club YEO and Outbound Applicant	Student must have completed gathering all of the required documents and appropriate signatures and uploaded to their specific upload page.	
10/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing. Student should also report	

NOVEMBER				
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Complete monthly Counselor Report on YEAH Portal	Counselor		
mid-Nov.	Remind Club members to include the student in activities.	Club YEO		
	Ensure that 2 nd Host Family is fully vetted	Club YEO	Negotiate move date with both first and second host families. May occur in November or December	
11/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing. Student also reports	

DECEMBER				
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Complete monthly Counselor Report on YEAH Portal	Counselor		
Early Dec	District Holiday Weekend	Student, host families, District	Ensure student's attendance at this District gathering of all students	
mid-Dec.	Remind Club members to include the student in activities.	Club YEO		
Mid-Dec	Dist 5050 interviews for next year's outbound students	D5050 Committee	Dates and place TBD	
mid-Dec.	Student's 1 st of 2 Club presentations	Student Club YEO	This is the first of 2 required presentations to the Club. It should be scheduled for a date sufficiently after the student's arrival that s/he has sufficient English speaking skills to be able to give the presentation. The	

			students are instructed to bring photos from home. The talk should be about their home community.	
12/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing.	

JANUARY				
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Complete monthly Counselor Report on YEAH Portal	Counselor		
	Target deadline for completion of 2nd home visit to student's second host family & to submit on-line report	YEO, Counselor or other Rotarian	Must be a Rotarian different than the person who made the first visit and be completed within 60 days of the move-in, per U. S. State Dept. and Rotary rules. The report is submitted through the YEO Portal, https://yehub.net/W05-portal	
1/15	Report student's schedule to State Dept. (US)	Done through District/WESSEX	Per 62 CFR Sec. 25(n)(2) (Ensure that student and host family information is correct in the YEAH HUB	
mid-Jan	Remind Club members to include the student in activities.	Club YEO		
Late January	YAIL conference	Club	Annual Youth Adventures In Leadership Conference. Exchange students should attend. The conference is open to 10 th & 11 th graders, ages 15 – 17. Club must decide if it wishes to sponsor the student by payment of the fee.	
1/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing.	

FEBRUARY				
	Monthly Stipend to Inbound Student			
	Complete monthly Counselor Report on YEAH Portal			
Feb/Mar	Student must attend the District Ski Weekend	Dist. 5050 RYE Committee Student	The cost has been paid by the District. Student may need help borrowing clothes and equipment	
Feb/Mar	Ensure that 3 rd host family is fully vetted	YEO	Negotiate move date with both second and third host families. May occur in March or April	
Feb/Mar	Recruit a YEO for the next school year.	Club YEO Club RYE Committee	The club YEO ensures that the program operates well at the club level and is in compliance with Rotary and governmental requirements. They should recruit other club members to help carry out the tasks listed below. YEO responsibilities include: -complete the application and training process, including completing an	

		<p>application with 3 references, two on-line Youth Protection training modules, one on-line State Department training module (for US), and a criminal background check.</p> <ul style="list-style-type: none"> -help recruit an outbound student -help orient and support the inbound student -recruit 3 host families, plus 2 backup families. -recruit the student's Rotarian Counselor -shepherd the Counselors & host families through the application and training process. -conduct host family orientation for each host family. -timely submit all necessary reports (host family visit, orientation & student's arrival). -ensure that the school attended by the in-bound student has information for all the responsible Rotary components for their year, including the State Dept. contact, each host family's information, general information about the Club, the Counselor's information, the YEO's information, the District 5050 RYE Committee member information. -contact each host family at least once a month for a check in. Remind each new host family to go over the first night questionnaire with the student. -ensure the student has a way to get to meetings each week, district functions & is introduced to as many Rotarians as possible. -ensure the student has the names and contact information for all important people. -ensure the District 5050 travel guidelines are followed. -ensure the student receives his/her monthly allowance. -correspond with the sending Club each month, so that they know how things are going. -attend District run Counselor and Youth Exchange Officer training sessions. -ensure that the student's visa and DS-2019 [J-1 visa] and plane ticket are correct. -ensure that student's \$500 emergency fund is set up with two signatures required to withdraw money. -ensure that the student has medical insurance in accordance with RI requirements. -arrange for schooling -open bank accounts (personal and emergency). -ensure student attends mandatory District functions such as orientations and District Conference. - stay in touch with host families -ensure the student regularly attends Rotary meetings -ensure the students (outbound and inbound) provide a minimum of quarterly reports, which should include: information on their current hosts, feelings, concerns, ideas and suggestions regarding their exchange 	
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			<p>experience thus far. The YEO should also respond to any irregularities. (this is per Rotary Code of Policies 41.060.6A).</p> <ul style="list-style-type: none"> -ensure the Counselor regularly meets with the student and maintains the contact record. -Report any incidents to Rotary Dist. 5050 Committee and to the State Department. See 62 CFR Section62.25(n)(1) -Report all final academic and semester program participant placements by 8/31 for the upcoming year and by 1/15 for the spring semester. See 62 CFR Section62.25(n)(2). -remember the student's birthday. Do something special. -Verify that the student has written or emailed the monthly report to the Inbound Coordinator. Respect your student's privacy and only read the report if the student requests you do so. The confidential section of the monthly report will be seen only by the Inbound Coordinator and may be used to discuss host family or YEO difficulties experienced by the student." (from District 5050's Guide for YEOs). <p>NB: each Club is supposed to have 3 Youth Protection Certified members (presumably, the three members of the RYE Committee). This includes the Youth Protection Awareness (YPA) training, plus the Youth Protection Certification (YPC), and a Volunteer Affidavit (with an interview and a background check).</p>	
mid-Feb.	Remind Club members to include the student in activities.	Club YEO		
mid-Feb	Re-certify training at yehub.net and complete a new Youth Volunteer Agreement.	All Club RYE Committee participants	Per our Rotary Code of Policies 41.060.16 & District and State Department rules.	
mid-Feb	Provide next year's host families with training & orientation documents	Club YEO	Provide host families with: <ul style="list-style-type: none"> - Rotary Host Family Handbook - Host family application 	
mid-Feb	Schedule each host family for on-line training	Club YEO	- host families must do two on line Youth Protection training modules.	
mid-Feb	Set a deadline for each host family to complete their on line application	Club YEO	Application requires <ul style="list-style-type: none"> - photos of their home - references that need to be checked - background check that needs to be completed - home visit - completion of the on-line youth safety training - orientation by YEO 	
2/28	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing.	

MARCH				
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Monthly Counselor Report entered in YEAH Portal	Counselor		
Early March	Outbound student initial orientation	Outbound student & family Dist 5050 RYE Committee	Outbound student attends 1 day local orientation with their parents. This is required per Rotary Code of Policies 41.060.13.	
mid-Mar.	Remind Club members to include the student in activities.	Club YEO		
3/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing.	

APRIL				
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Monthly Counselor Report entered in YEAH Portal	Counselor		
April	"Review and sign Club Compliance letter to be able to participate in the program the following year."	Club Board Club YEO	This is per the Rotary District 5050 Guide for YEOs, p. 7. Form is provided by the District and submitted to the District Chair	
mid-April	Recruit 2 counselors for our exchange student (1 male & 1 female)		<p>Each inbound student must have a counselor who is preferably of the same gender as the student. The counselor must complete the application and training process, including completing an application with references, two on-line Youth Protection training modules, one on-line State Department training module, and a criminal background check.</p> <p>The Rotary Youth Exchange Handbook describes the counselor's role as follows: "Serving as liaison between the student, Rotary Club, host family, and community at large, the Rotarian counselor plays a crucial role in the success of the Youth Exchange program. The counselor serves as the student's primary Rotary contact, easing his or her transition into the country and the community through regular personal contact throughout the year.</p> <p>The counselor should enjoy working with young people and be prepared to advocate on behalf of the student should any issues arise during the exchange. Members of a student's host family are not eligible. Also, if possible, the Rotarian counselor should not be a close friend or relative of other volunteers involved with a particular student (e.g., school principal or</p>	

			<p>host family).</p> <p>The counselor has the following additional responsibilities:</p> <ul style="list-style-type: none"> -Establishing contact with the student before departure or arrival, explaining the expectations of the Club and the district and maintaining and documenting regular contact (at least once a month). -Counseling the student in matters such as choosing classes, making friends, and participating in activities. -Helping the student adapt to the culture and language. -Working with the community and the student's school to ensure that the student is involved in positive activities and community life -Informing the student about abuse and harassment prevention and creating a supportive atmosphere in which the student feels comfortable discussing any concerns. -Serving as an advocate for the student in any matter. <p>The Rotarian counselor should be trained to respond to problems or concerns that may arise during the exchange, including allegations of abuse or harassment. Counselors should be assigned to every outbound and inbound student in all exchange programs. Outbound counselors prepare students for the exchange and maintain regular contact while the student is abroad.</p> <p>A Rotary handout states the following: "Counselors require more screening and training than the HF [host family]. They must have an approved Volunteer Affidavit, an approved CBC [criminal background check], three approved references, NAYEN training [State Dept. training, I think], and Local Training which is training on your District's Youth Protection Program) and they must complete the Dept. of State Local Area Coordinator Training annually. Additionally, their references and CBC must also be updated annually. If an assigned Counselor is not completely screened and vetted do NOT issue the DS2019 [the J-1 visa].</p> <ul style="list-style-type: none"> -Monthly personal contact with the student (mo. No. 1 must be in person; others may be by phone or email. Contact must be outside of Rotary meetings). -submit a monthly report through the YEAH site that documents the counselor's contact -visit the student at each host family's home within the first or second month of the student's placement there. -have monthly contact with the host family (in person contact in the fall and in the spring). 	
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			Additional counselor roles and responsibilities: <ul style="list-style-type: none"> - occasional unannounced visits to the student in the student's family's home (as in, "I was in the neighborhood and I thought I'd stop by"). NB: in State Dept. parlance, the Counselor is the "Local Coordinator."	
mid-Apr.	Remind Club members to include the student in activities.	Club YEO		
mid-April	Assist student with any going home preparations	Student Club YEO	Help student with end of year plans, including changing dates of return flights, and post-RYE year travel plans. They may want to mail certain heavy items home. Once the student's final flight arrangements have been confirmed, "complete the Departure Form and send it to the Inbound Coordinator." (per Dist. 5050 YEO Guide, p. 21).	
4/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing.	

MAY				
	Outbound recruitment, step 1 (Recommended to begin this process in the Spring, for further recruitment and selection the following fall)	School counselors School principal RYE committee Club Pres. Club Sec'y	-Provide flyer to School (& other area HS?) -Provide short form "intent to apply" -obtain Club's commitment to the financial responsibilities (complete Club Certification)	
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Monthly Counselor Report submitted to YEAH Portal	Counselor		
	Target deadline for completion of 2nd home visit to student's third host family & to submit on-line report	YEO, Counselor or other Rotarian	Must be a Rotarian different than the person who made the first visit and be completed within 60 days of the move-in, per U. S. State Dept. and Rotary rules. The report is submitted through the YEO Portal, https://yehub.net/W05-portal	
	Outbound student receives final orientation	Outbound student	This occurs at the District Conference. The District RYE Committee pays the cost of attending the District Conference	
mid-May.	Remind Club members to include the student in activities.	Club YEO		
mid-May	Obtain name of inbound student & his long form information	Club YEO Dist. 5050 RYE Committee	District 5050 will expect the name of the student's Club Counselor, YEO, and first host family at this time. First host family must be completely vetted in order for student to obtain US J-1 Visa and Canadian Study Permit and TRV. Complete guarantee form in less than 30 days (per Dist. 5050 YEO Guide) as this is also required for J-1.	
mid-May	Provide Dist. 5050 RYE Committee with the name of	Club YEO Dist. 5050 RYE	District 5050 will expect this information to be provided concurrently with their advising the Club of the identity of our inbound student.	

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	the inbound student's Counselor, YEO and first host family.	Committee		
mid-May	Secure enrollment at School for inbound student	Club YEO School principal or counselor	The inbound student will need to provide proof that they have been accepted to a school in order to obtain a US J-1 visa or Canadian Study Permit. The school principal also needs to sign the guarantee form, p. 9 of 13 of the student's long form application. It is titled, "Section F: Host Club, District & School Endorsements."	
Mid-May	Execute Custodian Declaration (Canada)	YEO	Inbound student will need this form in order to obtain Canadian Study Permit and Temporary Resident Visa (TRV)	
mid-May	Obtain background checks for anyone not yet backgrounded.	Club YEO	A Rotary publication states: Carry out criminal background checks for all host family members who are 18 years and older. Background checks must be clean and maintained by the District. Carry out criminal background checks of all volunteers involved in the program. This requirement includes the YEO, Counselor, Club chair, and all Rotarians and their spouses or partners with direct unsupervised contact with the student. <i>Background checks need not be conducted for adults who will have only casual or occasional group interactions with Youth Exchange Students.</i>	
5/30	Send student's home Club an update	Club YEO	Monthly report to update the sending Club on how their student is doing.	

JUNE				
	Monthly Stipend to Inbound Student	YEO and Treasurer		
	Monthly Counselor Report submitted to YEAH Portal	Counselor		
	Complete information on the inbound Guarantee form necessary for the inbound student to obtain his/her Study visa	Club YEO	Need signatures from: -Club President -Club YEO -District Chair -School Official -	
	Help outbound student plan for their year abroad		They will need: - the guarantee form from their host Club (so they can obtain a visa from the country they are going to) - round-trip air ticket (changeable) - travel insurance that meets Rotary's requirements - student visa (equivalent to our J-1 visa) - passport that is valid for at least 6 months beyond the end of their RYE year. - to make contact with their host Club	

			<ul style="list-style-type: none"> - to make contact with their host families (or at least the first one) - use of a credit card to charge things, like their air ticket. - Any information required by the country where they are going. Contact that country's consulate for information. 	
	Complete host family orientation	Club YEO	<p>NB: a student cannot apply for their study visa (J-1 in the US) until this has been done (for at least the first host family)</p> <p>This may be done in a group or 1:1, after each host family's home has been visited & they have passed the background check and their references have been checked. These requirements are per Rotary international and US 62 CFR Section 62.25(k)</p> <p>Have each family sign the host family orientation form (document is titled, "WESSEX Host Family Orientation"). Scan and send that form to District Inbound Coordinator, or submit report to YEAH Hub (open the host family's name, go to the documents tab, choose "upload new", select HF Orientation as the document type, and complete)</p>	
mid-June	Remind Club members to include the student in activities.	Club YEO		
mid-June	Student's final presentation to Club	Student Club YEO	This is the student's "thank you & farewell" presentation	
mid-June	Plan final good-byes for the inbound student, including a farewell party.	Club YEO Host families	Do exit interviews with the student and the host families.	
6/30	Send student's home Club an update (final report)	Club YEO	Monthly report to update the sending Club on how their student is doing.	

KEY to abbreviations

Club: Local Rotary Club

RYE: Rotary Youth Exchange

RYLA: Rotary Youth Leadership Awards (for 18 – 30yo)

SEVIS: Student & Exchange Visitor Information Program (the US Dept. of State's system of record).

TRV: Temporary Resident Visa (Canada)

YAIL: Youth Adventures in Leadership

YEAH: Youth Exchange Administrative Hub

YEC: Youth Exchange Committee

YEO: Youth Exchange Officer

Outbound student Budget

Approximate Amounts	For	Paid by
\$700	District Participation fee	Student
\$800	Travel insurance	Student
\$500	Cash emergency fund	Student
\$2500	Round trip air ticket (changeable)	Student
\$600	Visa fees	Student
\$250	Host family gifts	Student
\$75	Blazer	Student
\$250	Clothes for year abroad	Student
\$2000	Post-RYE travel opportunities	Student
TOTAL	\$7675.00	

Club Budget

NB: the daily costs for a student are borne by each host family: food, extra clothing, ticket costs, etc. Students are not permitted to work while in Canada or the US, so the student's ability to cost share is limited. The Club may help the outbound student fund raise, by sponsoring an event or "passing the hat".

Approximate Amounts	For	Paid By
\$110/mo. x 11 mo (minimum) \$1210	Monthly allowance	Club
\$400	Incidentals, such as school sports fees, ASB fees, etc.	Club
\$1,900	Club Participation fee to District	Club
\$50/Mo X 11 Mos \$550	Bus Pass	Club
\$50/Mo. X 11 mos \$550	Cell phone	Club
\$15 X 40 weeks \$600	Cost of weekly lunches at Rotary meeting	Club
\$250	Gifts	Club
Approximate total	\$5,460	