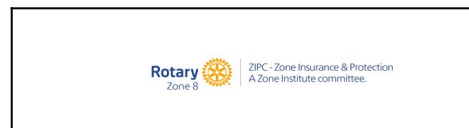


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Rotary Youth Exchange

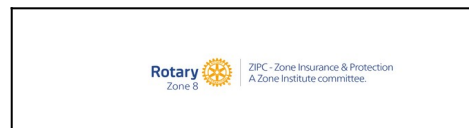
2023-2025 Plan for Oceania

RI Policies, Insurance, Risk and Crisis Management

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Overview

A joint meeting¹ of the Oceania DG train, RYE Chairs and the Zone 8 Insurance and Risk Management Committee Oceania Districts Insurance Officers on re-start of RYE in New Zealand reviewed:

- the various RI policies and **new** 2023 RYE Long Term Application forms, and
- changes in law relating to the Ministry of Education Exchange Programme from late 2021, and
- the 2023-2024 RYE DG Certification requirements and in particular the insurance and risk management issues as checklisted in that document, and finally
- the changes to the New Zealand Privacy laws in 2020, in particular the requirement to comply with the Health Information Privacy Code.

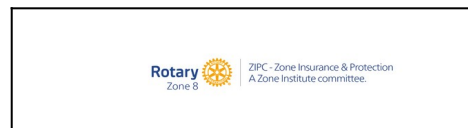
This paper sets out the documents now required to be used for the RYE programme.

There is working progress remaining on ensuring that learning and development follows and that the storage of records is fully secured. Those standards will put us in the position of having Police level security on records such as Health information and the IT changes to our systems.

As an authors note, like everything in Rotary this work is the result of many hours of dedicated time on behalf of all involved, including the DG train for the 5 District, the Insurance Officers, the RYE chairs the Oceania ICT team, the ROZops team and many more. **Thank you to all for your time and efforts.**

¹ That meeting was at 16:00 hours NZT on 1 March 2023 on Zoom1 and was recorded.

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Preliminaries – liability issues for abuse offences against children at law in New Zealand

As a generalisation, the law in New Zealand relating to injury or harm is unique in the world and governed by state compensation and other schemes to redress harm, but outside the Court system.²

NZ mandatory state compensation scheme- “ACC”

In New Zealand, in nearly all cases³, Court proceedings by a victim that has sustained physical or mental harm, whether a result of a crime or an accident, is barred by the Accident Compensation Act 2001.

The principle crime or civil right to sue, in many jurisdictions is referred by the generic term of ‘*molestation*’.

There is no specific crime or offence or right of action for ‘*molestation*’ in New Zealand.

In fact the reverse is true. In New Zealand, other than in the Family Proceedings Act which enables a party to obtain a NON-molestation order, ‘*molestation*’ is not an actionable offence or civil wrong.

However, New Zealand does have crimes against the person that relate to ‘*molestation*’, principally “*sexual violation*” and “*harassment*” and some specific crimes relating to family violence and children, where children have specific rights.

Sexual violation is the relevant crime and is addressed under Section 128 of the Crimes Act.

This term **sexual violation** is unique to New Zealand.

The concept of the offence is much broader than the terms used in other countries.

Sexual violation relies on the definition of a ‘sexual connection’⁴. This term is very wide in scope. It can loosely be described as broadly including **any** form of physical sexual act by one person on another by **any** means without consent. Rape is a form of sexual connection. So is any form of sexual physical act with any part of another persons body whether by the assailants body or any object. The key focus is therefore is there a ‘sexual connection’.

2 So unique that an upcoming book of 328 pages is devoted to explaining the differences by comparing Australian and New Zealand law - “Children, the Law and the Welfare Principle Perspectives from Australia & New Zealand” – refer <https://www.routledge.com/Children-the-Law-and-the-Welfare-Principle-Perspectives-from-Australia/OHalloran/p/book/9781032542157>

3 See the comments below in the section Nuanced Issues on the possible actionable causes.

4 See Section 2 of the Crimes Act – Interpretation to be found at <https://www.legislation.govt.nz/>

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Sexual violation is a CATEGORY 3 offence due to the **maximum** penalty of 20 years imprisonment⁵.

The limitation period is set by a different Act - the Criminal Procedure Act, 2011.

Prosecution is started by the Police filing a charging document.

As this is a CATEGORY 3 offence, with a penalty of more than 3 years, a charge can be filed at any time as **there is NO limitation on the time for filing a charge in New Zealand for such offences.**⁶

On the rights relating to civil redress as injury, whether physical or mental, as noted above, is a matter that can be raised as a claim under the Accident Compensation Act 2001.

That Act sets out the state scheme is part of our 'insurance'.

It is **not possible** to opt out from that scheme.

It is also not possible to take proceedings outside New Zealand in relation to an act that has occurred in New Zealand. So even if such proceedings were brought outside New Zealand, no judgement can be enforced in New Zealand for an 'injury' that that is covered by the scheme.⁷

For Rotary youth programmes, accident compensation is the key form of indemnification for any affected youth.

These benefits extend to visitors, such as Rotary Youth Exchange students.

There are exceptions for overseas residents temporarily here in New Zealand as 'seasonal workers'. However in those cases the risk is covered in the work visa by requirements for special insurance.

For Rotary Youth Exchange students, under the Memorandum of Understanding with the Ministry of Education over access to free enrolment in state schools⁸, there are some special requirements which are set out below.

It is very important for us as Rotarians in New Zealand to understand that the issue of how this scheme with the Ministry of Education and our other forms of assistance work.

The first point is that this scheme in New Zealand, as it applies to RYE Inbound students, is not obvious to people in other countries.

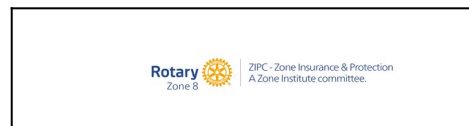
⁵ To be a CATEGORY 3 offence the maximum penalty must be more than 3 years imprisonment.

⁶ Note the Police do have the discretion to decide that the circumstances warrants a charge of sexual violation being brought.

⁷ The courts of the country of the original court have no jurisdiction Section 6 (1) (b) of the Reciprocal Enforcement of Judgments Act 1934

⁸ This is discussed further under the section titled "Nuanced Issues".

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Many RYE Chairs in other countries will naturally refer to their own countries laws and the concepts of protection and assistance in their home jurisdictions.

Covering these issues can be challenging. If questions are raised by overseas RYE Chairs those should be answered with the assistance of the District Insurance Officer.

This may seem to be a contradiction (why involve insurance officers) but as further explained below there are some grey areas (referred to as '*Nuanced Issues*') where, in dealing with an issue involving youth (minors), resident in New Zealand and attending a state school.

Consequently we may need to have assistance from our insurers on any event that gives rise to a claim by the visiting student.

Summing up the situation in New Zealand

Before addressing the ***Nuanced Issues*** here is a statement in bullet point form, which sums up the initial approach:

- injury in New Zealand is covered by a special state agency established under Accident Compensation Act 2001
- there is no right to sue for 'injury' or 'accidents' in New Zealand.
- visitors to, and children and non-earners in New Zealand are covered by this programme but ACC and medical service providers may have a right to claim against an overseas students insurance for costs not covered by ACC – primarily 'sickness' rather than 'accidents'.
- with the exception that overseas students must have there own medical insurance for sickness, no premiums are paid by visitors and generally funding is by levies on employers and taxes for injuries or accidents
- victims of crimes can also be separately compensated by an order against the perpetrator for 'reparations' on sentencing and also state aid through a special tribunal established under the Victims' Rights Act 2002
- finally the issue may come up about 'historical' claims given that there is no limitation period for sexual violation claims. This issue is addressed in 3 parts. First, claims under Victims' Rights Act 2002 require a conviction. Secondly, claims under the Accident Compensation Act 2001. The Accident Compensation Act 2001 is part of successive legalisation that runs back to 1 April 1974⁹. In insurance terms that is the retro-active date. A claimant would have to have sustained the 'injury' over 49 years ago. Thirdly, and finally, the Royal Commission on Abuse in

9 See Section 359 **Injuries suffered before 1 April 1974** - (1) This Act does not confer cover in relation to an injury suffered before 1 April 1974.

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Care¹⁰ does have powers to admit claims for historical abuse for children in state care but only in state care cases. That obviously is a very unlikely circumstance in relation to a Rotary student.

The Nuanced Issues

Punitive or exemplary damages

Whether a victim molestation can pursue the wrongdoer's employer or an organising entity in the case of a student programme, such as a school, home host (a 'residential caregiver') or NGO or community organisation, for punitive or exemplary damages is a controversial question.

If the arguments relating to vicarious liability are accepted in New Zealand, then civil claims for sexual abuse will only be able to be brought against the other party, if some other wrong has been committed.

Examples are breach of a law (statutory liability) or breach of some contract based commitment. This is why it is very important that our home hosts, who are under the MoE agreement "residential caregivers" are contracted through our multi-District Rye programme manager, ROZ Youth Programmes Limited.

Having noted the above such possible forms of action are legally difficult.

The key for Rotary is to ensure that we follow and apply our own policies and the law imposed by the MoE agreement for us to be an approved Exchange Programme Organisation as set out on the MoE's website¹¹.

Those policies and other documents, are written to ensure that youth in our programmes are protected.

The policies may seem stringent but that is for everyone's benefit, including members of Rotary, in whichever programme or club, each of those involved have been through the right vetting and training and observe the policies/rules.

In short, observing our policies and Codes is not optional!

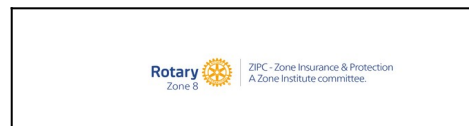
The peril of dual cover – Rotary Youth Exchange students insurance

As noted above, Rotary Youth Exchange students are, by virtue of Rotary International rules for exchanges, required to carry medical cover insurance for the period of their stay.

¹⁰ <https://abuseinquiryresponse.govt.nz/ma-nga-purapura-ora-for-survivors/>

¹¹ See <https://www.education.govt.nz/school/student-support/secondary-school-exchanges/exchange-programme-organisations-epos/>

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Furthermore under the agreement with the Ministry of Education (MoE) to admit students to state schools with 'free' tuition,¹² Rotary', through our required Exchange Programme Organisation (EPO) manager, ROZ Youth Programmes Limited, takes on the **part of** the obligations of the education provider under the Educations and Training Act 2020¹³.

A key concept to take on board is that we partner with the school, who is the primary EPO in taking on the role set out in Code required of EPO in relating to 'residential caregivers' – in our terms our host families.

Returning to insurance, the EPO Code **also sets out various insurance requirements**¹⁴.

It is a key principle in insurance law and policy wordings, that if there are dual covers for the same risk then the insured (in this case the Rotary Youth Exchange student) must make such claims as can be made under any 'other' cover available to the 'insured'.

The question asked is *"what is the effect of the agreement with the MoE to take on the schools obligations and crucially does that include medical insurance to the exclusion of the students rights, as a visitor, to be covered by the ACC scheme?"*

To answer that question it is noted that:

1. that the ACC scheme is not an insurance cover.
2. however the ACC regime does cover visitors for accidents¹⁵
3. but visitors still need to have travel insurance to cover illness and other travel risks¹⁶
4. New Zealand has immigration regulations that cover those that are granted student visas residency¹⁷. ACC cover is not excluded under the visa.

¹² See the included document "ROZ Youth Programmes Limited - Offer of Place at School MOU"

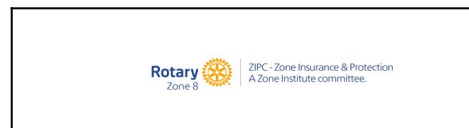
¹³ Rotary is an 'EPO' an approved Exchange Programme Organisation – for more detail visit <https://www.education.govt.nz/school/student-support/secondary-school-exchanges/exchange-programme-organisations-epos/#List>

¹⁴ Conflicts between the different requirements are referred to ZIPC for review and if necessary to our appointed broker, AON

¹⁵ Our no-fault scheme covers everyone, including visitors, who are injured in an accident in New Zealand. - <https://www.acc.co.nz/im-injured/what-we-cover/>

¹⁶ ACC advice to visitors "You still need travel insurance - Make sure you buy travel insurance before your visit because we don't cover: (a) illness (b) disrupted travel plans or emergency travel to get you back home (c) injuries while in transit to or from New Zealand. This includes getting on or off a boat or plane travel around New Zealand in the craft you arrived in, for example, a cruise ship (d) treatment and rehabilitation when you get back home. - ref: <https://www.acc.co.nz/im-injured/what-we-cover/if-youre-a-visitor-injured-in-new-zealand/>

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5. Finally, and most importantly, the MoE agreement requires Rotary to discharge the schools obligations “*Provision of accommodation compliant with the **Code of Practice for the Pastoral Care of International Students***” – this code is part of this document as an Appendix.

The Pastoral Care of International Students Code is key to Rotary’s obligations, but is limited to the accommodation and insurance sections of the Pastoral Care of International Students Code.

Those obligations are set out in the Pastoral Care of International Students Code¹⁸ Section 76 relating to Accommodation is reproduced below.

76. Process 5: Accommodation

(1) In relation to an international school learner under 18 years who is in the care of a residential caregiver, the signatory must –

(a) ensure that the learner’s accommodation is safe, is in acceptable condition, and meets all regulatory and legislative requirements; and

(b) ensure that the safety check referred to in clause 77(1) is completed and is up to date; and (c) ensure that an appropriate check is completed and is up to date for each person who is 18 years or over and who resides at the residential caregiver’s accommodation, for the purpose of ensuring the safety of the learner; and

(d) have a written agreement with the residential caregiver that specifies the role and responsibilities of each party in relation to the care of the learner; and

(e) maintain effective communication with the learner and the learner’s parent or legal guardian when accommodation issues arise, and must take responsibility for addressing those issues, including reporting them to relevant authorities and moving learners to appropriate accommodation; and

(f) conduct sufficient learner interviews and home visits to monitor and review the quality of residential care, taking into consideration the age of the learner, the length of the stay, and other relevant factors; and....

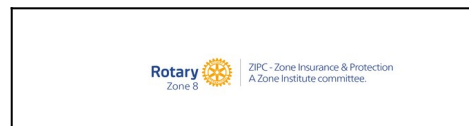
(further sections provide detail on process)

Excerpted from the Pastoral Care of International Students Code 2021

17 <https://www.immigration.govt.nz/assist-migrants-and-students/assist-students/education-in-nz/making-an-offer-of-place>

18 Section 21(c) on page 10.

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Negligence – advice and the Pastoral Care of International Students Code¹⁹ obligations

Another risk, which we can mitigate if we follow our own policies, is giving any affected party bad advice or failing to follow the requirements under the Pastoral Care of International Students Code.

Examples are:

- we do not have to follow the Pastoral Care of International Students Code – we have our own processes – **WRONG** – the whole programme depends on following the code requirements in relation to home hosting
- we do not have to report any allegation to the Police or other state authority – **WRONG** – WE DO – SEE OUR POLICIES
- a visiting child does not need to make a claim on ACC – **WRONG** – IF THERE IS ANY QUESTION OF AN INJURY WE DO – CHILDREN UNDER 18 can be denied a claim if they fail to lodge that claim while a minor²⁰
- ACC does not provide cover for mental harm – **WRONG** – it does – there is a special claim process²¹

The bottom line

We have a comprehensive programme in New Zealand for protecting youth.

We have well-researched and documented Rotary International policies for protecting youth and reporting any incident.

As chartered Rotary entities and members we are bound by those policies and any incident requires 2 things.

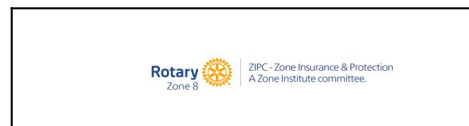
1. following the Rotary policies and processes and
2. ensuring that the risk is managed by Rotary both through RI and your Insurance team.

19 See The Education (Pastoral Care of International Students) Code of Practice 2021.pdf which is attached in an appendix to this document

20 <https://www.1news.co.nz/2020/09/27/dreadful-acc-loophole-preventing-child-sexual-abuse-victims-from-qualifying-for-weekly-compensation/>

21 <https://communitylaw.org.nz/community-law-manual/chapter-19-accident-compensation-acc/when-youre-covered-by-acc-and-when-youre-not/sexual-abuse-cover-for-resulting-mental-harm/>

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Overview for RYE Zone 8 – Oceania work programme

The basis of the work are:

- the requirements of RYE program - as set out on the Rotary.org website (snapshot²²), and
- the detailed comments made by the RI RYE team which have been reviewed and incorporated into the key documents, and
- the changes in New Zealand law since 2019 as outlined in this document.

How to ensure student safety and manage risk

The district Youth Exchange officer, youth protection officer, and district governor prepare for and manage risks, including political unrest, natural disasters, crime, injury, and health concerns.

- Visit the [Youth Protection page on My Rotary](#)
- Download the [Rotary Youth Protection Guide](#) (PDF) to learn about responsibilities when working with young people, including policies on student safety and risk management.
- Review the Youth Travel section, listed under 2.120.3, in the [Rotary Code of Policies: Youth Travel Excerpts Reference](#) (PDF) if students will travel during an exchange.
- Encourage club members and host families to take the online course [Protecting Youth Program Participants](#) in the Learning Center.
- Report any incident or concern to Rotary International's Youth Exchange staff at youthprotection@rotary.org.

²² <https://www.rotary.org/en/our-programs/youth-exchanges/details>

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RYE Oceania Stakeholder and Actors Diagram

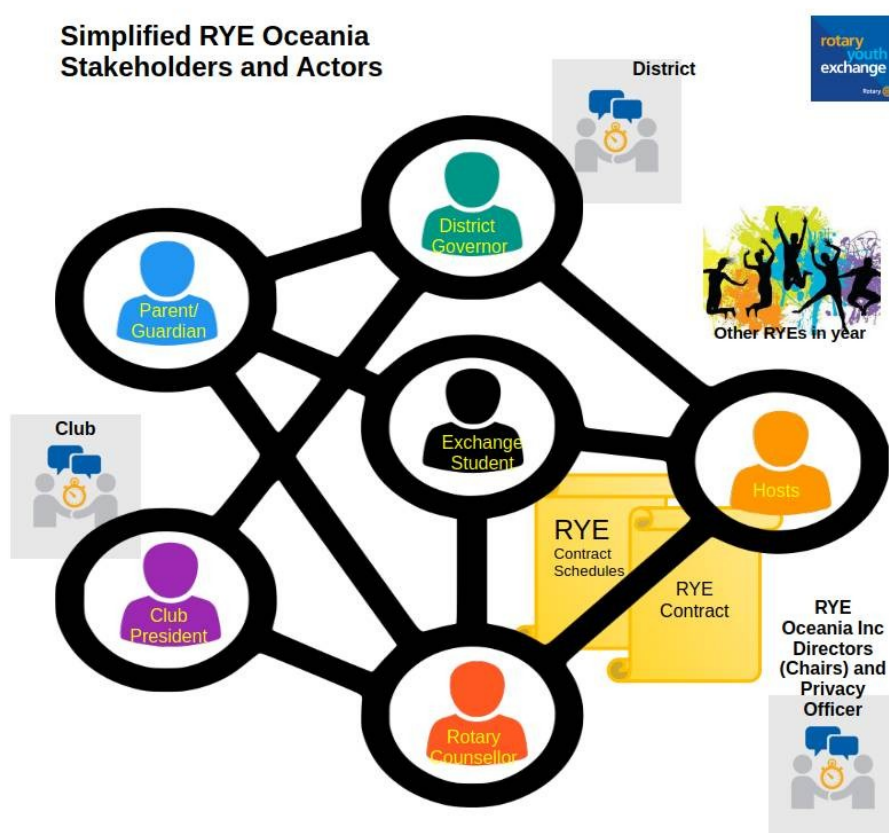
NZ Government



List of Actors

- 1) RYE NZ Hosts
- 2) RYE Oceania Directors/Chairs and Privacy Officer
- 3) RYE Parent/Guardian
- 4) Rotary Counsellor
- 5) Rotary Club President
- 6) Rotary District Governor
- 7) Rotary District YPO
- 8) Rotary Volunteers
- 9) Rotary Reserved Temporary Guardian
- 10) Rotary Reserved Temporary Legal Representative
- 11) Rotary Oceania DIOs
- 12) Rotary Insurers
- 13) Rotary International RYE team
- 14) School Counsellor

Simplified RYE Oceania Stakeholders and Actors



The list of stakeholders and actors will be familiar to New Zealand Rotarians.

This document is an adjunct to the reference documents listed in Appendix 8 but specifically the Rotary International documents and resources referred in:

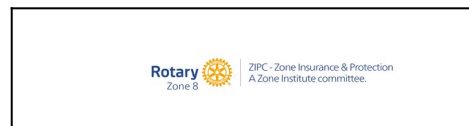
1. the Rotary Youth Exchange Handbook – 746_youth_exchange_handbook_en.pdf
2. the RI Youth Protection Guide 2019 - RI Youth Protection Guide 2019.pdf
3. several Rotary International Learning Centre courses of youth, privacy and harassment.
4. the RYE Student application form – now updated from the RYE conference in Melbourne in 2023

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5. the ROZ Youth Programmes MOU between the Clubs and Districts as stakeholders.
6. The requirement for a formal agreement between the host parents and our programme manager ROZ YOUTH PROGRAMMES LIMITED – required by the The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021
7. the RYE students travel insurer
8. the Rotary Oceania insurance programmes covering:
 - Rotary International
 - our Districts and Clubs
 - our programme manager ROZ YOUTH PROGRAMMES LIMITED
 - the host parents

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RYE Oceania Insurance & Risk Management Diagram

Rotary Oceania Insurance 2023

Liability, Travel and Other Covers For Youth Programmes

The covers for the Rotary companies, specifically, Rotary Oceania include general and public liability but are integrated with the G/PL master policy.



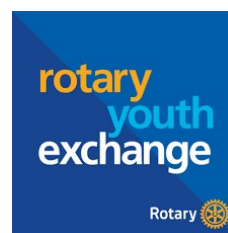
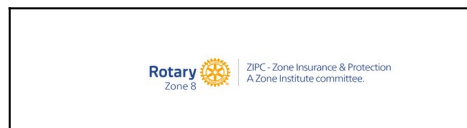
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Actions Required – Project Plan Tasks

#	Task	Allocated to	Resources/Approvals
1	Task Force Leadership Team – Chair and Members (a) ZIPC nominees (2) (b) RYE (9910, 9920, 9930) (3) (c) DGE Representatives (2) (d) Operations Support (1)	DGEs	DG Train DONE March 2023
3	Finalise Youth Protection Policy for New Zealand	Task force	Broker Insurer ZIPC Oceania RI/RYE DONE
4	Amend RYE “RYE full_application MASTER 2012.docx” to ensure separation of controlled sections and finalise	Task force	DONE RYE as announced and published in June 2023
5	Finalise Advisory to Schools	Task force	DONE
7	Data Protection – HIPC	Task force	ROZ Youth Programmes Limited DONE
8	Insurance – resubmit finalised RI/RYE policies to insurer for GL via broker	ZIPC Oceania Subcommittee	Insurer for Z8 Rotary Oceania RI/RYE – DONE
9	Incorporate ROZ Youth Programmes Limited and register for GST and with Charities	ROZops and NZRCCT Advisory Trustees	ROZops - DONE
10	Add ROZ Youth Programmes Limited to ROZops Limited D&O as a named party	ZIPC Oceania Subcommittee	ZIPC Oceania - DONE
11	ZIPC to seek terms for RYE Student Travel Cover which complies with RI/RYE requirements	ZIPC Oceania Subcommittee	Broker Responding Insurer – DONE DELEGATED TO DISTRICT RYE CHAIRS

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	100
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



#	Task	Allocated to	Resources/Approvals
12	Approval of ZIPC	ZIPC	Via David Tolstrup ZIPC Chair- DONE 2023
13	DRAFT the MOU between ROZ Youth Programmes Limited, the Club and District	Task force	Based on the Rozevents MOU – primarily cites RYE Application form as basis of agreement - DONE
13	Submission to RI/RYE	Task force	Task force Chair with DG train, RYE Chairs, ROZ Youth Programmes Limited Directors and ZIPC Oceania DONE 2023
14	Post approval communications	DGEs, RYE Chairs and Task force	DONE

Note: in the DG train, NZ DIO, NZ RYE Chairs meeting on Zoom on 22 March 2023 this action plan was agreed. Minutes have been drafted and circulated for comment and approval by the DG's and DGEs.

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
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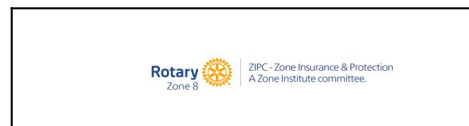


APPENDIX 1 - FAQs

FAQs -to be posted on rotaryoceania.zone forum

Question	Answer
Please explain how the documents relate and work?	<p>In 2019 RI issued 2 key new guides on Youth Protection and Youth Exchange.</p> <p>The Youth protection guide required adoption of a youth protection policy. That is set out as a template in the guide.</p> <p>Additionally, there is a standardised Volunteer form and Abuse and Harassment Policy.</p> <p>District Governors in 2020 were required to take the youth protection policy and have the local law added to that policy.</p> <p>That was DONE.</p> <p>The RYE Guide added to those requirements but the foundation was the Youth protection policy.</p> <p>In particular the RYE Guide added certification requirements and the requirement for a Crisis Management Plan to be integrated into the youth protection policy.</p> <p>All of those documents are now in place with templates and available for download from the Members Centre webpage</p>
Okay but simply what steps are necessary for a Club to participate?	<p>Here are 7 simple steps:</p> <ol style="list-style-type: none"> 1. For inbound students find volunteers to both support (several roles) and host 2. For outbounds find candidates 3. for all start with the Volunteer application 4. Arrange training and certification with your District. Especially the RYE Chair, DG and Youth Protection Officer 5. engage your DIO (District Insurance Officer) so your DIO can ensure that the required insurance is in place

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
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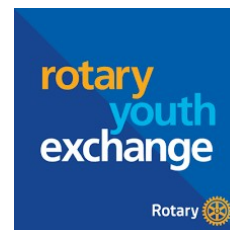
Question	Answer
	<ol style="list-style-type: none"> 6. send your team to training – liaise with the District Learning and Development Officer 7. get your Club MOU with your District and ROZ Youth Programmes Limited signed
What other resources are available?	This answer to be entered in the forum is the list of the resources with links to the documents
There used to be flow charts for RYE Committees to follow – has that been updated?	NO The old process diagrams cannot be used.
There were other document templates – where can I download those documents?	<p>The youthexchange.org.nz site is being re-worked. The public documents are now in place with templates and available for download from the Members Centre webpage</p> <p>You will need extra permissions to have access to 'controlled' or none public documents.</p>
As an RYE Chair of Co-ordinator what do I need to put everything together for a student?	<ol style="list-style-type: none"> 1. Use the 2023 new RYE application forms 2. get your Clubs and for NZ inbounds their Host families sorted 3. once applicants are selected for both Outbounds and Inbounds ensure they are entered in the database at rotaryyouthexchange.org.nz 4. for Inbounds you need to have vetted Clubs, Host parents and an offer from schools 5. ensure that everyone has the right qualifications and has completed the necessary checks and courses and signed the required documents 6. if not an approved travel insurance programm, check insurance with the ZIPC Insurance team (file a Helpdesk ticket through rotaryyouthexchange.org.nz) to ensure that the students travel insurance meets the RI requirements 7. track and report as required -the exchange student, the hosts, the Club, the School and finally the allocated Counsellor 8. update the student's record when moving hosts

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	100
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team





Question	Answer
	9. close the exchange year

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	100
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APPENDIX 2 – RI Youth Protection Policy

2023 updated Youth Protection Policy – Zone 8 - Oceania

	<p>DISTRICT YOUTH ACTIVITIES WELL BEING POLICY (YAWP) FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES</p> <p> <small>Don't just share. Share wisely.</small></p>
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Operative Date: 1 April 2023 – Last update – 21 March 2023

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WELL BEING POLICY (YAWP)
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DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
FOR TERRITORIES
WHERE NEW ZEALAND LAW APPLIES

**This policy is the 2019
Rotary International Policy
reviewed by District Solicitors
and adapted to include references to New Zealand law.
The sections in blue are the policy statements
that apply to Districts certified
to participate in the Rotary International
Youth Exchange Programme**

1. Rotary International Statement of Conduct with Youth

Rotary International Zone 8 - Oceania - NZ territories strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotarians, Rotarians' spouses and partners, and other volunteers must safeguard the children and young people they come into contact with and protect them from physical, sexual, psychological and emotional abuse.

2. Definitions¹

Rotary Youth Exchange or RYE – a programme of Rotary International Districts that are certified as permitted participating Districts.²

Volunteer — Generally, any adult involved with Rotary youth activities who interacts directly with youth, whether supervised or unsupervised. A paid staff member that is involved with youth is excluded from this defined term as such adults, if employed to work with youth must be current with the required safety check as set out in Children's (Requirements for Safety Checks of Children's Workers) Regulations 2015.

For Youth Exchange, volunteers ("RYE Volunteers") specifically included as those interacting with Youth are:

- Club and District Youth Exchange and/or Protection officers and the members of their respective Club or District organising committees;
- Rotarian counsellors;
- Rotarians and non-Rotarians and their spouses and partners who interact with students during activities or outings or who transport students to events; and finally
- host parents and other adult residents of the host home, including host siblings and other family members.

Youth — has the same meaning as "child" in Section 15(1) of the Children's Act, 2014 and any amendment to that definition .

1 This is a limited definitions list – for any term in this document that may benefit from further information as to its use by Rotary International refer to the Rotary International Code of Policies as published from time to time. As at the operative date that document is [code_of_policies_rotary_international_en 2020.pdf](#) and is available for download from www.rotary.org

2 The Rotary Youth Exchange section in the Rotary International Code of Policies is set out at page 294 article 41.070.

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
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Youth program participant — Anyone who participates in a Rotary youth program, whether child or adult.

Youth Protection Officer — refers to that person, appointed by the District Governor that has satisfied the District Governor that they have professional experience in counselling, social work, law, law enforcement, or child development, and may or may not be a Rotary member.

3. Incorporation and Liability Insurance

The Zone 8 - Oceania - NZ territories youth program(s) are part of a separate legal entity known as ROZ Youth Programmes Limited³. This entity has been formed under the laws of the country of New Zealand, is in good standing, and registered both as a company under the Companies Act and as a charity under the Charities Act.

As required by Rotary International as a Rotary Youth Exchange participating District, ROZ Youth Programmes Limited carries liability insurance with appropriate coverage and policy limits. This policy protects the organization from third-party claims and lawsuits alleging negligence by the organization, its employees, or its volunteers.⁴

4. Club Compliance

The District Governor is responsible for supervision and control of all youth activities in the district, including those associated with Rotary Youth Exchange. Zone 8 Oceania will monitor all participating clubs and ensure that they comply with youth protection and Rotary Youth Exchange certification requirements.

All clubs that participate in Rotary Youth Exchange must provide the district with a copy of the following for review and approval:

- A signed compliance statement that the club is operating its program in accordance with Zone 8 - Oceania - NZ territories and Rotary International policies
- Confirmation that volunteers will be prohibited from contact with program participants until a the clearance processes set out below have been conducted and clearance for unsupervised contact with program participants has been issued by the District Youth Protection Officer
- All club materials that advertise the Youth Exchange program, including brochures, applications, policies, and websites which are unique to the Club. Materials supplied by the District should be used and no confirmation is required so long as those materials are used as provided by the District.
- List of services in the area (rape and suicide hotlines, alcohol and drug awareness programs for teenagers, relevant law enforcement agencies, community services, private services, etc.) unless the Lists to be used are those provided by the District.
- Any club youth-protection training materials if different from those provided by the District.

³ This company is owned in trust for the Districts, Clubs and Rotarians of Zone 8 Oceania with the controlling shareholder being the New Zealand Rotary Clubs Charitable Trust

⁴ Rotary International Code of Policies article 41.070.4

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
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5. Volunteer Selection and Screening

All Rotarian and non-Rotarian volunteers interested in working with youth program participants must meet Rotary International and Zone 8 - Oceania - NZ territories eligibility requirements.

Rotary International prohibits the membership and participation of any volunteer who has admitted to, been convicted of, or otherwise been found to have engaged in sexual abuse or harassment.

If a person is accused of sexual abuse or harassment and the law enforcement investigation is inconclusive, or if law enforcement declines to investigate, additional safeguards are necessary to protect any youth program participants with whom the accused may have future contact, as well as the accused. A person later cleared of charges may apply to be reinstated as a youth program volunteer. Reinstatement is not a right, and reinstatement to him, her or their former position is not guaranteed.

All Youth Exchange Rotarian and non-Rotarian volunteers that have direct, unsupervised contact with program participants must:

- Complete a volunteer agreement form as provided by Zone 8 - Oceania - NZ territories.
- Undergo a New Zealand Police Vetting Service check using the form available at (the current location) <https://www.police.govt.nz/advice/businesses-and-organisations/vetting/forms-and-guides>⁵
- Be interviewed, preferably in person.
- Provide, if requested then on request, a list of personal references with contact information (it's recommended that references include no family members and no more than one Rotarian)
- Comply with Rotary International and district guidelines for the Youth Exchange program

Youth Exchange host families must additionally satisfy the following requirements:

- answer, in an interview, questions on

⁵ New Zealand Police vetting require two forms of ID, for most people an NZ drivers licence and passport. A number of other forms are also acceptable and are listed on the NZ Police website.

2. A copy of the two forms of ID must be certified by a suitable person as matching the person presenting them. The correct wording is on the form. This is not the same as lawyers or JPs usually certify documents.

The police vetting process for working with young people is not about the document, but the confirmation from the document of the identity of the person, which is a crucial distinction. You don't need a lawyer or a JP as such to do this, just someone who is a member of a professional body such as engineers, doctors, accountants etc, religious or community leader, president or officer of a Rotary Club or pretty much anyone of some standing in the community or in business.

**DISTRICT YOUTH ACTIVITIES
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- their understanding of the requirements for the safety and security of students
- their objectives in hosting a student and how those objectives are consistent with Rotary ideals of international understanding and cultural exchange
- their ability to financially and operationally provide adequate accommodation and meal support for the student
- their ability to provide appropriate supervision and parental responsibility that ensures the student's well-being
- Complete a written application
- agreement to accept home visits with and without notice, both before and during the placement and that home visits conducted at least annually, even for repeat host families
- ensure that all adult residents of the host home meet all selection and screening guidelines. This includes adult children of the host family and other members of the extended family or household staff who are full-time or part-time residents of the home.

Youth Exchange students must be appointed a Rotarian counsellor who meets the criteria for all volunteers. Also:

- A counsellor must not be a member of the student's host family.
- A counsellor must not hold another role of authority with respect to the student's exchange (e.g., school principal, Club President, District Youth Exchange chair or Club Youth Exchange officer).
- Counsellors must be suitably qualified, able to respond to any problems or concerns that may arise, including instances of physical, sexual, or emotional abuse or harassment.

6. Youth Exchange Participant Selection and Screening

All students and volunteers interested in the Zone 8 - Oceania - NZ territories Youth Exchange program must meet district guidelines and:

- Complete a written application
- Be interviewed at the club and district levels
- Attend and participate in all club and district orientation and training sessions

All parents or legal guardians of Youth Exchange participants must also be interviewed at the club or district level to determine the student's suitability for program participation.

7. Learning and Development Qualification

Zone 8 - Oceania - NZ territories and member clubs may provide youth-protection learning and development open to all participants in Rotary youth programs. Rotarians and Rotaractors may, at the direction of the District Governor⁶, qualify to be Volunteers by completing courses in the Rotary Learning Centre. Non-Rotarians and non-Rotaractors, who

6 41.070.1. District Governor Authority Each governor is responsible for the supervision and control of the Youth Exchange program within the district. The district Youth Exchange officers, or committees, are under the supervision of their respective governors and should report to them.

**DISTRICT YOUTH ACTIVITIES
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do not have access to the Rotary Learning Centre may be requested to attend a briefing or learning workshop with one of the District's Youth Protection Officers

In relation programmes other than RYE, one of the District's Youth Protection Officers or a Rotarian or Rotaractor that is designated as qualified to provide briefings or learning workshops, will conduct the briefing or training sessions.

In particular, the Zone 8 - Oceania - NZ territories Youth Exchange program must provide youth-protection learning and development and information to all students and volunteers.

Specifically, Zone 8 - Oceania - NZ territories has in this YAWP and its Youth Exchange Programme manuals

- Adapted Rotary's Youth Protection Guide to reflect district guidelines, information on local customs and culture, and legal requirements
- Developed a learning and development schedule that specifies who will be qualified, how often, and how the requirements are both delivered and recorded against those required to be qualified.
- The persons required to be qualified for those involved in Youth Exchange, are the:
 - the District Governor and Governor-Elect
 - the District Youth Exchange officers and committee members
 - any Club Youth Exchange officer and Committee members
 - all Rotarian counsellors
 - the District's Youth Protection Officer(s)
 - RYE Volunteers
 - other Rotarians and non-Rotarians who participate in Youth Exchange organised activities, such as local tours or district events
 - Host families
 - Students (outbound and inbound)
- the District's Youth Protection Officer(s) - should have professional experience in counselling, social work, law, law enforcement, or child development, and may or may not be a Rotary member.
- Provided a process to maintain records of participation to ensure compliance

8. Allegation Handling and Follow-Through

Zone 8 - Oceania - NZ territories takes all allegations of abuse or harassment seriously and will handle them in accordance with the Abuse and Harassment Allegation Reporting Guidelines.

The District will cooperate with all law enforcement agencies, child protective services, and legal investigations and will not interfere with official investigations when conducting its own independent review.

Zone 8 - Oceania - NZ territories has a youth protection officer that is mandated to deal with any specific issues.

The District Programmes Committee Chair, the Youth Protection Officers and the District Governor evaluate and review files, policies, and allegations on an annual basis.

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
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9. Travel by Youth

Youth travel outside of the local community must comply with the District youth protection policies.

For all youth travel sponsored by Zone 8 - Oceania - NZ territories or its clubs, the following will be done before departure:

- Obtain written permission from the parents or legal guardians of the program participants
- Give parents and legal guardians details about the travel, including locations, accommodations, itineraries, and the organiser's contact information
- When travelling more than 150 miles, or 240 kilometers, from the residence, verify that program participants have adequate insurance, including benefits for medical services, emergency medical evacuation, repatriation of remains, and legal liability. Travel insurance covers must be placed with insurers through the ROZ Youth Programmes broker of record and otherwise is the form agreed by the District Insurance Officers.

For the travel of Youth Exchange students outside their host communities, either with their host families or to attend Rotary events, Zone 8 - Oceania - NZ territories must be covered by the general written permission from the students' parents or legal guardians.

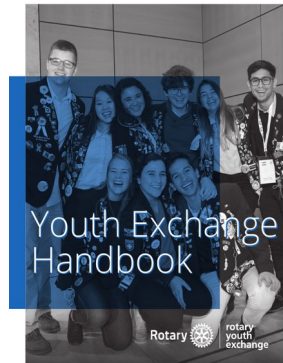
The host district shall receive authorization from the sending district in advance.

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
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10. Zone 8 - Oceania - NZ territories Youth Exchange Administration

Zone 8 - Oceania - NZ territories Youth Exchange Administration is provided through:

- (a) the provisions of the ***“RI Youth Exchange Handbook”***⁷
- (b) the delegations of the Board to the Zone 8 - Oceania - NZ territories Youth Exchange Committee;
- (c) any directions of the District Governor⁸ under the Code or Handbook; and
- (d) as formally agreed with any participating clubs



- (e) as formally agreed under New Zealand law under the Education Act ***“The Education (Pastoral Care of International Students) Code of Practice 2016 (including Amendments 2019) » NZQA”***⁹

- (f) additional guardianship as may be required by the District or RI RYE team to ensure that the child’s behaviours may be directed in relation to health and other matters that may require proof of guardianship.¹⁰

Specific requirements may be supplemented by further operational documents issued by Rotary Zone 8 - Oceania - NZ territories as approved by the Board of ROZ Youth Programmes Limited.

Examples are the annual requirements for host-home inspections and the need for specific agreements with the school and temporary guardianship.

In the event any specific requirements, in the view of the District Governors, if there a conflict with the following general requirements, the general requirements must be also incorporated.

The Roles and Responsibilities section of the ***RI Youth Exchange Handbook*** is adopted by each District Governor during the annual certification process.

7 746_youth_exchange_handbook_en.pdf - note in Section 3 the Roles and Responsibilities for the District Governor, YPO’s and RYE Chairs and Committee members are set out in detail.

8 41.070.1. District Governor Authority Each governor is responsible for the supervision and control of the Youth Exchange program within the district. The district Youth Exchange officers, or committees, are under the supervision of their respective governors and should report to them.

9 The Education (Pastoral Care of International Students) Code of Practice 2016 (including Amendments 2019) » NZQA.pdf – attached as an appendix

10 Care of Children (Appointment of Additional Guardian by Parents) (Forms) Rules 2005

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
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The duties and responsibilities reserved to the District Governor are not delegable and must be observed in practice. In particular the District Governor must be notified of any early return of a student before the return is finalised to ensure all of the 10 matters required of the District as listed are completed.¹¹ Under no circumstances are students to be returned without agreement of:

1. the student's family; and
2. the sending District; and
3. the Governor having the opportunity to check the 10 steps before return have been completed; and
4. in the case of a dispute with the student, student's family and/or sending District the District Governor having the opportunity to carry out the Governor's duty to mediate directly with the sending District Governor.

The general requirements of Rotary International Zone 8 - Oceania - NZ territories for home-hosted youth programmes are:

- that all inbound students have insurance that meets or exceeds what is prescribed in the Rotary Code of Policies.
- that:
 - the inbound youth be covered under the statutory regime in the Accident Compensation Act 2001 and its ancillary Acts and Regulations
 - That either the District, Club or the student have insurance cover that includes cover for:
 - (a) any gap that might arise due to any requirement to contribute to treatment due to being a non-New Zealand resident or otherwise to contribute as exemplified by the *Accident Compensation (Liability to Pay or Contribute to Cost of Treatment) Regulations 2003* or any inter-country reciprocal health care agreement including any surcharge that applies¹²
 - (b) sickness including repatriation costs to the students home country
 - (c) other usual covers for loss of personal belongings and cash.
- That Zone 8 - Oceania - NZ territories store participant and volunteer records online for 50 years after participation, in accordance with all applicable privacy laws.
- That Zone 8 - Oceania - NZ territories provides each student a list of local services (rape and suicide crisis hot-lines, alcohol and drug awareness programs, relevant law enforcement agencies, community services, private services and Lesbian, Gay, Bisexual, Transgender, Queer services, etc.). This list must include the following district and club contacts:

¹¹ RI Youth Exchange Handbook – page 35

¹² See <https://www.health.govt.nz/new-zealand-health-system/eligibility-publicly-funded-health-services/reciprocal-health-agreements> Note that as the operative date there are only 2 such agreements – with Australia and UK

**DISTRICT YOUTH ACTIVITIES
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- For inbound students:
 - (a) Rotarian counsellor
 - (b) host Club President
 - (c) host District Youth Exchange chair
 - (d) host District Governor
 - (e) at least two non-member resource people (one male and one female) who are not related to each other and do not have close ties to the host families or the Rotary counsellor and who can help the students with any problems.
- For outbound students:
 - (a) sending Rotarian counsellor
 - (b) sending Club President
 - (c) sending district Youth Exchange chair
 - (d) sending District Governor
- That Zone 8 - Oceania - NZ territories Complete an annual survey reporting on program activity for RI
- That Zone 8 - Oceania - NZ territories provide a 24-hour emergency contact phone number to students.
- That Zone 8 - Oceania - NZ territories report all serious incidents (abuse or harassment allegations, accidents, crimes, early returns, death) involving Youth Exchange students to Rotary International Youth Exchange staff at youthprotection@rotary.org within 72 hours of learning of the incident or through RI's Youth Protection Report portal at <https://ri.i-sight.com/portal>.
- That Zone 8 - Oceania - NZ territories prohibit any unauthorized exchange activity, such as sending a student on exchange outside of the Rotary Youth Exchange program or outside of the district certification structure
- That Zone 8 - Oceania - NZ territories establish criteria and procedures for a student's removal from the host family and arrange for contingent, temporary housing in advance.
- That Zone 8 - Oceania - NZ territories develop contingency hosting plans that include pre-screened families.
- That Zone 8 - Oceania - NZ territories ensure that all hosting is voluntary. Parents of outbound students and club members must not be required to host inbound students.
- That Zone 8 - Oceania - NZ territories ensure that long-term program participants have multiple host families. It is recommended that long-term program participants be placed with three host families during their exchange.
- That Zone 8 - Oceania - NZ territories conduct follow-up evaluations of both students and host families.

**DISTRICT YOUTH ACTIVITIES
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- That Zone 8 - Oceania - NZ territories the District Youth Exchange Committee Chair request a report from:
 - each outbound program participant that includes information on current hosts, feelings, concerns, ideas, and suggestions. The frequency shall be established in the out bound participant's agreement with the District.
 - Each inbound program participant as agreed with the participant's home District.
- The District Youth Exchange Committee Chair can then review the reports and assist program participants as needed and report to the District Governor as required by at least every quarter.

11. Zone 8 - Oceania - NZ territories Youth Programme Administration

(Special section for New Zealand law)

All programmes that involve children arriving in New Zealand from any overseas country (including countries within Zone 8 - Oceania - NZ territories) must qualify the programme under this policy.

This requires a Youth Programme Risk Management within the the Rotary International Crisis Management Plan for as published for Zone 8 - Rotary Oceania.

DISTRICT YOUTH ACTIVITIES
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APPENDIX 1 - RI STATEMENT OF CONDUCT

**ROTARY INTERNATIONAL'S
STATEMENT OF CONDUCT
FOR WORKING WITH YOUTH**

Rotary International strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotarians, Rotarians' partners, and other volunteers must safeguard the children and young people with whom they come in contact and protect them from physical, sexual, and psychological abuse.

Adopted by the RI Board of Directors, December 2019

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
FOR TERRITORIES
WHERE NEW ZEALAND LAW APPLIES**

APPENDIX 2 - Further resources

Issued by	Document	Location
Rotary International with NZ law changes by Zone 8 - Oceania - NZ territories	775_abuse_harassment_allegation_reporting_guidelines_en_Zone 8 - Oceania - 2023.pdf	rotaryoceania.zone and youthexchange.org.nz
	775_youth_program_volunteer_application_en_Zone 8 - Oceania - 2023.pdf	
	THIS DOCUMENT Rotary International District Youth Protection Policy_en_Zone 8 - Oceania - NZ version March 2023.pdf	
	RI Youth Protection Incident Form.pdf	
Rotary International	746_youth_exchange_handbook_en.pdf	www.rotary.org
	749en - A Guide for Host Families.pdf	
	775_rotary_youth_protection_guide_en.pdf	
	RYE Application.xsd (xml data requirements)	
	Personal Data Use Policy _ My Rotary.pdf	
	Privacy Policy _ My Rotary.pdf	
Rotary International Zone 8 - Oceania - NZ territories - District or NZ specific	Rotary-youth-programmes-for-schools-in-Zone 8 - Oceania.pdf	rotaryoceania.zone
	Metro-Promo-Leaflet-RIYE.pdf	rotaryoceania.zone
	Rotary International Zone 8 - Oceania - RYE 2023 Plan - RI Policies Insurance Risk and Crisis Management	rotaryoceania.zone
	ROZ Youth Programmes Management Agreement MOU for Clubs and Districts - v2 - March 2023	youthexchange.org.nz
	RYE full_application MASTER DRAFT v 5 as at 2023	youthexchange.org.nz
	Rotary_Crisis_management_plan_en_Z8_Oceania	youthexchange.org.nz
	ROZ Youth Programmes Limited - Offer of Place at School MOU	youthexchange.org.nz
	ROZ Youth Programmes Agreement	youthexchange.org.nz

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
FOR TERRITORIES
WHERE NEW ZEALAND LAW APPLIES**

Issued by	Document	Location
	with RYE Students - Acceptance by Inbound Student FINAL - July 2023	
	ROZ Youth Programmes Agreement with RYE Students - Inbound Host Residential Caregiver Agreement FINAL - July 2023	youthexchange.org.nz
NZ Government	The Childrens Act 2014.pdf	http://legislation.govt.nz/
	Childrens Requirements for Safety Checks of Childrens Workers Regulations 2015.pdf	rotaryoceania.zone
	The Care of Children Act 2004 (replaces old Guardianship Act)	https://www.legislation.govt.nz/regulation/public/2005/0097/22.0/DLM326029.html
	secure-vetting-website-user-guide.pdf	https://www.police.govt.nz/about-us/publication/vetting-website-user-guide
	The Education Act The Education (Pastoral Care of International Students) Code of Practice 2021	https://www.education.govt.nz/school/student-support/secondary-school-exchanges/exchange-programme-organisations-epos/
	The Privacy Act 2020 and in particular the HIPC (Health Information Privacy Code)	https://privacy.org.nz/privacy-act-2020/codes-of-practice/hipc2020/

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
FOR TERRITORIES
WHERE NEW ZEALAND LAW APPLIES**

APPENDIX 3 - The Current Certification Conditions for RYE
Document can be downloaded from youthexchange.org.nz



This document outlines the Certification Requirements to participate in Rotary Youth Exchange. If you have any questions or concerns related to Rotary Youth Exchange, please reach out to youthexchange@rotary.org

*Pages 1-9 apply to **traditionally certified** (sending and hosting students) districts.
Pages 10-16 apply to **outbound-only certified** (sending, not hosting students) districts.*

2023-24 TRADITIONAL CERTIFICATION REQUIREMENTS

District Governor Authority

- ☐ The district governor is responsible for the supervision and control of the Youth Exchange program within the district. The district Youth Exchange officers, or committees, are under the supervision of their respective governors and report to them.
- ☐ Governors are required to complete youth protection training as determined by the general secretary before the start of their term.
- ☐ The district complies with the Youth Protection and Rotary Youth Exchange sections of the Rotary Code of Policies ([RCOP](#)).
- ☐ Exchanges are arranged within the structure of the district Youth Exchange program.
- ☐ The district has a system to ensure club compliance with district Youth Exchange policies.

Youth Protection

- ☐ The district has adopted the Statement of Conduct for Working with Youth.
- ☐ The district has adopted RI's zero-tolerance policy against abuse and harassment.
- ☐ The district has developed a procedure for contacting the student's parents or legal guardians as well as the sending district and club once an allegation is brought forth.
- ☐ The district has established reporting procedures, ensuring all volunteers understand their responsibility to report incidents to RI, and to ensure that only those who need to know are informed of an allegation in order to protect the privacy

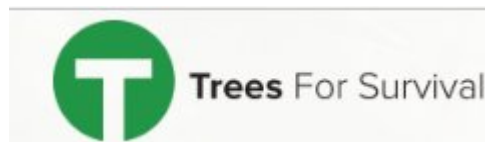
1

**DISTRICT YOUTH ACTIVITIES
WELL BEING POLICY (YAWP)
FOR TERRITORIES
WHERE NEW ZEALAND LAW APPLIES**

**APPENDIX 4 - SOME LOGOS OF THE YOUTH PROGRAMMES OF Zone 8 - Oceania - NZ
territories**



The Rotary National Science & Technology Forum



Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 3 – 775 RI Volunteer Form

The Volunteer Application form

**ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION
FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES**

**SECTION 1A- APPLICATION & ASSURANCES
REQUIRED FOR ALL VOLUNTEERS**

Zone 8 - Oceania - NZ territories strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotarians, Rotaractors and partners, and other volunteers must safeguard the children and young people they come into contact with and protect them from physical, sexual, or emotional abuse.

This information may be provided to an outside agency that this Rotary district has retained to conduct background checks. In some cases, applicants may be asked to obtain their own background checks for review by district officials.

APPLICANT PERSONAL INFORMATION

Full Name _____

Address _____

City _____ State/Province _____ Postal code _____

Mobile _____ Position _____ Email _____

How long have you lived at this address? _____
(If fewer than five years, list previous residences in an attachment.)

2 FORMS OF NZ Police Vetting photo identification _____
(e.g., Passport, Driver licence)

Date of birth (dd/mm/yyyy) _____

CONSENT

I certify that all of the statements in this application and any attachments are true and correct to the best of my knowledge and that I have not withheld any information that would affect this application unfavourably. I understand that Zone 8 - Oceania - NZ territories will deny a volunteer position to anyone convicted of a crime of violence, sexual abuse or harassment, or any other crime of a sexual nature and may deny a volunteer position to anyone who has been charged with these crimes.

I give Zone 8 - Oceania - NZ territories permission to verify the information on this application, including by reviewing the public records that I have provided, which are duly certified, or by searching law enforcement and other published records (including driving records and criminal background checks) in addition to contacting my former employers and the references I provided. I understand that this information will be used in part to determine my eligibility for a volunteer position. I also understand that as long as I remain a volunteer, this information may be checked again at any time. I understand that I will have an opportunity to review my criminal history.

WAIVER

In consideration of my acceptance and participation in the Rotary youth program, I, to the full extent permitted by law, hereby release, defend, hold harmless, and indemnify participating Rotary and Rotaract clubs, Rotary districts, multi-district organizations, and their members, officers, directors, committee members, agents, and employees, and Rotary International, its directors, officers,

1 of 10

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

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APPLICANT PERSONAL INFORMATION

Full Name _____

Address _____

City _____ State/Province _____ Postal code _____

Mobile _____ Position _____ Email _____

How long have you lived at this address? _____

(If fewer than five years, list previous residences in an attachment.)

2 FORMS OF NZ Police Vetting photo identification _____

(e.g., Passport, Driver licence)

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ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

committee members, employees, agents, and representatives ("Indemnitees") from any or all liability for any claim, loss, damages, liabilities, expenses, bodily injury, or death, including any such liability that may arise out of the negligence of any of the Indemnitees or may be suffered or claimed by me as a result of an investigation of, action concerning, or communication of my background in connection with this application.

FURTHER ASSURANCES AND REPRESENTATIONS

I further agree to conform to the rules, regulations, and policies of Rotary International, the Zone 8 - Oceania - NZ territories youth programmes, and its affiliates.

I confirm that I have a copy of and have read the Rotary Abuse Harassment Allegation Reporting Guidelines.

I hereby confirm, represent, and warrant that I have never been convicted of or charged with a violent crime, child abuse or neglect, child pornography, child abduction, kidnapping, rape, or other sexual offence, nor have I ever been ordered by a court to receive psychiatric or psychological treatment in connection therewith.

If any provision of this agreement is determined to be illegal or unenforceable, the remaining provisions shall remain in full force and effect. By signing this Application, I acknowledge that I have read this Application and fully understand its contents.

Signature of applicant _____

Printed name _____ Date _____

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 1B - PRIVACY CONTROLLED INFORMATION* REQUIRED FOR ALL VOLUNTEERS

**This PAGE MUST BE COMPLETED AS
A SEPARATE DOCUMENT TO ENABLE
ACCESS CONTROLLED STORAGE**

ADDITIONAL INFORMATION (

Position applied for _____

Are you a member of a Rotary or Rotaract club? ☐ Yes ☐ No

If yes, indicate club name and year joined _____

My Linked in profile is here: _____

My Facebook page is here: _____

My CV is attached.

CRIMINAL HISTORY

1. Have you ever been charged with, been convicted of, or pleaded guilty to any crimes? ☐ Yes ☐ No
2. Have you ever been subject to any court order (including an order from a civil, family, or criminal court) that involved sexual, physical, or verbal abuse, including but not limited to domestic violence or civil harassment injunctions or protective orders? ☐ Yes ☐ No

If you answered yes to either question, please explain. Also indicate the dates of the incidents and the country and province or state in which each occurred (attach a separate sheet if needed).

[Note: access to this information will be controlled under the Privacy Act 2020](#)

**END OF SECTION 1A &1B
REQUIRED FOR ALL VOLUNTEERS**

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 1C - ROTARIAN/ROTARACTOR SPONSOR* REQUIRED FOR ALL VOLUNTEERS

ROTARIAN OR ROTARACTOR SPONSOR

I confirm I have known the above Applicant for at least 3 years and that:

1. I believe that the applicant is a suitable volunteer and have no knowledge that might be a reason to challenge that belief.
2. I have served as an officer of Rotary International in the role(s) indicated below and are fully aware of the current Rotary International policy for Youth Protection: (Please tick the appropriate boxes) - **ONLY 1 REQUIRED**

Rotary Club President _____ ☐

Rotaract Club President _____ ☐

Rotary District Governor Elect _____ ☐

Rotary District Governor _____ ☐

Signature of applicant _____

PRINTED NAME _____ **DATE** _____

**END OF SECTION 1C
REQUIRED FOR ALL VOLUNTEERS**

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 2B - ONLY REQUIRED FOR VOLUNTEERS INVOLVED IN HOME STAY PROGRAMMES

EMPLOYMENT HISTORY

(FOR THE PAST FIVE YEARS; ATTACH ADDITIONAL SHEETS IF NECESSARY)

CURRENT EMPLOYER

Current employer _____

Address _____

City _____ State/Province _____

Postal code _____ Country: _____

Phone _____ Position _____

Dates of employment _____

Supervisor's name _____

Supervisor's - years known _____

supervisors Email Address _____

PREVIOUS EMPLOYER

Previous employer _____

Current employer _____

Address _____

City _____ State/Province _____

Postal code _____ Country: _____

Phone _____ Position _____

Dates of employment _____

Supervisor's name _____

Supervisor's - years known _____

supervisors Email Address _____

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

ROTARY HISTORY WITH YOUTH

(ATTACH ADDITIONAL SHEETS IF NECESSARY)

Have you held a Rotary youth program position in the past? ☐ Yes ☐ No

If yes, indicate below:

District _____

Role _____ Years _____

Club _____

Role _____ Years _____

Other _____

Role _____ Dates _____

**END OF SECTION 2B -
ONLY REQUIRED FOR VOLUNTEERS
INVOLVED IN HOME STAY PROGRAMMES**

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 2C VOLUNTEER HISTORY ONLY REQUIRED FOR VOLUNTEERS INVOLVED IN HOME STAY PROGRAMMES

VOLUNTEER HISTORY WITH YOUTH
(FOR THE PAST FIVE YEARS; ATTACH ADDITIONAL SHEETS IF NECESSARY)

Organization _____

Address _____

City _____ State/Province _____ Postal code _____

Phone _____ Role _____

Dates _____ Supervisor's name _____

Organization _____

Address _____

City _____ State/Province _____ Postal
code _____

Phone _____ Role _____

Dates _____ Supervisor's name _____

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 2D PERSONAL REFERENCES ONLY REQUIRED FOR VOLUNTEERS INVOLVED IN HOME STAY PROGRAMMES

PERSONAL REFERENCES

(MAY NOT BE RELATIVES; NO MORE THAN ONE MAY BE A FORMER OR CURRENT ROTARIAN)

1. Name _____
Address _____
City _____ State/Province Postal
code _____
Phone _____ Relationship _____

2. Name _____
Address _____
City _____ State/Province Postal
code _____
Phone _____ Relationship _____

3. Name _____
Address _____
City _____ State/Province Postal
code _____
Phone _____ Relationship _____

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 2D QUALIFICATIONS AND TRAINING ONLY REQUIRED FOR VOLUNTEERS INVOLVED IN HOME STAY PROGRAMMES

QUALIFICATIONS

What qualifications do you have for this role?

PREPARATION AND TRAINING

What preparation and training have you completed for this position?

FURTHER CONFIRMATION

We/I, as the home hosting volunteers confirm that we/I are:

- (a) prohibited from contact with program participants until a written application, interview, reference check, and criminal background check have been conducted; and
- (b) clearance for unsupervised contact with program participants has been issued.
- (c) Aware that all Rotary member and non-member volunteers who know about an allegation must make sure that RI is informed of it within 72 hours.

Signature of applicant _____

Printed name _____ Date _____

ROTARY ZONE 8 - OCEANIA YOUTH PROGRAM VOLUNTEER APPLICATION FOR TERRITORIES WHERE NEW ZEALAND LAW APPLIES

SECTION 2E SIGN-OFFS

ONLY REQUIRED FOR VOLUNTEERS INVOLVED IN HOME STAY PROGRAMMES

For district use only:

REFERENCE CHECKS

DATE

References checked by _____
INITIALS

DATE

References checked by _____
INITIALS

DATE

References checked by _____
INITIALS

HOME VISIT CHECKS

DATE

Home checked by _____
INITIALS

DATE

Home checked by _____
INITIALS

POLICE CHECK

DATE

Police check completed by _____

Role: _____

e.g Youth Protection Officer

DATE

INITIALS

QUALIFICATION CHECKS

DATE

Qualifications received and uploaded by _____
INITIALS

—

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	100
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 4 – 775 RI Harassment Policy

The Abuse and Harassment Policy

ROTARY ZONE 8 - OCEANIA ABUSE AND HARASSMENT ALLEGATION REPORTING GUIDELINES FOR TERRITORIES UNDER NEW ZEALAND LAW

ZONE 8 – OCEANIA and its constituent Districts¹ is committed to protecting the safety and well-being of all youth program participants and will not tolerate abuse or harassment. All allegations will be taken seriously and must be handled within the following guidelines.

The safety and well-being of program participants must always be top priority.

DEFINITIONS

Consent – is as defined in law but otherwise for the purposes of Rotary International policies means an informed, knowing, and voluntary decision to engage in an activity or behaviour.

Emotional, psychological or verbal abuse – The use of fear, humiliation, or verbal assault to control the behaviour of another. Examples include rejecting the person, preventing them from developing normal social relationships, and making derogatory statements based on characteristics that include age, ethnicity, race, colour, abilities, religion, socio-economic status, culture, sex, sexual orientation, and gender identity.

Grooming: Establishing an emotional connection with someone to lower their inhibitions and gain their trust with the intent to be sexually abusive

Physical abuse – Physical contact intended to cause pain, injury, or other physical suffering or harm.

Neglect – Failure to provide the food, shelter, or emotional or medical care that is necessary to well-being.

Sexual abuse – Engaging in or arranging implicit or explicit sexual acts, whether they are performed alone or with another person of any age or gender, through force or coercion or with anyone who is unable to give consent. Any sexual activity between a legal adult and a minor is considered sexual abuse. Sexual abuse can also include non-touching offences, such as voyeuristic behaviour, indecent exposure, or showing a young person sexual or pornographic material.

Sexual harassment – Sexual advances, requests for sexual acts, or verbal or physical conduct of a sexual nature that is unwanted or directed at someone unwilling or unable to provide consent. It can be physical or verbal, and even occur in the form of electronic communication, such as text messages or on social media. In some cases, sexual harassment precedes sexual abuse and is used by sexual predators to desensitize or groom their victims. Examples of sexual harassment include:

- Sexual epithets or jokes, written or spoken references to sexual conduct, gossip about one's sex life, and comments about a person's sexual activity, deficiencies, or prowess
- Verbal abuse of a sexual nature
- Display of sexually suggestive objects or images
- Sexual leering or whistling
- Inappropriate physical contact, such as brushing against a person
- Obscene language or gestures, and suggestive or insulting comments
- Giving private or secret gifts, including those of a sexual nature
- Sexual violation being a 'sexual connection' under the New Zealand Crimes Act 1961

¹ As at March 2023 being Rotary International Districts 9910, 9920, 9930, 9940 and 9999.

ROTARY ZONE 8 - OCEANIA ABUSE AND HARASSMENT ALLEGATION REPORTING GUIDELINES FOR TERRITORIES UNDER NEW ZEALAND LAW

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- Inappropriate physical contact, such as brushing against a person
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ROTARY ZONE 8 - OCEANIA ABUSE AND HARASSMENT ALLEGATION REPORTING GUIDELINES FOR TERRITORIES UNDER NEW ZEALAND LAW

RECEIVING AN ALLEGATION REPORT

Any adult to whom a program participant reports abuse or harassment must:

Listen attentively and stay calm. Acknowledge that it takes courage to report abuse or harassment. Be encouraging, but remain neutral; do not express shock, horror, or disbelief.

Assure privacy but not confidentiality. Explain that you will have to tell someone about the abuse or harassment to make it stop and ensure that it doesn't happen to others.

Get the facts, but don't interrogate. Ask questions that establish facts: who, what, when, where, and how. Reassure the young person that he or she did the right thing in telling you. Avoid asking "why" questions, which may be interpreted as questioning the young person's motives. Remember that your responsibility is to report this information to the proper authorities.

Be non-judgmental and reassure. Avoid criticizing anything that has happened or anyone who may be involved. It's especially important not to blame or criticize the young person. Emphasize that it was not his or her fault and that it was brave and mature to come to you.

Document the allegation. Record the conversation, including the date and time, as soon after the report as you can. Try to record the young person's exact words.

ALLEGATION RESPONSE

The following steps must be taken immediately after alleged abuse or harassment is reported. Some of them may be performed by any program volunteer, while others should be performed by a district officer, as specified.

1. Protect the young person.

Ensure the safety and well-being of the young person by removing him or her from the situation immediately and preventing all contact with the alleged abuser or harasser. Reassure the young person that this is for his or her safety and is not a punishment.

Take immediate action to ensure the young person's health and well-being, and get him or her medical or psychological care, if necessary.

2. Report the allegations to appropriate authorities.

Immediately report all cases of abuse or harassment — first to the New Zealand Police for investigation and then to club and district leaders for follow-through. Interrogations related to allegations of abuse or harassment must be left entirely to law enforcement agencies.

In most situations, the first Rotary contact is one of the ZONE 8 - OCEANIA Youth Protection Officers (YPOs), who is responsible for seeking advice from and interacting with appropriate agencies. If the allegation involves the conduct of any YPO, the district governor should be the first Rotary contact.

ZONE 8 - OCEANIA will cooperate with police or legal investigations.

ZONE 8 - OCEANIA has researched local, state, and national laws related to youth protection, including reporting allegations, and notes the following legal requirements of which all volunteers must be aware:

- *under S59 of the Crimes Act it is unlawful for anyone (including a parent or guardian) to use force against a child. The only justifiable circumstances are the use of force to restrain a child from demonstrable harm. Adults caring for children can still use 'force' (by*

ROTARY ZONE 8 - OCEANIA ABUSE AND HARASSMENT ALLEGATION REPORTING GUIDELINES FOR TERRITORIES UNDER NEW ZEALAND LAW

methods of holding or restraining) to keep children safe. For example adults can stop a child from running out onto the street, touching a hot stove, hurting themselves or other children and they can carry a protesting child out of a supermarket.

- Volunteers must not, other than while waiting for assistance from authorities, restrain a young person. For example, if a child is in your care and wants to leave your care and that is not permitted you must immediately seek help from the authorities and inform your YPO and, if an Exchange Student, the child's counsellor, in that order

- (a) watching, loitering near, or preventing or hindering access to or from, that person's place of residence, business, employment, or any other place that the person frequents for any purpose:
- (b) following, stopping, or accosting that person:
- (c) entering, or interfering with, property in that person's possession:
- (d) making contact with that person (whether by telephone, correspondence, electronic communication, or in any other way):
- (e) giving offensive material to that person or leaving it where it will be found by, given to, or brought to the attention of that person:
- (ea) giving offensive material to a person by placing the material in any electronic media where it is likely that it will be seen by, or brought to the attention of, that person:
- (f) acting in any other way—
 - (i) that causes that person (person A) to fear for his or her safety; and
 - (ii) that would cause a reasonable person in person A's particular circumstances to fear for his or her safety.

Source: [NZ Government Legislation - Harrassment Act](#)

- Volunteers must not harass or fail to act when aware of any harassment, especially any young person. While harassment under Section 4 the Harassment Act 1997 requires a repeated conduct, Rotarians and Volunteers for Rotary programmes are expected to adopt higher standards. As the provisions of the Harassment Act are not widely known an abridged version is set out below. Note the key to whether harassment has occurred is whether the person complaining, as a result of the conduct, causes or would be reasonable to cause fear for safety:
- All volunteers must be alert to any circumstance that might constitute a sexual assault.

What is sexual assault?

Sexual assault is a term used to describe a range of sex crimes committed against a person. It is any unwanted or forced sex act or behaviour that has happened without a person's consent.

Sexual assault may include:

- Rape (sexual intercourse without consent)
- Indecent assault (unwanted sexual touching)
- Acts of indecency (exposure)

Sexual assault is a violent crime and it is not always committed by strangers. Often the offender is known to the victim, and it can occur within relationships or marriage. It can be a terrifying experience that may have long term effects on the victim regardless of their age, gender, status, culture, ability or sexuality.

What is consent?

A person consents to sexual activity if they do it actively, freely, voluntarily and consciously without being pressured into it.

Source: [NZ Police Guides - Sexual Assault](#)

ROTARY ZONE 8 - OCEANIA ABUSE AND HARASSMENT ALLEGATION REPORTING GUIDELINES FOR TERRITORIES UNDER NEW ZEALAND LAW

- *Sex or an sexual act with young persons that are below the age of consent is a crime under Section 134 of the Crimes Act 1961. The age of consent is, generally 16. However if the young person is **below 18** and an adult is in guardianship role (parent, stepparent, foster parent, guardian, uncle, aunt or other members of extended family, whanau or other power or authority or responsibility for care or upbringing) the age of consent is, under Section 131 of the Crimes Act 1961, raised to **18**.*
- *there are further legal constraints if the volunteer's activities are also regulated under the laws relating to protection and care of children and young persons*
- *Volunteers should also note the right to report (a whistleblower right) under section 18 of the Children, Young Persons, and Their Families (Oranga Tamariki) Legislation Act 2017 as set-out below:*

Any person who believes that a child or young person has been, or is likely to be, harmed, ill-treated, abused, (whether physically, emotionally, or sexually), neglected, or deprived, or who has concerns about the well-being of a child or young person, may report the matter to the chief executive or a constable.

Source: [Childrens and Young Persons Act, 2017 \(abbreviated title\)](#)

3. Remove the accused person from contact with youth.

ZONE 8 - OCEANIA will remove the alleged offender from all contact with Rotary youth program participants until the matter is resolved.

Follow established criteria and procedures for removing a Rotary Youth Exchange student from a host family if they report a problem with, or make an allegation against, a host family member. If appropriate, move the student to the temporary housing that was screened in advance.

4. Avoid gossip and blame.

Don't tell anyone about the allegation other than those who need to know. Be careful to protect the rights of both the victim and the accused during the investigation.

ZONE 8 - OCEANIA maintains the privacy (as distinct from confidentiality) of any accused person by enforcing the following procedures:

- (a) ensuring that the process is managed by a District Officer that has legal training*
- (b) taking such steps that are possible to ensure that any investigation is carried out in confidence*
- (c) on closing any investigation that does not result in an action that is public ensuring that all records remain protected by data security that restricts access on a need to know basis.*

5. Follow through.

A district officer must inform RI of the allegation within 72 hours and provide ongoing status reports.

ZONE 8 - OCEANIA will ensure that the program participant's parents or legal guardians have been notified and offer the young person an independent, non-Rotarian counselor to represent his or her interests.

If law enforcement agencies will not investigate, or if the investigation is inconclusive, the district governor will appoint a district review committee to coordinate an independent review to ensure that district youth protection policies were followed, confirm that youth safety was the highest

ROTARY ZONE 8 - OCEANIA ABUSE AND HARASSMENT ALLEGATION REPORTING GUIDELINES FOR TERRITORIES UNDER NEW ZEALAND LAW

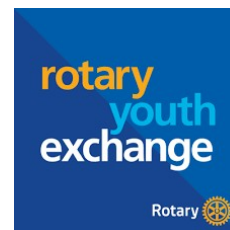
priority, and determine any necessary modifications to district procedures. This review is not responsible for determining the validity of any allegations; that can only be done by youth protection agency personnel or trained law enforcement professionals.

If law enforcement has found the allegations to be non-criminal, the district governor is responsible for contacting the alleged offender. The district governor may delegate this task to a district youth protection officer or district review committee.

ZONE 8 - OCEANIA will document all accusations of inappropriate behaviour and the actions taken to resolve the situation, so that patterns of inappropriate behaviour are identified and addressed.


END OF DOCUMENT

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 5 – Storing Health Info in NZ

The NZ Privacy Act 2020 - HIPC Summary Fact Sheet


 Privacy Commissioner
 Te Mana Matāpono Matatapu

HEALTH INFORMATION PRIVACY CODE FACT SHEET 1

Overview

Health Information Privacy Code 2020

The Code regulates how health agencies (such as doctors, nurses, pharmacists, health insurers, hospitals, Primary Health Organisations, ACC and the Ministry of Health) collect, hold, use and disclose health information about identifiable individuals.

Key concepts in the Code

The two key concepts are:

- **Purpose:** Agencies must know *why* they are collecting health information and collect only the information they need. Once health information has been collected from a patient for a particular purpose, it can be used or disclosed for that purpose without additional consent.
- **Openness:** Agencies need to let patients know how their information is going to be used and disclosed so the patients can make decisions about whether to provide it.

"Ownership" of health information is a red herring

It's common for people to wonder who owns their health information. However, ownership isn't necessarily the best way to think about health information.

It is more accurate to say that:

- People have **rights** over health information about themselves. Rule 6 gives individuals the right to access information about themselves and rule 7

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gives them the right to seek correction of that information if they think it is inaccurate or misleading.

- Health agencies have **obligations** over the health information they hold. These obligations are set out in the 13 rules of the Code and are briefly summarised below and in the other fact sheets in this series.

Patient expectations about health information

The Code recognises that people expect their health information:

- to be kept **confidential**, because it was probably collected in a situation of confidence and trust
- to be treated as **sensitive**, because it may include details about body, lifestyle, emotions and behaviour
- may have **ongoing use** if a piece of medical information becomes clinically relevant even a long time after it was initially collected
- will be **used for the purposes** for which it was originally collected, and they will be **told about** those purposes.

The Code's 13 health information privacy rules

The Code applies rules to agencies in the health sector. When it comes to health information, the 13 *rules* of the code substitute for the 13 *principles* of the Privacy Act.

From the point of view of a health agency, the rules in the Code can be summarised:

1. Only collect health information if you really need it.
2. Get it straight from the people concerned where possible.
3. Tell them what you're going to do with it.
4. Be considerate when you're getting it.
5. Take care of it once you've got it.
6. People can see their health information if they want to.
7. They can correct it if it's wrong.
8. Make sure health information is correct before you use it.
9. Get rid of it when you're done with it.
10. Use it for the purpose you got it.
11. Only disclose it if you have a good reason.

12. Make sure that health information sent overseas is adequately protected.
13. Only assign unique identifiers where permitted.

The first 12 rules form a kind of 'life-cycle' for health information.

Agencies must first **decide what information they need**, and where and how they are going to get it. They then need to ensure they hold the information with **appropriate protections** and that they comply with any **access or correction requests** they receive. Finally, **use and disclosure** need to be done with care and kept in line with the purposes for which the information was collected.

There are also a number of exceptions to the general rules listed above. For instance:

- Doctors can collect information about a patient's family member's health when **preparing a family or genetic history** (which could otherwise breach rule 2 since it's not being collected from the family member directly).
- Hospitals can disclose basic information to enquirers about **a hospital patient's presence, condition and progress** (as long as the patient or their representative hasn't directly vetoed that disclosure).
- Doctors can disclose information about a patient to **caregivers or close relatives** in line with recognised professional practice (again, as long as the patient hasn't vetoed that disclosure).
- Health agencies can disclose information where necessary to deal with a serious **threat to anyone's health or safety**.

The other fact sheets in this series have more detailed information on the rules.

How the rules are enforced

The first stop for a complaint will always be the agency itself. Under the Code, agencies have to have privacy officers and complaint handling procedures.

These rules are all enforceable by complaining to the Office of the Privacy Commissioner's office, and then, if necessary, to the Human Rights Review Tribunal. **There can be financial consequences for agencies that breach the rules**, so compliance is important.

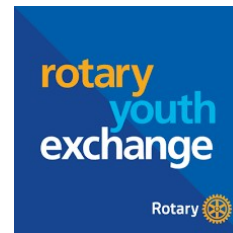
Where to get additional assistance

There are four other Health Information Privacy Code fact sheets that give a broad overview of how the Code works in practice.

For more detailed information, a copy of the Health Information Privacy Code (with explanatory commentary) is available from the Office of the Privacy Commissioner's website at www.privacy.org.nz

For enquiries, the Office of the Privacy Commissioner has an 0800 number, 0800 803 909 and an AskUs knowledge base of frequently asked questions – <https://www.privacy.org.nz/tools/knowledge-base/>.

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
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Project Start Date	13 November 2024
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Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 6 - RYE Long Term Exchange Forms

UPDATED WITH NEW DOCUMENTS PROVIDED AT THE MELBOURNE RYE CONFERENCE AT 2023 RI CONVENTION

Note: the first document is the Offer from ROZ Youth Programmes Ltd to an Inbound Student

RYE Long Term Exchange Forms 2023		

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands)
	17 Countries across 5 Districts
Project Start Date	13 November 2024
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RYE Long Term Exchange Forms 2023



Rotary Youth Exchange – Long-Term Exchange Program

Section Z: Application Checklist

Use this checklist to ensure that you have all of the necessary parts for your application. All copies must meet RYE Sponsor District signature requirements; all photographs must be inserted digitally and be of good quality. Submit the proper number of complete sets, as directed by your sponsor Rotary Club or District.

Sec.	Application Component
A	<i>Personal Information</i> pages completed with photo digitally inserted
B	<i>Letters & Photos</i> completed , with 4 photos digitally inserted
C-1	<i>Medical History & Examination</i> completed and signed by physician <i>Letter(s) of explanation and other additional pages, if any, should be appended following physician signature page.</i>
C-2	<i>Copies of Vaccination Records and Certificates</i> digitally inserted
D	<i>Dental Health and Examination</i> completed and signed by dentist
E	<i>Endorsements-Sponsor Club, Student & Parents</i> completed and signed by all persons
F	<i>Endorsements-Host Club, District & School</i> top of form completed , remainder left blank
G	<i>Rules, Attestations, Permissions, Releases & Consents</i> signed by student and parents/legal guardians
H-1	<i>Secondary School Personal Reference</i> form provided to reference with instructions for separate return by electronic method or pre-addressed envelope (do not submit Section H-1 with your application).
H-2	<i>Copy of school transcript</i> (with translation into English if transcript is in another language)
P	<i>Passport/Birth Certificate:</i> Copy of passport (valid at least 6 months beyond the estimated end of exchange) OR birth certificate (if valid passport is not available)
Additional Forms Required by Sponsor District (if any)	

Final Instructions: When you have completed entry of the required fields in the application form, you are ready to print the document. Remember to print the proper number of copies, as directed by your sponsor Rotary Club/District. Then, you can obtain additional information and signatures where required, and use the checklist above to make sure everything is complete.

Paper copies: Assemble your application Sections A through Z into complete collated sets (excluding Section H-1). Include this checklist. Do not include any pages before Section A. Please do not staple or bind your application or any part of it; use paper clips or clamps instead. Submit the number of paper application originals specified by your local sponsor Rotary Club or District.

Electronic copy: Your RYE Sponsor District may require an electronic copy of this application instead of paper (or possibly both). If so, this may or may not include the use of electronic signatures. You will receive separate instructions from your sponsor district for preparation and electronic submission of this application, if required.

Good luck!

Rotary Youth Exchange
Long-Term Exchange Application Form
Revised - 2023 March

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange – Long Term Exchange Program

Section P: Passport/Birth Certificate

[Click Here to select file](#)
containing scanned copy or good
quality image of Student's Passport
(Photo page with Passport Number)

The copy should include only the passport. Use a
suitable editing tool to remove (crop) any blank or
other image areas which are not part of the
passport before inserting the file here.

If no Passport yet obtained use Birth Certificate.

(Works best Using Adobe Acrobat or Acrobat Reader)









Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange – Long-Term Exchange Program

Section H-1: Secondary School Personal Reference (this page only)

Student: Complete the top section of this form. As your reference, select a teacher or administrator familiar with your abilities and accomplishments at school. Then do **one** of these two options (depending on resources and if an e-mail address is provided at the bottom of this page for submitting the form):

- 1. E-mail this page** to your reference to be completed for submission to Rotary as an e-mail attachment (with e-Signature or scanned with ink signature).
- 2. OR** Print this page and give to your reference with a pre-addressed postage-paid envelope to the mail address shown at the bottom of this page. By so doing, you give permission for that individual to release this information to the Rotary club/district Youth Exchange committee for their review.

Applicant's Full Legal Name (use uppercase for FAMILY name; e.g. John David SMITH)	Date of Birth (YYYY-MM-DD)	Grade	Male Female Non-Binary
--	----------------------------	-------	------------------------------

Evaluator: This student is applying for a one-year educational study abroad program under Rotary club/district sponsorship. Please complete and sign this form within seven days of receipt. The information you submit will not be revealed to the student, unless required by law.

How long have you known this student? In what capacity do you know this student? (Teacher? Counselor? Coach? Other? What years?)

1. Ratings

Area	Excellent	Good	Average	Below Average	No Basis to Rate
Creative, original thought					
Independence, initiative					
Intellectual ability					
Emotional stability					
Academic achievement					
Openness to new ideas					
Flexibility, adaptability					
Ability to communicate					
Potential for growth					
Disciplined habits					
Participation					

- Do you believe the applicant has the ability, work habits, character traits, and flexibility to succeed in an unfamiliar environment that will include learning a foreign language? Yes No
- Do you believe the applicant's parents/legal guardians support the wish to spend time abroad? Yes No Not Sure
- Please use the comments box (below), if necessary, to explain your answers to questions 2 and 3, to provide any other comments on the applicant's suitability as an exchange student and cultural ambassador.

RECOMMENDATION

In reference to this Applicant's candidacy as a future Rotary Youth Exchange student, I (Check one.)

Strongly Recommend Recommend Have No Opinion Do Not Recommend Strongly Do Not Recommend

Explanations or additional comments (optional):

Name		Title		e-Signature (or ink on paper)		Signature Date (YYYY-MM-DD)	
Name of School			Phone		E-mail		

DO NOT RETURN THIS FORM TO THE STUDENT APPLICANT.

END OF SECTION H-1

Form return instructions:



Rotary Youth Exchange – Long-Term Exchange Program

Section G: Rules, Attestations, Permissions, Releases & Consents

As a Youth Exchange student sponsored by a Rotary club or district, you must agree to the following rules and conditions of exchange. Violation of any of these rules may result in dismissal from the program and immediate return home, at student's expense. Please note that districts may edit this document or insert additional rules if needed to account for local conditions.

Rules and Conditions of Exchange

- 1) You must obey the laws of the host country. If found guilty of violating any law, you can expect no assistance from your sponsors or native country. You must return home at your own expense as soon as released by authorities.
- 2) You will be under the host district's authority while you are an exchange student and must abide by the rules and conditions of exchange provided by the host district. Parents or legal guardians must not authorize any extra activities directly to you. Any relatives you may have in the host country will have no authority over you while you are in the program.
- 3) You are not allowed to possess or use illegal drugs. Legal medications that are prescribed to you by a physician are allowed.
- 4) The illegal drinking of alcoholic beverages is expressly forbidden. Students who are of legal age should refrain. If your host family offers you an alcoholic drink, it is permissible to accept it under their supervision in the home. Excessive consumption and drunkenness is forbidden.
- 5) You may not operate a motorized vehicle, including but not limited to cars, trucks, motorcycles, aircraft, all-terrain vehicles, snowmobiles, boats, and other watercraft, or participate in driver education programs.
- 6) Smoking is discouraged. If you state in your application that you do not smoke, you will be held to that position throughout your exchange. Your acceptance and host family placement is based on your signed statement. Under no circumstances are you to smoke in your host family's bedrooms.
- 7) Body piercing or obtaining a tattoo while on your exchange, without the express written permission of your natural parents, host parents, host club, and host district, is prohibited, for health reasons.
- 8) You must make every effort to learn the language of the host country, and may be responsible for any costs for tutoring, language camps, or other instruction.
- 9) Limit your use of the Internet and mobile phones, as directed by your host district, host club, and host family. Excessive or inappropriate use is not acceptable. Accessing or downloading pornographic material is expressly forbidden.
- 10) You must attend school regularly and make an honest attempt to succeed.
- 11) You must have health and accident or travel insurance that provides coverage for accidental injury and illness, death benefits (including repatriation of remains), disability/dismemberment benefits, emergency medical evacuation, emergency visitation expenses, 24-hour emergency assistance services, and legal services, in amounts satisfactory to the host Rotary club or district in consultation with the sponsor Rotary club or district, with coverage from the time of your departure from your home country until your return.
- 12) You must also have liability coverage through a travel insurance or other applicable policy, in amounts satisfactory to the host Rotary club or district in consultation with the sponsor Rotary club or district.
- 13) You must have sufficient financial support to assure your well-being during your exchange. Your host district may require a contingency fund for emergency situations. Unused funds will be returned to you or to your parents or legal guardians at the end of your exchange.
- 14) You must follow the travel rules of your host district. Travel is permitted with host parents or for Rotary club or district functions authorized by the host Rotary club or district with proper adult chaperones. The host district and club, host family, and your parents or legal guardians must approve any other travel in writing, thus exempting Rotary of responsibility and liability.
- 15) You must return home directly by a route mutually agreeable to your host district and your parents or legal guardians.
- 16) Any costs related to an early return home or any other unusual costs (language tutoring, tours, etc.) are the responsibility of you and your parents or legal guardians.
- 17) Visits by your parents or legal guardians, siblings, or friends while you are on exchange may only take place with the host club's and district's consent and within their guidelines. Typically visits may be arranged only in the last quarter of the exchange or during school breaks and are not allowed during major holidays.
- 18) Serious romantic activity is to be avoided. Sexual activity is forbidden.
- 19) Talk with your host club counselor, host parents, or other trusted adult if you encounter any form of abuse or harassment.

Recommendations for a Successful Exchange

- 1) You should communicate with your first host family prior to leaving your home country. The family's information will be provided to you by your host club or district prior to your departure.
- 2) Respect your host's wishes. Become an integral part of the host family, assuming duties and responsibilities normal for a student of your age or for children in the family.
- 3) Learn ahead of time as much of the language of your host country as possible and use the language regularly. Teachers, host parents, Rotary club members, and others you meet in the community will appreciate the effort. It will go a long way in your gaining acceptance in the community and with those who will become lifelong friends.
- 4) Attend Rotary-sponsored events and host family events and show an interest in these activities. Volunteer to be involved; do not wait to be asked. Lack of interest on your part is detrimental to your exchange and can have a negative impact on future exchanges.
- 5) Get involved in your school and community activities. Plan your recreation and spare-time activities around your school and community friends. Don't spend all your time with other exchange students. If there is a local Interact club, you are encouraged to join in.
- 6) Choose friends in the community carefully. Ask for and heed the advice of host families, counselors, and school personnel in choosing friends.
- 7) Do not borrow money. Pay any bills promptly. Ask permission to use the family phone or computer, keep track of all calls and time on the Internet, and reimburse your host family each month for the costs you incur.
- 8) If you are offered an opportunity to go on a trip or attend an event, make sure you understand any costs you must pay and your responsibilities before you go.



Rotary Youth Exchange – Long-Term Exchange Program

Section G: Rules, Attestations, Permissions, Releases & Consents

Statement of Conduct for Working with Youth

Rotary International strives to create and maintain a safe environment for all youth who participate in Rotary activities. To the best of their ability, Rotary members, their partners, and other volunteers must safeguard the children and young people with whom they come into contact and protect them from physical, sexual, and psychological abuse.

Adopted by the Rotary International Board of Directors, October 2019

Instructions:

Regardless of the age of the student, this form should be signed by the exchange student and by both of his or her parents. If a parent does not have custody of the student and a legal guardian does, then the form should be signed by the legal guardian. A step parent needs to sign the form only if the step parent has adopted the student or has been appointed legal guardian. This applies to all signature blocks, not only in this Section, but elsewhere in this Application Form.

ATTESTATIONS AND AGREEMENT TO PROGRAM RULES AND CONDITIONS

As the undersigned applicant and undersigned parents or legal guardians of the applicant, we hereby state that we have read and understood the Program Rules and Conditions of Exchange. Should I, as a student, be selected for an exchange, I agree to abide by these rules and others imposed on me with due notice during my time as an exchange student in the host country.

We attest that we have read and understand the Statement of Conduct for Working with Youth. We understand that all Rotarians and host families are expected to have read and understand this statement as well.

I understand that, if selected for an exchange, I will be provided with training and written material on abuse and harassment and that this information will include the contact information of the person I should contact if I encounter any form of abuse or harassment.

The undersigned applicant attests that I am of good health and character, understand the importance of the role of a youth ambassador as a Rotary Youth Exchange student, and will, to the best of my ability, maintain the high standards required of a Rotary Youth Exchange student should I be chosen to represent my sponsor Rotary club and district, school, community, state/province, and country. I further state that all the material contained in this application and the attached document are true and accurate to the best of my knowledge.

Applicant (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #1 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #2 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Witnessed in the presence of Sponsor Club/District Representative (name and title)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature

LIMITED RELEASE OF LIABILITY AND COVENANT TO COLLECT DAMAGES ONLY FROM APPLICABLE INSURANCE

We fully understand the nature of being an exchange student and the risk of injury or loss of property associated with an exchange. We understand that these risks are likely greater than they would be if a student were living in his or her home country.

IN CONSIDERATION of the acceptance and participation of the applicant in the Rotary Youth Exchange Program, we hereby release and agree to defend, hold harmless, indemnify, and covenant not to collect damages from:

- Rotary International (including all members, officers, directors, committee members, chaperones, and employees of Rotary International);
- The host and sponsor Rotary Club and Rotary District (including all members, officers, directors, committee members, chaperones, and employees of the host and sponsor Rotary clubs and districts; and
- All host parents and members of their families (collectively "RYE program")

for those **damages that are over above those covered by applicable insurance policies** from any or all liability for any loss, property damage, personal injury, or death, including any liability that may arise out of any negligent act or omission, which may be suffered or claimed by the applicant, parent, or guardian during (or as a result of) the participation by the applicant in the Rotary Youth Exchange program, including travel to and from the host country. We understand that the RYE Program **shall remain responsible for any damages caused by its negligence to the extent of any applicable insurance.**

Applicant (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #1 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #2 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Witnessed in the presence of Sponsor Club/District Representative (name and title)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature



Rotary Youth Exchange – Long-Term Exchange Program

Section G: Rules, Attestations, Permissions, Releases & Consents

PERMISSION FOR MEDICAL CARE AND RELEASE OF MEDICAL RECORDS AND LIABILITY

We, the parents/legal guardians of the applicant, and I, the applicant, **HEREBY DECLARE and confirm:**

- that the Medical Sections C-1 and C-2 with Dental Section D of this application include ALL health information known to us/me understanding that incomplete Medical or Dental Sections may lead to an early termination of the exchange.
- that the exchange student will be fully vaccinated according to the requirements of the receiving host country, host Rotary district or school.
- that **if additional medical issues arise between the completion of this application form and the exchange departure date, sponsor and host districts will be notified immediately.**
- We/I further authorize the Rotary Youth Exchange Officer, the Rotarian Counselor and/or the host parent to serve as my child's/my representative for the purpose of receiving medical information and communicating with medical providers about my child's/my medical condition.

We, the parents/legal guardians of the applicant, and I, the applicant, **HEREBY AUTHORIZE release** of the aforementioned Medical Sections C-1 and C-2 with Dental Section D which provide all health information included with this application.

We, the parents/legal guardians of the applicant, and the applicant, if of legal age, who have the sole and legal right to make the decisions on the health and care of the applicant, do **release from liability and grant permission** as noted of the following while our son/daughter/ward is overseas as a Rotary Youth Exchange Student:

- In the event of accident or sickness, we/I authorize any Rotarian, authorized chaperones of Rotary activities and/or host parent(s) of student to select the appropriate medical facility and physicians(s)/dentist(s) to provide treatment.
- In the event of accident or sickness, we/I authorize treating medical providers to release personal health information to any Rotarian, authorized chaperones of Rotary activities, and/or host parent(s) of student to the extent necessary to decide whether to consent to medical or dental treatment. This authorization is intended to release confidential medical information that might otherwise be protected by applicable medical confidentiality laws.
- We/I give permission for any operation, administration of anesthetic, or blood transfusion that a medical practitioner may deem necessary or advisable for the treatment of our son/daughter/ward.
- We/I further consent to any medical or surgical treatment by a licensed physician, surgeon, or dentist that might be required by our son/daughter/ward for any emergency situation. We do request that we be notified as soon as possible, but emergency treatment need not be delayed to provide such notice.
- Permission is granted for any additional immunizations required for school registration.
- In the case of elective surgery, we/I request that we/I be notified and our permission obtained before such arrangements are made.

We agree to hold harmless Rotary International, any Rotary district, Rotary club, Rotarian, Rotary chaperone, or host family for any intervention in an emergency situation regardless of final outcome.

We agree to assume all financial obligation for any medical treatment rendered (whether or not covered by insurance).

Applicant (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #1 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #2 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Witnessed in the presence of Sponsor Club/District Representative (name and title)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature

GENERAL NOTE ABOUT APPLYING SIGNATURES:

Basic electronic signatures can be applied using the Adobe Fill & Sign Tool without click on signature field. Fill & Sign Tool is available in Adobe Reader (or full version Acrobat). Other tools for electronic signatures may be suggested by the Sponsor District. Leave signature fields empty to print and apply ink signature for scanned copies. Doing all signatures the same way is usually best, but ink and basic electronic signatures can sometimes be successfully used together.

Follow RYE Sponsor District instructions regarding suitable signatures for this application.



Rotary Youth Exchange – Long-Term Exchange Program

Section G: Rules, Attestations, Permissions, Releases & Consents

Rotary Youth Exchange Application Privacy Statement

If you are accepted into the long-term Rotary Youth Exchange program, this application and the information contained within will be shared with relevant Rotary entities including your sponsoring club and home district plus the district and club that will be hosting your exchange, according to the policies of these Rotary-certified sponsoring and hosting districts. This information may also be shared with others involved with conducting the program, including exchange counselors and host parents. Any personal data shared will be processed in accordance with all applicable laws.

Personal data will be processed only by authorized youth exchange officials. Your application will be secured and protected. When sharing any information from this application, only the portions which are appropriate and necessary will be provided to your host school, your medical providers and dentists, Rotary counselor(s), program coordinators and host parents.

Personal data will be retained only as long as needed to conduct the exchange program. This will include a temporary period after the conclusion of your exchange for administrative purposes such as complying with data retention requirements of applicable law; assembling district and regional exchange program summary reports and statistical tallies; completion of certification audits; and post-exchange follow-up communications for program evaluation. No sooner than two (2) years and no later than five (5) years following the originally-scheduled conclusion of your exchange, unless separately consented otherwise, your personal records will be destroyed according to the policies or practices of your sponsoring and hosting districts including paper shredding and/or purging of electronic data in compliance with the laws and regulations applicable for each participating location.

Students may request correction or deletion of personal data using the same contact information provided for submitting this application or by contacting the youth exchange chairperson for the applicable Rotary sponsor or host district.

Rotary International ("RI"), headquartered in Evanston, Illinois, USA, is the global organization that charters Rotary clubs. RI certifies Rotary Districts meeting standards for participation in youth exchange programs. RI will not receive a copy of this application.

CONSENT TO USE OF PERSONAL DATA

I acknowledge that before beginning this application I was provided the above application privacy statement and translation, if needed, which I have read and understand. I consent that my personal data including medical information may be collected, used and disclosed in compliance with local privacy laws by relevant Rotary entities as described above and including any sponsoring and hosting Rotary Youth Exchange Multidistricts as needed to: verify my eligibility; coordinate my exchange with international exchange partners, schools, and government agencies; and to facilitate my participation in Rotary Youth Exchange activities at home and abroad.

Applicant (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #1 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #2 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature

BASIC CONSENT REGARDING IMAGES AND RECORDINGS

I consent to anyone associated with the Rotary Youth Exchange program including Rotary members, host family members, and agents of the program ("Rotary") recording my voice and image by any means ("Recordings"). I understand Recordings may include audio, video or still photos.

I grant free of charge the right for Rotary to use Recordings depicting my image or voice in e-mails, newsletters or youth exchange program promotions including those shared by websites or social media. I understand that laws vary by country with regard to consents or releases for use of Recordings and that my sponsoring and hosting Rotary districts may or may not each provide relevant local policies, or request other consents or releases, either as part of this application or separately at a later date.

Applicant (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #1 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature
Parent/Legal Guardian #2 (full legal name)	Date (YYYY-MM-DD)	e-Signature (or ink on paper) - click only for digital signature

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange – Long-Term Exchange Program

Section F: Endorsements-Host Club, District & School (Guarantee Form / Visa Application Supporting Document)

Full Legal Name as on passport or birth certificate <i>(use uppercase for your FAMILY name; e.g., John David SMITH)</i>		Name You Wish to be Called		Male Female Non-Binary
Place of Birth (City, State/Province, Country)	Country of Citizenship	Country of Residence	Date of Birth (YYYY-MM-DD)	

(A) HOST CLUB AND DISTRICT GUARANTEE

The Rotary Club and Rotary District specified within this section will provide room and board in approved homes, provide up to one year of study at the secondary school level, invite the applicant to participate in Rotary club and district events and activities typical of the host country, and provide guidance and supervision to assure the applicant's welfare. The host Rotary club will also give the applicant an allowance as specified below. The host Rotary District agrees to ensure appropriate screening, selection and training for host families and Youth Exchange volunteers and orientation for the student upon his/her arrival.

Host Country		Host Club Name			Host Club ID #	
Host District #	Monthly Allowance	Final Arrival Airport in Host Country		Airport Code	Arrival Date(s)	
Name of District Youth Exchange Chair		Name of Host Club President		Name of Host Club Youth Exchange Officer		
Signature of Host District Youth Exchange Chair		Signature of Host Club President		Signature of Host Club Youth Exchange Officer		
Date (YYYY-MM-DD)	Home Phone Number	Date (YYYY-MM-DD)	Home Phone Number	Date (YYYY-MM-DD)	Home Phone Number	
Skype ID	Mobile Phone Number	Skype ID	Mobile Phone Number	Skype ID	Mobile Phone Number	
E-mail Address of District Youth Exchange Chair		E-mail Address of Host Club President		E-mail Address of Host Club Youth Exchange Officer		

(B) HOST CLUB COUNSELOR

Name			E-mail Address		
Address - Street		City	State/Province	Postal Code	Country
Home Phone Number	Business Phone Number	Mobile Phone Number	Skype ID		

(C) SCHOOLING GUARANTEE

(To be completed by the school the applicant will attend in host country.) The applicant will attend school from date of school start for one school year. Costs of tuition and activities not a part of the normal curriculum must be paid by the applicant or his/her parents/guardians.

Name of School		Phone Number	Fax Number	Date School Starts (YYYY-MM-DD)	
Address - Street		City	State/Province	Postal Code	Country
School's Logo, Stamp or Official Seal may be used here	Name of School Official		Signature of School Official		
	Title				
	E-mail Address		Date (YYYY-MM-DD)		

(D) FIRST HOST FAMILY

Name of Host Parent #1		Host Parent #1's E-mail Address	Business Phone	Mobile Phone	
Name of Host Parent #2		Host Parent #2's E-mail Address	Business Phone	Mobile Phone	
Host Family Home Address - Street		City	State/Province	Postal Code	Country
Home Phone Number	Names and Ages of any Other Adults (18 years of age or older) in the Home				

HOST DISTRICT: Please return the electronically completed Endorsements/Guarantee Form to:

Sponsor District/Multidistrict/Country Contact:	
---	--

Rotary Youth Exchange – Long-Term Exchange Program

Section E: Endorsements-Sponsor Club; Guarantees-Student & Parents

Full Legal Name as on passport or birth certificate (<i>use uppercase for your FAMILY name; e.g., John David SMITH</i>)		Name You Wish to be Called		Male Female Non-Binary
Home Address - Street	City	State/Province	Postal Code	Country
Postal Address (<i>if different</i>) - Street	City	State/Province	Postal Code	Country
E-mail Address	Skype ID	Mobile Phone Number		
Place of Birth (<i>City, State/Province, Country</i>)	Citizen of (<i>Country</i>)	Date of Birth (<i>YYYY-MM-DD</i>)		

(A) APPLICANT GUARANTEE: I, the applicant named above, agree to do the following: (1) Purchase round-trip air travel before I depart my home country; (2) abide by the rules and decisions of the program, accepting advice and supervision of my hosts; (3) attend all orientations and trainings offered by my sponsor and host districts and clubs; (4) not request permission to stay in my host country, and (5) return home after completion of my exchange.

(B) PARENT/LEGAL GUARDIAN GUARANTEE: We, the parents/legal guardians of the above applicant agree to do the following: (1) Pay all costs of transportation, passport and visa; (2) pay costs for health and accident or travel insurance, as per program rules; (3) pay for clothing for the applicant's welfare and any uniforms required; (4) pay additional costs as circumstances arise, e.g., provide an emergency fund, if required by host district, under control of the host Rotary club/district to be returned at completion of the exchange if not used; (5) attend orientation meetings; (6) abide by program rules and follow host district policy on visiting the applicant while he/she is abroad.

The Undersigned APPLICANT and PARENT/GUARDIANS hereby agree to the Applicant's and Parents'/Guardians' Guarantee (A and B) and that the applicant is permitted to travel to the host district, live with approved families for up to one year, and attend secondary school. They hereby also authorize the host district to receive all necessary documents regarding application for visa.

e-Signature (Applicant) (or ink on paper)	Home Phone Number	Date (YYYY-MM-DD)	
e-Signature of Parent/Legal Guardian #1 (or ink on paper)	Date (YYYY-MM-DD)	Mobile Phone Number	E-mail
e-Signature of Parent/Legal Guardian #2 (or ink on paper)	Date (YYYY-MM-DD)	Mobile Phone Number	E-mail
Witness Name: Sponsor Rotary Club member e-signature (or ink on paper)	Date (YYYY-MM-DD)	Mobile Phone Number	E-mail

(C) SPONSOR CLUB AND DISTRICT ENDORSEMENT

The Rotary Club and Rotary District specified within this section, having interviewed the applicant and his/her parents/legal guardians and having reviewed the student's application and related documents, hereby endorse the student as qualified for Rotary Youth Exchange and recommend to host clubs and host districts the acceptance of this student. The District agrees to provide adequate orientation to the student and parents before the student's departure.

Sponsor District #		Sponsor Club Name		Sponsor Club ID #	
Name of District Youth Exchange Chair		Name of Sponsor Club President		Name of Sponsor Club Youth Exchange Officer	
Street Address of District Youth Exchange Chair		Street Address of Sponsor Club President		Street Address of Sponsor Youth Exchange Officer	
City, State/Province, Postal Code of District YE Chair		City, State/Province, Postal Code of Sponsor Club President		City, State/Province, Postal Code of Sponsor Club YEO	
E-mail Address of District Youth Exchange Chair		E-mail Address of Sponsor Club President		E-mail Address of Sponsor Youth Exchange Officer	
e-Signature of District YE Chair (or ink on paper)		e-Signature of Sponsor Club President (or ink on paper)		e-Signature of Sponsor Club YE Officer (or ink on paper)	
Date (YYYY-MM-DD)	Home Phone Number	Date (YYYY-MM-DD)	Home Phone Number	Date (YYYY-MM-DD)	Home Phone Number
Mobile Phone Number	Business Phone Number	Mobile Phone Number	Business Phone Number	Mobile Phone Number	Business Phone Number
Skype ID for District Youth Exchange Chair		Skype ID for Sponsor Club President		Skype ID for Club Youth Exchange Officer	

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange – Long-Term Exchange Program

Section D: Dental Health and Examination

Dentist: This student is considering a year abroad as an exchange student. Insufficient, inadequate, or improper information about the student's dental health, medications, or other problems could endanger this student while overseas. An immediate relative of the student may **not** complete the dental examination.

Use computer entry if possible. Consult Rotary Sponsor District Instructions for required copies and signatures. Print specified number of completed copies first for ink signatures on paper (if required). Electronic signature may be applied last if both paper and electronic signatures are needed.

Full Legal Name as on passport or birth certificate (use uppercase for FAMILY name; e.g. John David SMITH)		Date of Birth (YYYY-MM-DD)		Male Female Non-Binary
Home Address – Street	City	State/Province	Postal Code	Country
Email Address		Home Phone Number	Mobile Phone Number	

Dental Examination Date (YYYY-MM-DD):

1. Is the applicant in good dental health?	Yes	No
2. Does the applicant require dental work at this time?	Yes	No
3. Do you foresee the applicant requiring any dental work while abroad?	Yes	No
If yes, please explain below (use space at bottom or additional pages if needed):		

Enter any additional comments below. If additional pages are necessary, attach them and please check here

CERTIFICATION

I certify that I hold a valid current license to practice dentistry and am not an immediate relative of the patient, and that I have personally examined the applicant and reported my findings as noted herein.

Dentist address, phone, fax and E-mail	Dentist Name
	Dentist Signature (ink on paper) or basic e-signature (using Fill & Sign)
	Date (YYYY-MM-DD)











Rotary Youth Exchange – Long-Term Exchange Program

Section C-1: Medical History & Examination

Page 1 of 3

Physician: This student is considering a year abroad as an exchange student. Insufficient, inadequate, or improper information about medications or psychiatric, psychological, or other medical problems could endanger the student's life while overseas. Allergy information is especially crucial to host family placement and student well-being. An immediate relative of the applicant may **not** complete the examination or fill out this form.

Use computer entry if possible. Consult Rotary Sponsor District Instructions for required copies and signatures. Print specified number of completed copies first for ink signatures on paper (if required). Electronic signature may be applied last if both paper and electronic signatures are needed.

Full Legal Name as on passport or birth certificate (use uppercase for FAMILY name; e.g. John David SMITH)		Date of Birth (YYYY-MM-DD)		Male Female Non-Binary
Home Address – Street	City	State/Province	Postal Code	Country
E-mail Address	Home Phone Number		Mobile Phone Number	

Medical History

1. How long has the applicant been the patient of the physician?		
2. Has the applicant ever been diagnosed with or received treatment, attention, or advice from a physician or other practitioner for:		
Yes	No	Yes No
a. Allergies	n. Liver disease/hepatitis	
b. Anorexia/bulimia/other eating disorder*	o. Malaria	
c. Appendicitis	p. Menstrual disorders	
d. Arthritis	q. Mental disorders*	
e. Asthma	r. Pneumonia	
f. Attention deficit disorder*	s. Rheumatic fever	
g. Bowel problems	t. Serious headache/migraine	
h. Cancer	u. Stomach ulcer	
i. Diabetes	v. Typhoid fever	
j. Epilepsy/seizures	w. Urinary tract infection	
k. Hearing loss	x. Vertigo/dizziness	
l. Heart disease	y. Visual correction – eyeglasses/contact lenses	
m. Hernia	z. Vision problems – other	
3. Has the applicant:		Yes No
a. Had any surgical operation not revealed in question 2, or gone to a hospital, clinic, dispensary, or sanatorium for observation, examination, or treatment not revealed in question 2?		
b. Taken any prescribed medication in the past six months?		
c. *Presented any history or current evidence of nervous, emotional, or mental abnormality, functional nervous breakdown, nervous fatigue, depression, suicide attempts, eating disorders, or antisocial behavior?		
d. Ever used heroin, cocaine, marijuana or other hallucinogens, amphetamines, or other street drugs?		
e. Ever received treatment for or advice about a problem with alcohol or drug use, either from a physician/other practitioner or an organization that assists those who have an alcohol or drug problem?		
f. Had excessive weight gain or loss recently?		
g. Suffered chest pain, wheezing, shortness of breath, or fainting episodes?		
h. Suffered chronic diarrhea, vomiting, abdominal pain, or constipation?		
i. Exhibited chronic skin conditions (e.g., severe acne, eczema, psoriasis)?		
j. Suffered weakness of neurological or muscular skeletal system?		
k. Had any dietary restrictions? If yes, specify and note reason (medical, religious, personal choice):		
If you answered "Yes" for any parts of questions 2 and 3, please explain (except non-medical dietary restrictions): *Affirmative answers to questions 2b, 2f, 2q, and/or 3c require a letter of explanation from the treating physician		
Question (e.g., 2e)	Nature and severity of disorder, diagnosis, frequency of attack, prognosis, and treatment	Dates and duration

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange – Long-Term Exchange Program

Section C-1: Medical History & Examination

Page 2 of 3

4. Indicate year when the applicant had the following infectious diseases (or indicate that he or she has not). Use Part 5 comments for other details.			
Measles (rubeola) No Yes, year _____	Mumps No Yes, year _____	Hepatitis (if so, see comments) No Yes, year _____	Whooping cough (pertussis) No Yes, year _____
Rubella (German measles) No Yes, year _____	Varicella (Chicken Pox) No Yes, year _____	Scarlet fever No Yes, year _____	Other: No Yes, year _____

5. Immunization Information <i>(may be completed by medical records, nursing or appropriate personnel and verified by physician)</i> Please verify that these ISO format dates match the official source documents provided in "Section C-2: Immunization Records/Certification copies"							
The applicant has been immunized against the following diseases:	Dates of immunizations Using ISO format (YYYY-MM-DD) enter the dates of ALL doses received. Immunizations are a prerequisite to school attendance in many locations. Requirements vary. The host country, host Rotary district and/or school may require additional immunizations.						
	1 st	2 nd	3 rd	4 th	5 th	6 th	7 th
Diphtheria							
Pertussis (whooping cough)							
Tetanus							
Rubella (German measles)							
Mumps							
Measles (rubeola)							
Polio Sabin TOPV (3 or more) Salk IPV (4 or more)							
Varicella (Chicken Pox/Shingles)							
Hepatitis B							
Hepatitis A							
Yellow Fever							
Japanese Encephalitis							
Meningococcal Meningitis							
Typhoid							
COVID-19 Manufacturer or Name:							
Others (specify):							
Additional Comments: (Examples: Other COVID-19 vaccine manufacturer(s) for later doses, hepatitis lab test results, other immunizations, vaccine adverse reactions)							

6. Tuberculosis screening: The applicant must present evidence of recent TB screening (within 3 months of examination date) by skin test or blood test.	
Date of screening (YYYY-MM-DD) _____	Result/diagnosis: _____ Method: TB Skin test (TST) TB Blood test (IGRA)
Please document any BCG vaccine dose(s), diagnostic studies or treatments related to tuberculosis not included in above immunizations or comments.	



Rotary Youth Exchange – Long-Term Exchange Program

Section C-1: Medical History & Examination

Page 3 of 3

7. Will the applicant be bringing any prescribed medication on the exchange? Yes ☐ No ☐

If yes, please list each medication, including the international and generic names, compound symbols, dosage, frequency and reason for use

Prescribed Medication	Dose/Frequency	Reason for Use

Physical Examination

Date: (yyyy-mm-dd)	Height: (cm)	Weight: (kg)	Blood Pressure: Systolic (mmHg)	Diastolic	Pulse: (rate/minute)
-----------------------	-----------------	-----------------	------------------------------------	-----------	-------------------------

8. Does today's examination show any abnormal findings for:

Yes	No	Yes	No	Yes	No	Not done	Yes	No
Head and neck		Abdomen		Skin		Breasts		
Ear, nose, throat		Hernias		Extremities		Genitalia (external)		
Chest/lungs		Lymph nodes		Spine/Skeletal		Rectal		
Heart				Neurological		Not done (See below)		

Examination of Breasts and External Genitalia is at physician discretion. Rectal exam is not required if bowel history and abdominal exam are normal.

For any "YES" (abnormal) in part 8, above, please note details in the space below with any other comments or recommendations.

If more space is needed, please provide on separately signed typewritten or computer-generated page(s) with applicant's full name and date of birth.

OTHER notes: Physical Examination findings, comments or recommendations, if any:

CERTIFICATION

I certify that I hold a valid current license to practice medicine and am not an immediate relative of the patient, and that I have personally examined the applicant and reported my findings as noted above and the attached page(s). If additional pages are attached, please check here:

I find the applicant:

In good health and not suffering from any mental or medical condition(s) that would preclude participation in the Rotary Youth Exchange program.

Suffering from mental or medical condition(s) as noted in my report that could impact his/her participation.

Additionally, I find the applicant in good health and not suffering from any condition(s) that would preclude participation in sporting/physical activities of the applicant's choice Yes No

Physician address, phone, fax and E-mail	Physician Name
	Physician Signature (ink on paper) or basic e-signature (using Fill & Sign); click only for digital signature
	Date (YYYY-MM-DD)

If there are separate pages, including any Letter(s) of explanation from treating physician(s), please append following this page.



Rotary Youth Exchange – Long Term Exchange Program

Section B: Letters & Photos

Page 1

Submit these pages from Section B:

See upper right part of page
for Section Page numbers

Page 1 (Instructions)

Page 2a (Student's Letter)

Page 3a (Parents Letter)

Page 4 (Photos)

Optional Pages (Not needed if empty):

Page 2b (Student's Letter)

Page 2c (Student's Letter)

Page 3b (Parent's Letter)

Student's Letter

Write a letter introducing yourself to your future host club and host families. Keep in mind that this will be their first impression of you. Incorporate your answers to the following questions in your letter, providing as much detail as possible (if you need help generating details, also consider the italicized questions in parentheses). Do not copy the questions. Please use these questions as a suggested guide for topics to include in your letter.

How to create your letter:

- I. Enter your letter on the following "Student's Letter" pages by keying in your text or using "copy and paste". Maximum length: 3 pages.
- II. Use clear sentences that can be easily understood by your future hosts. Even if they understand English well, you should avoid abbreviations, idioms, contractions, slang and local jargon. If you include local names (company, store, town) you may need to provide additional information.

1. What do you do when you have free time?
2. What do you do at your school? (*How many subjects do you take? What are they? How long are the classes? What is your daily schedule during the school year? Start with when you wake-up and discuss only one typical day's schedule.*) Are you able to choose courses at your school? If so, which courses did you choose, and why?
3. What are your school interests and activities? What leadership positions have you held?
4. How would you describe your home? (*Do you have your own room, or do you share your room with others? Where in your house do you study? How far is your home from your school? Do you drive, ride a bus, or walk to school?*)
5. What are the occupations of your parents? (*What product or service does each make or perform? What is their position or title?*)
6. How would you describe your community? (*Is it in or near a major city? What is the population? industry? economy?*)
7. What are your interests and accomplishments? (*Are you interested in art, literature, music, sports, other activities? How did you become interested in the activity? How long have you been interested? How much time do you devote to the activity?*)
8. What trips have you taken outside your country? Tell us about your experience(s) abroad, if any:
9. What things do you dislike? (*Do you dislike certain foods, animals, treatment by other people etc.?*)
10. What do you feel are your strong and weak characteristics? What would you like to improve about yourself?
11. What are your plans and ambitions for your education and career? Why?
12. If you have previously been on any exchange, write about your experiences, the host country you went to and the length of your exchange.
13. What do you specifically hope to accomplish as an exchange student, both during your exchange and when you return?

Parent's Letter

Write a letter to your child's host club and families, incorporating answers to the following questions. Do not copy the questions, themselves.

How to create your letter:

- I. Enter your letter on the following "Parent's Letter" pages by keying in your text or using "copy and paste". Maximum length: 2 pages.
- II. Use clear sentences that can be easily understood by non-native English readers. Even if they understand English well, you should avoid idioms, abbreviations, contractions, slang and local jargon. If you include local names (company, store, town) you may need to include other information.

1. How would you describe your child's relationship with you and your family? with his/her friends?
2. How does your child react to disagreement, discipline, and frustration?
3. How does your child handle challenging or difficult situations?
4. What amount of independence do you give to your child? What is your child's level of maturity?
5. What makes you proud of your child?
6. Why do you want your child to be an exchange student?
7. Are there any other comments you would like to share with the host families?

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange - Long Term Exchange Program

Section B: Letters & Photos

Student's Letter Page 2a

Enter first page below. Use plain text only.

Continue on next page, if needed.

Too much entry will make text smaller. Text should be This Big. If not, remove some text to get the full size Continue letter on the next page.

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange - Long Term Exchange Program

Section B: Letters & Photos

Student's Letter Page 2b

Enter second page below. Use plain text only.

Continue on next page, if needed.

Too much entry will make text smaller. Text should be This Big. If not, remove some text to get the full size. Continue letter on the next page.

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange - Long Term Exchange Program

Section B: Letters & Photos

Student's Letter Page 2c

Enter third page below. Use plain text only.

Last page available

*Too much entry will make text smaller. Text should be **This Big.** If not, remove some text to get the full size. Maximum of 3 pages allowed.*

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange - Long Term Exchange Program

Section B: Letters & Photos

Parent's Letter Page 3a

Enter first page below. Use plain text only.

Continue on next page, if needed.

Too much entry will make text smaller. Text should be This Big. If not, remove some text to get the full size. Continue letter on the next page.

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange - Long Term Exchange Program

Section B: Letters & Photos

Parent's Letter Page 3b

Enter second page below. Use plain text only.

Last page available

Too much entry will make text smaller. Text should be This Big. If not, remove some text to get the full size. Maximum of 2 pages allowed.

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange - Long Term Exchange Program

Section B: Photos

Letters & Photos

Page 4

Student's Photos

Select a good quality color photograph for each topic below, and digitally insert each photo to this page. Include brief captions to describe the photos and remember you are leaving a FIRST IMPRESSION! **(Digital insertion of photos works best with ADOBE ACROBAT or ADOBE READER)**

MY FAMILY	MY SPECIAL INTEREST
<p>CLICK HERE TO INSERT</p> <p><i>Photo that includes members of your immediate family</i></p> <p><i>In the box beneath the photo, please enter a description that clearly identifies each person</i></p>	<p>CLICK HERE TO INSERT</p> <p><i>Photo of you participating in your favorite hobby or activity</i></p> <p><i>In the space beneath the photo, please describe your interest and how long you have participated.</i></p>
SOMETHING IMPORTANT TO ME	MY HOME
<p>CLICK HERE TO INSERT</p> <p><i>Photo of your friends, pet, musical instrument, etc.</i></p> <p><i>In the space beneath the photo, please describe what is shown and how or why it is important to you.</i></p>	<p>CLICK HERE TO INSERT</p> <p><i>Photo of your house or building where you live</i></p> <p><i>In the space beneath the photo, please describe your home, where it is located and how long you have lived there.</i></p>

Sponsor District: _____



Rotary Youth Exchange Long-Term Exchange Program

APPLICATION

Section A: Personal Information

Page 1 of 3

Smile!

Provide a recent, good-quality color photo of yourself (head and shoulders). Make sure your entire head is fully visible. Do not include other people or props in the photo.

[CLICK HERE TO INSERT THE PHOTO](#) digitally into the document.

Size: 2 x 2½ in. (5 x 6.5 cm)

(Works best with **Acrobat Reader** or with **Adobe Acrobat**)

Before you begin your application, be sure to read *all instructions on the prior page.*

1. Applicant Information

Full Legal Name as on passport or birth certificate <i>(use uppercase for your FAMILY name; e.g. John David SMITH)</i>				Name You Wish to be Called		Male Female Non-Binary	
Home Address – Street			City		State/Province		Postal Code
Postal Address <i>(if different)</i> - Street			City		State/Province		Postal Code
E-mail Address			Skype ID		Home Phone Number		Mobile Phone Number
Place of Birth <i>(City, State/Province, Country)</i>				Citizen of <i>(Country)</i>		Date of Birth <i>(YYYY-MM-DD)</i>	

2. Parent/Legal Guardian Information

Full Name of Parent/Legal Guardian #1				Full Name of Parent/Legal Guardian #2			
Rotarian? Yes No		If yes, name of Rotary Club		Rotarian? Yes No		If yes, name of Rotary Club	
Address – Street		City		Address – Street		City	
State/Province		Postal Code		Country		State/Province	
Email-Address				Email-Address			
Occupation				Occupation			
Home Phone Number		Mobile Phone Number		Home Phone Number		Mobile Phone Number	
Business Phone Number		Skype ID		Business Phone Number		Skype ID	
In the event of an emergency, which parent or legal guardian should be contacted first (you must select one)? Parent/Legal Guardian #1 Parent/Legal Guardian #2				Mark this box if your parents are divorced or separated. <i>Authorizations must be obtained from all parents/legal guardians and others who have legal rights to decisions affecting the student's participation. Explanation is required if signatures of two parents or legal guardians are not provided.</i>			

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange Long-Term Exchange Program

Section A: Personal Information

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3. Sponsor District and Rotary Club

Sponsor District Number	Name of Sponsor District Youth Exchange Chair	E-mail Address
Sponsor Rotary Club	Name of Sponsor Club Youth Exchange Officer	E-mail Address

4. Personal Background

Religion (Identify by name or "None")	Dietary Restrictions (Enter "None", or explain with details – e.g., vegetarian, vegan, allergic to...)
Do you smoke or use tobacco products? Yes No	If yes, please explain.
Do you drink alcohol? Yes No	If yes, please explain.
Have you ever used illegal drugs? Yes No	If yes, please explain.
Do you have a steady boy/girlfriend? Yes No	If yes, how will being abroad impact your relationship and how might the relationship impact your exchange experience?
Answering yes to these questions will not automatically eliminate you as a candidate; however, it may require special consideration of host family or country assignments.	

5. All Siblings (plus any other family members living in your home)

Relationship examples: "brother" "step-sister" "grandmother" "step-father" "foster brother" "niece" "cousin" etc.

Name	Relationship	Age	Occupation or School Grade/Level	Living in your Home?
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No
				Yes No

Sponsor District: _____

Applicant Name: _____



Rotary Youth Exchange Long-Term Exchange Program

Section A: Personal Information

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6. Languages

Your Native Language(s)		Proficiency in Non-Native Language(s) (Indicate: Poor, Fair, Good, or Fluent)		
Non-Native Language(s) <i>If you have received a foreign language certificate (e.g. DELF, DELE, etc.), please use Section H-2 to provide a copy with this application.</i>	Years Studied	Speaking	Reading	Writing

7. Exchanges

Have you previously participated in any exchange ?	No	Yes	If yes, please explain in your student letter
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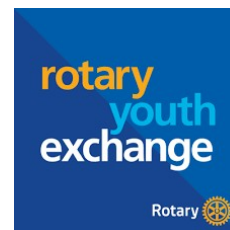
8. Secondary School Information

Name of Secondary School You Currently Attend		School Phone Number		School Fax Number	
Address – Street		City	State/Province	Postal Code	Country
Maximum grade level in secondary schools	Your current grade level (e.g., 10 th , 11 th)	Month and year you expect to graduate		No. of years you've attended this school	
List the courses you are currently taking					
Consult with a school official or guidance counselor to find out the following information:					
Total number of students at your school	Number of students in your grade level		Your approx. class ranking (e.g., top 10%, 12 th of 56)		
Name and title of school official or counselor that you consulted			E-mail address of school official or counselor		
In Section H-2, add a transcript, in English, of all secondary school courses completed with grades you received. Also include your most recent grade report from the current year.					

9. Alternative Emergency Contact in home country, OTHER THAN A PARENT/GUARDIAN



Name		Relationship			
Home Address – Street		City	State/Province	Postal Code	Country
E-mail Address	Home Phone Number	Business Phone Number		Mobile Phone Number	

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 7 – DG Certification

2023-2024_RYE_Certification_Requirements

This document outlines the Certification Requirements to participate in Rotary Youth Exchange. If you have any questions or concerns related to Rotary Youth Exchange, please reach out to youthexchange@rotary.org

*Pages 1-9 apply to [traditionally certified](#) (sending and hosting students) districts.
Pages 10-16 apply to [outbound-only certified](#) (sending, not hosting students) districts.*

2023-24 TRADITIONAL CERTIFICATION REQUIREMENTS

District Governor Authority

- ☐ The district governor is responsible for the supervision and control of the Youth Exchange program within the district. The district Youth Exchange officers, or committees, are under the supervision of their respective governors and report to them.
- ☐ Governors are required to complete youth protection training as determined by the general secretary before the start of their term.
- ☐ The district complies with the Youth Protection and Rotary Youth Exchange sections of the Rotary Code of Policies ([RCOP](#)).
- ☐ Exchanges are arranged within the structure of the district Youth Exchange program.
- ☐ The district has a system to ensure club compliance with district Youth Exchange policies.

Youth Protection

- ☐ The district has adopted the Statement of Conduct for Working with Youth.
- ☐ The district has adopted RI's zero-tolerance policy against abuse and harassment.
- ☐ The district has developed a procedure for contacting the student's parents or legal guardians as well as the sending district and club once an allegation is brought forth.
- ☐ The district has established reporting procedures, ensuring all volunteers understand their responsibility to report incidents to RI, and to ensure that only those who need to know are informed of an allegation in order to protect the privacy

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This document outlines the Certification Requirements to participate in Rotary Youth Exchange. If you have any questions or concerns related to Rotary Youth Exchange, please reach out to youthexchange@rotary.org.

*Pages 1-9 apply to **traditionally certified** (sending and hosting students) districts. Pages 10-16 apply to **outbound-only certified** (sending, not hosting students) districts.*

2023-24 TRADITIONAL CERTIFICATION REQUIREMENTS

District Governor Authority

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- ☐ Governors are required to complete youth protection training as determined by the general secretary before the start of their term.
- ☐ The district complies with the Youth Protection and Rotary Youth Exchange sections of the Rotary Code of Policies ([RCOP](#).)
- ☐ Exchanges are arranged within the structure of the district Youth Exchange program.
- ☐ The district has a system to ensure club compliance with district Youth Exchange policies.

Youth Protection

- ☐ The district has adopted the Statement of Conduct for Working with Youth.
- ☐ The district has adopted RI's zero-tolerance policy against abuse and harassment.
- ☐ The district has developed a procedure for contacting the student's parents or legal guardians as well as the sending district and club once an allegation is brought forth.
- ☐ The district has established reporting procedures, ensuring all volunteers understand their responsibility to report incidents to RI, and to ensure that only those who need to know are informed of an allegation in order to protect the privacy

of both the victim and accused during the investigation.

- ☐ Any person involved in a Rotary youth program against whom an allegation of sexual abuse or harassment is made must be removed from all contact with youth until the matter is resolved.
- ☐ The district has a procedure for moving a student into temporary housing if the accused individual is a member of the student's host family.
- ☐ The district has identified appropriate support services for students who report abuse or harassment, including appointment of non-Rotary counselors for each student.
- ☐ Any allegation of abuse must be immediately reported to the appropriate law enforcement agency not affiliated with Rotary, in accordance with RI's zero-tolerance policy.
- ☐ A club must terminate the membership of any individual who admits to, is convicted of or is otherwise known to have engaged in sexual abuse or harassment of youth or youth program participants.
- ☐ A club may not grant membership to a person who is known to have engaged in sexual abuse or harassment.
- ☐ A Rotary member or non-Rotary volunteer who admits to, is convicted of, or is otherwise known to have engaged in sexual abuse or sexual harassment or other act of moral turpitude must be prohibited from working with youth in a Rotary context.
- ☐ Districts will maintain confidential records of prohibited individuals and ensure such prohibitions are implemented consistently throughout the district from year-to-year.
- ☐ If a district investigation into a claim of sexual abuse or harassment is inconclusive, then, for the safety of youth participants and the protection of the accused, additional safeguards must be put in place to assure the protection of any youth with whom the individual may have future contact. If there are subsequent claims of sexual abuse or harassment, the adult shall be permanently prohibited from working with youth in a Rotary context. A person who is accused but later cleared of charges, may apply to be reinstated to participate in youth programs. Reinstatement is not a right, and no guarantee is made that he or she will be reinstated to his or her former position.
- ☐ The district will conduct an independent and thorough investigation into any claims of sexual abuse or harassment to determine how to prevent a similar situation in the future.

- ☐ The district must develop a crisis management plan that meets RI Board [safety guidelines](#). A crisis management plan must be finalized before any in-person exchanges can take place.
- ☐ Due to student safety reasons, a district that loses its certification status during a current exchange year must terminate all inbound exchanges and students must return to their home countries. Outbound students of a district that loses its certification status may complete their exchange with the permission of their natural parents or legal guardians, and their respective host districts.

Legal Entity

- ☐ The district has established a corporation or similar formal legal entity that includes the district Youth Exchange program.

Liability Insurance

- ☐ The district has secured liability insurance for the district Youth Exchange program with coverage and limits appropriate for its geographic location.

For districts located wholly or partly in the United States, the U.S. Club and District Liability Insurance Program (Program) fulfills liability insurance requirements for the U.S. portion of that district. However, this Program does not apply to the non-authorized Youth Exchange activities or Youth Exchange activities not in compliance with the Rotary Youth Exchange certification program.

Program-specific Requirements

Even if your district is not currently active in each program listed below, your district must comply with the following should it participate in this program in the future.

Long-term Exchange Program

- ☐ Exchanges should be for one academic year but may be extended to include part or all of the holiday periods immediately preceding and immediately following the academic year.
- ☐ Students should have more than one host family; three successive host families are preferable. In the event that circumstances prevent multiple host family placements, both the sending and host district must agree in advance and alert the student's parent or legal guardian. At least one back-up host family must be available.
- ☐ Parents of outbound students are not required to host inbound students. However, parents of outbound students may volunteer to host or may be asked to assist in finding suitable host families.

- ☐ The sending and host club selects an individual Rotary counselor to be in regular contact with each student and to serve as a liaison between the student and the club, the student's parents or legal guardians, host family, and community at large. The club counselor must not be in a position of authority over the student's exchange, such as a member of the student's host family, district or club Youth Exchange officer, school principal, etc. The club counselor must be trained in responding to any problems or concerns which may arise during the exchange, including the prevention of physical, sexual, and psychological abuse.
- ☐ The sending and host club or district requires, at a minimum, quarterly reports from students. This report should include information on their current hosts, feelings, concerns, ideas, and suggestions regarding their exchange experience thus far. The designated Youth Exchange officer reviews the reports carefully and, when necessary, takes action to respond to any irregularities reported by the students.

Short-term Exchange Program

- ☐ Exchanges vary from several days to several weeks or months. They often take place when school is not in session and usually do not include an academic program; some feature a homestay, camp, or tour component.
- ☐ One host family is usually sufficient.
- ☐ The sending and host club selects an individual Rotary counselor to be in regular contact with each student and to serve as a liaison between the student and the club, student's parents or legal guardians, host family, and community at large. The club counselor is not in a position of authority over the student's exchange, such as a member of the student's host family, district or club Youth Exchange officer, school principal, etc. The club counselor must be trained in responding to any problems or concerns which may arise during the exchange, including the prevention of physical, sexual and psychological abuse.

Virtual Exchange Program

- ☐ Virtual exchanges are an alternative to in-person exchanges when travel is not possible.
- ☐ Districts must be aware of local laws related to data privacy and internet use involving minors, and provide volunteers and program participants with electronic and online safety training.

Student Application

- ☐ Candidates must submit a written application and must undergo a selection process including personal interviews with the applicant and the applicant's parents or legal guardians at the club level and at the district level.

Student Selection and Placement

- ☐ The sending district ensures that each student is accepted and hosted by a club in a partner district that has been certified by Rotary International to participate in the Youth Exchange program.
- ☐ All individuals involved in the exchange, including students and their parents or legal guardians, host family members, and Rotary counselors, agree in writing to all the requirements of the program as determined by the sending and host clubs or districts.
- ☐ Student travel itineraries are agreed upon by the students' parents or legal guardians and the host club or district.

Student Responsibilities

- ☐ Students cannot under any circumstances be permitted to operate or drive a motorized vehicle of any kind during the exchange, nor to own a motorized vehicle in the host country.
- ☐ Students shall not undertake travel outside the immediate area of the community in which the host club is located without the consent of the students' parents or legal guardians and of the participating clubs or districts.

Student Orientation & Debriefing

- ☐ The sending club or district organizes a mandatory orientation for students and their parents or legal guardians prior to departure.
- ☐ At orientation participants are informed about the rules, procedures and expectations associated with the Youth Exchange program and includes a briefing about the local Rotary and Rotaract clubs and their activities.
- ☐ The sending club or district provides abuse prevention and awareness training for both students and parents/legal guardians.
- ☐ The host club or district provides an orientation program for inbound students. The orientation includes guidance for students should they encounter any aspects of neglect, physical, sexual or psychological abuse and contact information for local resources and their appointed counselors.
- ☐ Because local laws and customs in one country may differ greatly from those in others, orientation for students includes information on local laws and customs, which may apply to young people.

- ☐ Due to the likely effects of reverse culture shock, following their return, students and their parents or legal guardians are encouraged to attend a debriefing meeting for the purpose of assisting them to transition to their home, school, and community environment.

Student Preparation

- ☐ The host and sending club or districts provide students with a list of individuals to contact in the case of a problem or emergency. This list must include the name and contact information for the student's:
 - Host club counselor
 - Host club president
 - Host district chair
 - Host district governor
 - Sending club president
 - Sending district chair
 - Sending district governor
 - Two non-Rotary resource persons (one male and one female)
- ☐ This list must also include local resources:
 - Medical care
 - Dental care
 - Mental health care
 - Law enforcement professionals
- ☐ Where available, this list should also include:
 - Suicide prevention hotlines
 - Rape crisis hotlines
 - Local child protection agencies
 - LGBTQ hotlines
- ☐ District provides a 24-hour emergency contact number or other means for ensuring that students can contact a district representative by telephone at all times.

Student Travel Insurance

- ☐ Evidence of student travel insurance coverage shall be submitted to, received by, and accepted by the host district prior to the student's departure from home. As the host Rotary district must be in a position to arrange immediate and emergency medical attention when it is needed, the host district must approve that the insurance coverage carried by the student is with a responsible insurance company and will ensure that any service providers receive complete and prompt payment. The parent or legal guardian of the Youth Exchange student is responsible for the payment of all medical and accident costs.

- ☐ Partner districts shall determine where there may be gaps in coverage, in any national insurance plans or travel insurance coverage, and identify and purchase supplemental coverage to meet the minimums.
- ☐ The parent or legal guardian of each student shall obtain travel insurance, including, but not limited to, medical and dental coverage for accidental injury and illness, repatriation of remains, emergency evacuation, 24-hour emergency assistance services, and personal legal liability. Such amounts shall not be less than the minimum limits and benefits per student designated in the RCOP.
- ☐ Parents or legal guardians may also consider obtaining additional travel insurance coverage options designated in the RCOP.
- ☐ Where it is a statutory or legal requirement for travel insurance to be purchased in the host country, such insurance shall be in accordance with these limits and benefits. In all other cases dual insurance should be avoided unless agreed to by all parties.
- ☐ Clubs and districts are strongly encouraged to consult insurance counsel for advice on obtaining liability insurance and other coverage and should be fully informed about government's policies and regulations regarding foreign students, including insurance coverage requirements.
- ☐ Participation in extreme sports, such as hang gliding, rock climbing, and bungee jumping, is discouraged. If students are allowed to participate in extreme sports, these activities should be undertaken with the host districts' and parent or legal guardian's written permission, and additional adequate insurance should be obtained.

Early Returns

- ☐ Any participant who does not comply with the requirements of the program is removed from participation in the program.
- ☐ The host and sending clubs and districts, host families, and the student's parents or legal guardians, are fully informed prior to the student being sent home. Such decision requires the agreement of the host and sending districts. The student should be returned home at the earliest practical time by a route agreed upon between the parents or legal guardians and the sending district. In the event of an impasse, districts may appoint an independent Rotary member to serve as a mediator.

Reporting to Rotary International

- ☐ District submits annual survey to RI.

- ☐ All incidents, including but not limited to, accidents, death, early returns, and crimes, and any allegations of abuse or harassment will be reported by the district to RI within 72 hours of the time a district officer learns of the incident. The district has identified a person within the district who will be responsible for reporting to RI.
- ☐ Where there is sufficient evidence that an individual, club or district knowingly failed to report an incident as required, the general secretary may determine whether and/or the extent to which involved parties may continue to be eligible to participate in Rotary's youth programs, or whether additional sanctions may be necessary, including but not limited to requiring the club to terminate an individual's membership.

Records & Documents

- ☐ The district has a retention policy for student, volunteer, and host family applications and materials related to Youth Exchange.
- ☐ The district complies with Rotary International's procedures for use of Rotary Marks as detailed in the most recent Manual of Procedure in district Youth Exchange promotional materials, including any email addresses and/or websites.

Volunteer Selection and Screening

- ☐ All adults (Rotary and non-Rotary members) involved in the program, including but not limited to committee members, host families, club counselors, and others, must be interviewed to determine suitability to work with youth, complete and sign a youth volunteer form, and agree to undergo background checks, including law enforcement public record checks and a reference check. Reference checks should entail asking three people about the individual's suitability to work with exchange students. These three people should not be family members and no more than one of the references should be a Rotary member.
- ☐ The host club or district conscientiously screens and selects host families on the basis of a written application, background checks for all adults in the home, including law enforcement public record checks and reference checks, personal interview, and home visits. Reference checks should entail asking three people about the individual's suitability to work with exchange students. These three people should not be family members and no more than one of the references should be a Rotary member. Announced and unannounced home visits should take place prior to exchanges and during long-term exchanges.
- ☐ Any participant who does not comply with the requirements of the program will be removed from participation in the program. In the case of adult volunteers (both Rotary and non-Rotary members), those who have not complied with program requirements will be permanently removed from involvement with youth in a Rotary context.

- ☐ Host families should carry personal liability and auto liability insurance with appropriate limits for their geographic location.

Volunteer Training

- ☐ The district Youth Exchange policy outlines the content and frequency of training, participants who must receive training, who has the responsibility for arranging and conducting training, and how records of participation are maintained.
- ☐ All adults (Rotary and non-Rotary members) involved in the program, including but not limited to committee members, host families, club counselors, and others, receive training that includes information on program administration and rules, and abuse and harassment awareness and prevention.

Program Evaluation

- ☐ All certified districts are subject to an in-person and/or virtual program evaluation.

2023-24 OUTBOUND-ONLY CERTIFICATION REQUIREMENTS

District Governor Authority

- ☐ The district governor is responsible for the supervision and control of the Youth Exchange program within the district. The district Youth Exchange officers, or committees, are under the supervision of their respective governors and report to them.
- ☐ Governors are required to complete youth protection training as determined by the general secretary before the start of their term.
- ☐ The district complies with the Youth Protection and Rotary Youth Exchange sections of the Rotary Code of Policies (RCOP.)
- ☐ Exchanges are arranged within the structure of the district Youth Exchange program.
- ☐ The district has a system to ensure club compliance with district Youth Exchange policies.

Youth Protection

- ☐ The district has adopted the Statement of Conduct for Working with Youth.
- ☐ The district has adopted RI's zero-tolerance policy against abuse and harassment.
- ☐ The district has developed a procedure for contacting the student's parents or legal guardians as well as the involved district and club once an allegation is brought forth.
- ☐ The district has established reporting procedures, ensuring all volunteers understand their responsibility to report incidents to RI, and to ensure that only those who need to know are informed of the allegation in order to protect the privacy of both the victim and accused during the investigation.
- ☐ Any person involved in a Rotary youth program against whom an allegation of sexual abuse or harassment is made must be removed from all contact with youth until the matter is resolved.
- ☐ The district has identified appropriate support services for students who report abuse or harassment, including appointment of non-Rotary counselors for each student.

- ☐ Any allegation of abuse must be immediately reported to the appropriate law enforcement agency not affiliated with Rotary, in accordance with RI's zero-tolerance policy.
- ☐ A club must terminate the membership of any individual who admits to, is convicted of or is otherwise known to have engaged in sexual abuse or harassment of youth or youth program participants.
- ☐ A club may not grant membership to a person who is known to have engaged in sexual abuse or harassment.
- ☐ A Rotary member or non-Rotary volunteer who admits to, is convicted of, or is otherwise known to have engaged in sexual abuse or harassment or other act of moral turpitude must be prohibited from working with youth in a Rotary context.
- ☐ Districts will maintain confidential records of prohibited individuals and ensure such prohibitions are implemented consistently throughout the district from year-to-year.
- ☐ If a district investigation into a claim of sexual abuse or harassment is inconclusive, then, for the safety of youth participants and the protection of the accused, additional safeguards must be put in place to assure the protection of any youth with whom the individual may have future contact. If there are subsequent claims of sexual abuse or harassment, the adult shall be permanently prohibited from working with youth in a Rotary context. A person who is accused but later cleared of charges, may apply to be reinstated to participate in youth programs. Reinstatement is not a right, and no guarantee is made that he or she will be reinstated to his or her former position.
- ☐ The district will conduct an independent and thorough investigation into any claims of sexual abuse or harassment to determine how to prevent a similar situation in the future.
- ☐ The district must develop a crisis management plan that meets RI Board [safety guidelines](#). A crisis management plan must be finalized before any in-person exchanges can take place.
- ☐ Outbound students of a district that loses its certification status may complete their exchange with the permission of their natural parents or legal guardians, and their respective host districts.

Program-specific Requirements

Even if your district is not currently active in each program listed below, your district must comply with the following should it participate in this program in the future.

Long-term Exchange Program

- ☐ Exchanges should be for one academic year but may be extended to include part or all of the holiday periods immediately preceding and immediately following the academic year.
- ☐ The sending club selects an individual Rotary counselor to be in regular contact with the outbound student and to serve as a liaison between the student and the club, the student's parents or guardians, and community at large. The club counselor must not be in a position of authority over the student's exchange, such as a district or club Youth Exchange officer. The club counselor must be trained in responding to any problems or concerns which may arise during the exchange, including the prevention of physical, sexual, and psychological abuse.
- ☐ The sending club or district requires, at a minimum, quarterly reports from outbound students. This report should include information on their current hosts, feelings, concerns, ideas, and suggestions regarding their exchange experience thus far. The designated Youth Exchange officer reviews the reports carefully and, when necessary, takes actions to respond to any irregularities report by the students.

Short-term Exchange Program

- ☐ Exchanges vary from several days to several weeks or months. They often take place when school is not in session and usually do not include an academic program; some feature a homestay, camp, or tour component.
- ☐ The sending club selects an individual Rotary counselor to be in regular contact with the outbound student and to serve as a liaison between the student and the club, the student's parents or guardians, and community at large. The club counselor must not be in a position of authority over the student's exchange, such as a district or club Youth Exchange officer. The club counselor must be trained in responding to any problems or concerns which may arise during the exchange, including the prevention of physical, sexual, and psychological abuse.

Virtual Exchange Program

- ☐ Virtual exchanges are an alternative to in-person exchanges when travel is not possible.
- ☐ Districts must be aware of local laws related to data privacy and internet use involving minors, and provide volunteers and program participants with electronic and online safety training.
- ☐ Outbound-only districts interested in "hosting" virtual exchange students must submit an additional youth [protection attestation form](#) to RI.

Student Application

- ☐ Candidates must submit a written application and must undergo a selection process including personal interviews with the applicant and the applicant's parents or legal guardians at the club level and at the district level.

Student Selection and Placement

- ☐ The sending district ensures that each student is accepted and hosted by a club in a partner district that has been certified by Rotary International to participate in the Youth Exchange program.
- ☐ All individuals involved in the exchange, including students and their parents or legal guardians and Rotary counselors, agree in writing to all the requirements of the program as determined by the sending and host clubs or districts.
- ☐ Student travel itineraries are agreed upon by the students' parents or legal guardians and the host club or district.

Student Orientation & Debriefing

- ☐ The sending club or district organizes a mandatory orientation for students and their parents or legal guardians prior to departure.
- ☐ At outbound orientation participants are informed about the rules, procedures and expectations associated with the Youth Exchange program and includes a briefing about the local Rotary and Rotaract clubs and their activities.
- ☐ The sending club or district provides abuse prevention and awareness training for both students and parents or legal guardians.
- ☐ Due to the likely effects of reverse culture shock, following their return, students and their parents or legal guardians are encouraged to attend a debriefing meeting for the purpose of assisting them to transition to their home, school, and community environment.

Student Preparation

- ☐ The sending club or district provides students with a list of individuals to contact in the case of a problem or emergency. This list must include the name and contact information for the student's:
 - Sending club counselor
 - Sending club president
 - Sending district chair
 - Sending district governor

Student Travel Insurance

- ☐ Evidence of student travel insurance coverage shall be submitted to, received by, and accepted by the host district prior to the student's departure from home. As the host Rotary district must be in a position to arrange immediate and emergency medical attention when it is needed, the host district must approve that the insurance coverage carried by the student is with a responsible insurance company and will ensure that any service providers receive complete and prompt payment. The parent or legal guardian of the Youth Exchange student is responsible for the payment of all medical and accident costs.
- ☐ Partner districts shall determine where there may be gaps in coverage, in any national insurance plans or travel insurance coverage, and identify and purchase supplemental coverage to meet the minimums.
- ☐ The parent or legal guardian of each student shall obtain travel insurance, including, but not limited to, medical and dental coverage for accidental injury and illness, repatriation of remains, emergency evacuation, 24-hour emergency assistance services, and personal legal liability. Such amounts shall not be less than the minimum limits and benefits per student designated in the RCOP.
- ☐ Parents or legal guardians may also consider obtaining additional travel insurance coverage options designated in the RCOP.
- ☐ Where it is a statutory or legal requirement for travel insurance to be purchased in the host country, such insurance shall be in accordance with these limits and benefits. In all other cases dual insurance should be avoided unless agreed to by all parties.
- ☐ Clubs and districts are strongly encouraged to consult insurance counsel for advice on obtaining liability insurance and other coverage and should be fully informed about government's policies and regulations regarding foreign students, including insurance coverage requirements.
- ☐ Participation in extreme sports, such as hang gliding, rock climbing, and bungee jumping, is discouraged. If students are allowed to participate in extreme sports, these activities should be undertaken with the host districts' and parent or legal guardian's written permission, and additional adequate insurance should be obtained.

Early Returns

- ☐ Any participant who does not comply with the requirements of the program is removed from participation in the program.
- ☐ The host and sending clubs and districts, host families and the student's parents or legal guardians, are fully informed prior to the student being sent home. Such

decision requires the agreement of the host and sending districts. The student should be returned home at the earliest practical time by a route agreed upon between the parents or legal guardians and the sending district. In the event of an impasse, districts may appoint an independent Rotary member to serve as a mediator.

Reporting to Rotary International

- ☐ District submits annual survey to RI.
- ☐ All incidents, including but not limited to, accidents, death, early returns, and crimes, and any allegations of abuse or harassment will be reported by the district to RI within 72 hours of the time a district officer learns of the incident. The district has identified a person within the district who will be responsible for reporting to RI.
- ☐ Where there is sufficient evidence that an individual, club or district knowingly failed to report an incident as required, the general secretary may determine whether and/or the extent to which involved parties may continue to be eligible to participate in Rotary's youth programs, or whether additional sanctions may be necessary, including but not limited to requiring the club to terminate an individual's membership.

Records & Documents

- ☐ The district has a retention policy for student and volunteer applications and materials related to Youth Exchange.
- ☐ The district complies with Rotary International's procedures for use of Rotary Marks as detailed in the most recent Manual of Procedure in district Youth Exchange promotional materials, including any email addresses and/or websites.

Volunteer Selection and Screening

- ☐ All adults (Rotary and non-Rotary members) involved in the program, including but not limited to committee members, sending club counselors, and others, must be interviewed to determine suitability to work with youth, complete and sign a youth volunteer form, and agree to undergo a reference check. Reference checks should entail asking three people about the individual's suitability to work with exchange students. These three people should not be family members and no more than one of the references should be a Rotary member.
- ☐ Any participant who does not comply with the requirements of the program will be removed from participation in the program. In the case of adult volunteers (both Rotary and non-Rotary members), those who have not complied with program requirements will be permanently removed from involvement with youth in a Rotary context.

Volunteer Training

- ☐ The district Youth Exchange policy outlines the content and frequency of training, participants who must receive training, who has the responsibility for arranging and conducting training, and how records of participation are maintained.
- ☐ All adults (Rotary and non-Rotary members) involved in the program, including but not limited to committee members, sending club counselors, and others, receive training that includes information on program administration and rules, and abuse and harassment awareness and prevention.

Program Evaluation

- ☐ All certified districts are subject to an in-person and/or virtual program evaluation.

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 8 – Reference Resources

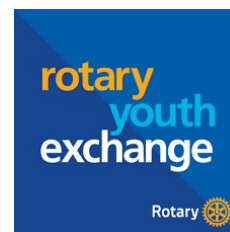
Resources Table

All documents are stored on rotaryoceania.zone

see Documents/Youth Programmes

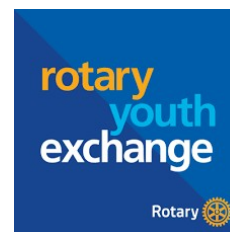
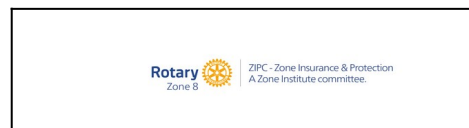
Reference document name	Filename	Importance/Relevance
RI Youth Exchange Handbook	746_youth_exchange_handbook_en.pdf	Key document developed by RI as the authoritative guide for RYE
Youth Travel Excerpts Reference from Code of Policies	youth_travel_excerpts_reference_code_of_policies_en.pdf	Key document developed by RI as the authoritative rules governing youth travel
2023-4 RYE Certification Requirements	2023-24_RYE_Certification_Requirements_EN.pdf	Key document developed by RI setting out certification requirements that must be certified by DGE
RI-EXCHANGE STUDENT Guide	RI-EXCHANGE-STUDENT-Guide.pdf	Key document developed by RI as the authoritative guide for RYE Students
Rotary Youth Exchange Safety guidelines 2020-21	Rotary_Youth_Exchange_safety_guidelines_2020-21_EN.pdf	Key document developed by RI as the authoritative safety guide for RYE
Youth Exchange DEI – Supporting LGBTQ exchange students	youth-exchange-dei-supporting-lgbtq-exchange-students-en.pdf	Key document developed by RI as the authoritative guide for DEI
RI Youth Protection Guide 2019	RI Youth Protection Guide 2019.pdf	Key document developed by RI as the authoritative guide for protection of youth
The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021	The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021.pdf – NEW ZEALAND LAW	Rotary assumes the obligations as an EPO (Exchange Programme Organisation) to provide home hosting – see https://www.education.govt.nz/school/student-support/secondary-school-exchanges/exchange-programme-organisations-epos/#List

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
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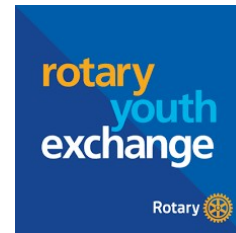
Reference document name	Filename	Importance/Relevance
Office of the Privacy Commissioner - Health Information Privacy Code 2020	Office of the Privacy Commissioner _ Health Information Privacy Code 2020.pdf NEW ZEALAND LAW	Health Privacy Code – New Zealand law
Privacy Commissioner Example FAQ AskUs – Article: How do I respond to a request for a child's information from a non-custodial parent responding to a request for info about a child?	AskUs _ Article _ How do I respond to a request for a child's information from a non-custodial parent __ responding to a request for info about a child.pdf	Information example on privacy from NZ Privacy Commissioners FAQs on website
Privacy Commissioner Example FAQ AskUs _ Article: Can I disclose information a child has provided during counselling to their parent disclose information a child has provided during counselling?	AskUs _ Article _ Can I disclose information a child has provided during counselling to their parent __ disclose information a child has provided during counselling.pdf	Information example on privacy from NZ Privacy Commissioners FAQs on website
European GDPR Compliance for under the Uniform Exchange Agreement received from the European Rotary District partner.	2023-2024_EU_GDPR_Compliance_C ommitment - New Zealand.pdf	Compliance Commitment required by European Rotary RYE programmes
Section 29 (1) and (20 of the Care of Children Act 0224	Care of Children Act 2004.pdf	New Zealand law relating to appointing additional guardians if required
Sections 86 and 87 of the 2017 Contracts and Commercial Act NZ.png	Sections 86 and 87 of the 2017 Contracts and Commercial Act NZ.png	New Zealand law relating to enforceability of contracts in New Zealand against minors and requirements to prove “fair and reasonable”.
International Student Contract Dispute Resolution Scheme Rules 2016	International Student Contract Dispute Resolution Scheme Rules 2016.pdf	In the event of a dispute with an youth programme student from overseas this dispute resolution scheme may need to be followed.
Rotary Youth Exchange in Oceania	youthexchange.org.nz	This site contains the policies and forms available for download set out in this document
Ministry of Education Advice to students and parents on an	None – see web page	https://parents.education.govt.nz/

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
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Reference document name	Filename	Importance/Relevance
international exchange		secondary-school/

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
Project Start Date	13 November 2024
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APPENDIX 9 – The MOUs

Memorandums of Understanding and other legal documents

- (a) District, Club, ROZ Youth Programmes Limited – RYE Long Term Exchange Agreement MOU
- (b) Inbound RYE Student – School Confirmation
- (c) RYE HOST PARENTS AGREEMENT – S76 The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021

<p>Youth Programme Management AGREEMENT</p> <p>Youth Programme Manager and Organiser</p> <p>ROZ Youth Programmes Limited, a wholly owned subsidiary of ROZops Ltd a duly incorporated charity having its registered office at Auckland, NEW ZEALAND</p> <p>("ROZyouth")</p> <p><i>(write in name of the Youth Programme and Organiser above - Club or companies are preferred. Trusts will need Trust Deed that permits trading)</i></p> <p>the "Youth Programme Organiser"</p> <p>Guidance on Use of this template agreement form This MOU has been prepared record the roles and obligations of ROZyouth, Districts and Clubs.</p> <ul style="list-style-type: none"> • Rotary Oceania (the trading name for ROZops Limited) holds master policies for insurance for Rotary in Oceania. This enables Rotary Oceania to issue insurance cover certificates for standard programmes and organise extensions for programmes that have special risks. • Special risks include risks that require integration with other forms of insurance such as cover for individual students or extra covers required by venues. • The insurance master policies are issued to ROZops Limited. ROZ Youth Programmes Limited is a wholly owned subsidiary of ROZops Limited. • ROZyouth is the contracting party for youth programmes. ROZyouth and acts as a compliance and risk manager for youth programme projects and additionally provides record keeping and communication systems that provide the back-office infrastructure required to support the Rotary International policies, guides and plans relating to youth programmes and the volunteers and participating youth. For specific reference to its role with RI, District, Clubs and youth programmes please see the Rotary Oceania Youth programmes Protection and Crisis Management Guide. • You are encouraged to use this form as preliminary checklist as it will assist you working with your District Insurance Officer (DIO) to work out whether Youth Programme Insurance is required. • Some quick guides: <ul style="list-style-type: none"> ◦ Usually ROZyouth delegates management and control of the Youth Programme to the organising Club, District or other Rotary entity ◦ ROZyouth can help with Youth Programmes that require national marketing, ticketing processes through an agreed schedule of "Youth Programme Project Management Services" if the ROZyouth Programme Co-ordinators want assistance, this agreement is used to record those services and who pays for what. ◦ Youth Programmes that have special risks, such as Youth Programmes that require traffic management, crowd management, use of private property or use of motor vehicles or plant and 	<p>rotary youth exchange</p> <p>The Districts of Zone 8 Oceania Rotary Youth Exchange in Oceania</p> <p>Offer of Place at School – Domestic Student</p> <p>Student Name : _____</p> <p>DOB: _____</p> <p>Address in home country : _____</p> <p>City in home country: _____</p> <p>Home Country : _____</p> <p>This student has been offered a place at this institution in a course of study which meets foreign student policy requirements. An assessment of the student has been undertaken to ensure that they are able to participate effectively in the course, and the course offered meets this student's proficiencies and career intentions.</p> <p>.....[Insert name of College]</p> <p>Length of Course:</p> <p>Date course starts:</p> <p>Fee Details: N/A Rotary International Youth Exchange (Tuition or activities outside of the normal school curriculum might incur subject fees) and Provision of accommodation compliant with the The Education (Pastoral Care of International Students) Code of Practice 2021 will be provided by Rotary's programme manager, ROZ YOUTH PROGRAMMES LIMITED (R702306) referred to as Rotary New Zealand</p> <p>School Officer[Name]</p> <p>Title / Position[Principal, International Dean, etc]</p> <p>Signature</p> <p>Date: _____</p> <p>(Student: Attach this form to your application for student visa)</p> <p>Immigration New Zealand policy reference: U1.35.10 Exchange students</p> <p>ROZ Youth Programmes Limited - Offer of Place at School MOU.docx 1 of 1</p>	<p>Youth Programme Management AGREEMENT with a Rotary Youth Exchange Residential Caregiver (host) TO PROVIDE HOSTING for an inbound RYE Student coming to New Zealand</p> <p>Youth Programme Manager and RYE Inbound Residential Caregiver Agreement</p> <p>ROZ Youth Programmes Limited, a wholly owned subsidiary of ROZops Ltd having its registered office at Auckland, NEW ZEALAND and acts as the multi-district organisation for Rotary Youth Exchange in Oceania ("ROZyouth")</p> <p>the "RYE Inbound Residential Caregiver"</p> <p>This is the formal acceptance for an RYE Inbound Residential Caregiver.</p> <p>RYE Inbound Residential Caregivers 'host' inbound Rotary Youth Exchange Students in New Zealand.</p> <p>RYE Inbound Residential Caregivers provide accommodation and care services under The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021 and the other guides and materials provided to you by Rotary.</p> <p>All that remains is for you to confirm your offer to ROZyouth to host by signing and returning this offer.</p> <table border="1"> <thead> <tr> <th colspan="4">Offer of Exchange and Inbound Student Acceptance</th> </tr> <tr> <th></th> <th>Signature</th> <th>Title</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>For ROZyouth</td> <td></td> <td>Chair</td> <td></td> </tr> <tr> <td>RYE Inbound Residential Caregiver</td> <td></td> <td>[write in title above]</td> <td></td> </tr> </tbody> </table>	Offer of Exchange and Inbound Student Acceptance					Signature	Title	Date	For ROZyouth		Chair		RYE Inbound Residential Caregiver		[write in title above]	
Offer of Exchange and Inbound Student Acceptance																		
	Signature	Title	Date															
For ROZyouth		Chair																
RYE Inbound Residential Caregiver		[write in title above]																

Youth Programme Management AGREEMENT



ROZops Limited - Zone 8 Rotary Operations
in Oceania

Youth Programme Manager and Organiser

ROZ Youth Programmes Limited, a wholly owned subsidiary of ROZops Ltd a duly incorporated charity having its registered office at Auckland, NEW ZEALAND

(“ROZyouth”)

[write in name of the Youth Programme and Organiser above– Club or companies are preferred. Trusts will need Trust Deed that permits trading]

the “Youth Programme Organiser”)

Guidance on Use of this template agreement form

This MOU has been prepared record the roles and obligations of ROZyouth, Districts and Clubs.

- Rotary Oceania (the trading name for ROZops Limited) holds master policies for insurance for Rotary in Oceania. This enables Rotary Oceania to issue insurance cover certificates for standard programmes and organise extensions for programmes that have special risks.
- Special risks include risks that require integration with other forms of insurance such as cover for individual students or extra covers required by venues.
- The insurance master policies are issued to ROZops Limited. ROZ Youth Programmes Limited is a wholly owned subsidiary of ROZops Limited.
- ROZyouth is the contracting party for youth programmes. ROZyouth acts as a compliance and risk manager for youth programme projects and additionally provides record keeping and communication systems that provide the back-office infrastructure required to support the Rotary International policies, guides and plans relating to youth programmes and the volunteers and participating youth. For specific reference to its role with RI, District, Clubs and youth programmes please see the Rotary Oceania Youth programmes Protection and Crisis Management Guide.
- You are encouraged to use this form as preliminary checklist as it will assist you working with your District Insurance Officer (**DIO**) to work out whether Youth Programme Insurance is required.
- Some quick guides:
 - Usually ROZyouth delegates management and control of the Youth Programme to the organising Club, District or other Rotary entity
 - ROZyouth can help with Youth Programmes that require national marketing, ticketing processes through an agreed schedule of “Youth Programme Project Management Services” If the ROZyouth Programme Co-ordinator wants that assistance, this agreement is used to record those services and who pays for what.
 - Youth Programmes that have special risks, such as Youth Programmes that require traffic management, crowd management, use of private property or use of motor vehicles or plant and

equipment are never covered by 'general' liability or standard Youth Programme insurance. Your DILLO is there to help you through with risk management and insurance.

- A claim under the District or Club liability covers generates a risk to the entire "pool" of the entities with cover under the Master Policies.
- Finally, the pride and satisfaction of being involved with Rotary through its Clubs programmes as a member of one of those programmes or as a volunteer, relies on the collective good reputation of all. This MOU is designed to ensure co-ordination between all the many actors, officers of Zone, District, Clubs and volunteers delivers on that promise of good standing and reputation for all involved.

Youth Programme Details (to be completed for each programme and entered as a ROZyouth project)																				
Youth Programme Name																				
Youth Programme Description																				
Youth Programme Type <i>[choose type from list in Appendix 1 – write in type or if NEW note as NEW]</i>																				
Term of agreement for short term events: Note:if there is a project plan or TASK list in Flectra please attach	For the term set out below the key dates for the Youth Programme: <table border="1"> <thead> <tr> <th>Task</th> <th>Date dd/mm/yyyy</th> <th>Time Note insurance covers commences at pm</th> </tr> </thead> <tbody> <tr> <td>Start</td> <td><u> </u>/<u> </u>/<u> </u></td> <td>16:00:00</td> </tr> <tr> <td>Open to Public</td> <td><u> </u>/<u> </u>/<u> </u></td> <td>00:00:00</td> </tr> <tr> <td>Close to Public</td> <td><u> </u>/<u> </u>/<u> </u></td> <td>00:00:00</td> </tr> <tr> <td>Packdown</td> <td><u> </u>/<u> </u>/<u> </u></td> <td>00:00:00</td> </tr> <tr> <td>End of Youth Programme</td> <td><u> </u>/<u> </u>/<u> </u></td> <td>00:00:00</td> </tr> </tbody> </table>		Task	Date dd/mm/yyyy	Time Note insurance covers commences at pm	Start	<u> </u> / <u> </u> / <u> </u>	16:00:00	Open to Public	<u> </u> / <u> </u> / <u> </u>	00:00:00	Close to Public	<u> </u> / <u> </u> / <u> </u>	00:00:00	Packdown	<u> </u> / <u> </u> / <u> </u>	00:00:00	End of Youth Programme	<u> </u> / <u> </u> / <u> </u>	00:00:00
Task	Date dd/mm/yyyy	Time Note insurance covers commences at pm																		
Start	<u> </u> / <u> </u> / <u> </u>	16:00:00																		
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Packdown	<u> </u> / <u> </u> / <u> </u>	00:00:00																		
End of Youth Programme	<u> </u> / <u> </u> / <u> </u>	00:00:00																		
Youth Programme location																				
Youth Programme IP releases	Images and logo's of ROZyouth Programme Co-ordinator to add to social media sites (such as Facebook), other websites associated with ROZyouth Programme Co-ordinator in accordance with Youth Programme Organiser's Guidelines																			
ROZyouth Programme fee (includes insurance)																				
ROZyouth Deliverables	1 generally as set out in the next section titled "Youth Programme Project Management Services" 2 specifically: <ul style="list-style-type: none"> the services allocated to ROZyouth on any project plan the services agreed in Co-Chaired Youth Programme Project Control Group Meetings as documented in the minutes 																			

Youth Programme Details

(to be completed for each programme and entered as a ROZyouth project)

ROZyouth and ROZyouth
Programme Co-ordinator
Commitments on
Promotion of Youth
Programme Organiser

- 1 **Mutual Acknowledgement of ROZyouth Programme Co-ordinator**– Each party is to:
 - Credit the other by acknowledging the ROZyouth Programme Co-ordinator in all press releases and communications (including posters).
 - Supply representative artwork to the other and license such artwork to the other to use during the term of this agreement.
 - On termination each party may remove the reference to the other and each may in addition require the other to remove its logo or photographic representations from all material that can be amended such as on websites. Any items that are of a permanent nature or subject to run out +-+1' (such as merchandise) shall be agreed by the Co-Chaired Youth Programme Project Control Group as a post-termination activities agreement.
- 2 **ROZyouth Youth Programme Co-ordinators Role**
At each Youth Programme ROZyouth shall ensure that ROZyouth Programme Co-ordinator is the lead for the Youth Programme and if the Youth Programme has co-organisers in the order and manner set out in the Project schedule and the Rotary Oceania Crisis Management Plan
- 3 **IP Rights**
Images or other artistic works featuring the Youth Programme shall be vested in ROZyouth and the ROZyouth Programme Co-ordinator solely for the purpose of promoting the Youth Programme both before and after the Youth Programme. Youth Programme Organiser's images that do not feature the Youth Programme which may be provided to ROZyouth for use to promote ROZyouth Programme Co-ordinator may only be used for that purpose and shall be used in accordance with the restrictions on use as provided for by ROZyouth Programme Co-ordinator and always remain vested in ROZyouth Programme Co-ordinator or the owner of the work.
- 4 **Trade Stands** – trade exhibitors must be subcontracted on an Exhibitor Agreement. If the agreement form proposed to be used by the ROZyouth Programme Co-ordinator is a form provided by ROZyouth the ROZyouth Programme Co-ordinator may proceed to contract the Trade Exhibitor once an insurance declaration or extension of the Youth Programme Cover policy to cover Trade Exhibitors is confirmed by endorsement on the Youth Programme Cover policy. Failure to observe this requirement will void the Youth Programme Organisers insurance.
- 5 **Live Music Youth Programmes**
Live music Youth Programmes have special risks. Cover is excluded but may be available as an extension to the Youth Programme Cover on application
- 6 **Trading Trusts**
Trading trusts generally do not have any protection at law by way of limiting liability to the capital of the trust and accordingly the risk to individuals as Trustees can only be covered by specific Trustees Liability Insurance. Application for Youth Programme Cover for a trading trust must be made as a separate proposal.
- 7 **Fun Runs and Challenges**
Fun Runs and challenges will require submission of the agreement to be used by the ROZyouth Programme Co-ordinator to use or occupy public spaces..

Youth Programme Details

(to be completed for each programme and entered as a ROZyouth project)

The ROZyouth Programme Co-ordinator may satisfy this requirement by confirming that the ROZyouth Programme Co-ordinator has adopted the template “Advice to Public Authorities” as provided by ROZyouth and ensured that document has been provided to any public authority involved. Particular attention is required if traffic management is involved.

8 Youth Programmes Involving Service to other events

Again these Youth Programmes involve special risks. Cover is excluded but may be available as an extension to the Youth Programme Cover on application

Youth Programme Project Management Services	
ROZyouth Management Services	<p>Project planning – ROZyouth will review any project plan for the Youth Programme Organiser. If the Youth Programme has a formal project plan all delivery of the plan will be the business of the Co-Chaired Youth Programme PCG (Project Management Group) and ROZyouth services shall be costed and scheduled as part of this agreement.</p> <p>Project financials – As the Insured under the Youth Programme Insurance ROZyouth is required oversee the budgeting, transactions and accounting with the Youth Programme Organiser. If the ticketing is to be managed by ROZyouth all accounting shall be done by ROZyouth. If the ROZyouth Programme Co-ordinatoris carry out all the financial transactions then the accounting shall be via the ROZops ProjectOne system or such other system as agreed with ROZyouth.</p> <p>Marketing Delivery – In conjunction with Youth Programme Organiser's marketing team, ROZyouth will market the opportunity to all Rotary Entities:</p> <ul style="list-style-type: none"> • through direct contact wherever possible through its Project One server • through the Rotary Zone and District Websites on Project One • at key Rotary Youth Programmes hosted within the ProjectOne server. <p>ROZops Supporter Participation at Youth Programmes – ROZyouth will coordinate with its National supporters to ensure the National supporter are informed of relevant Youth Programmes as an opportunity to be represented if desired.</p> <p>Promotion and Advertising – For all entities that opt-in, to use the Project One server ROZyouth will ensure ROZyouth Programme Co-ordinatoris promoted on all participating websites and social media channels in use (eg Facebook) as agreed with the Youth Programme Organiser's Marketing team and costed and provided for in a project plan.</p> <p>Project contracting – ROZyouth may engage and contract for the Youth Programme Organiser. If ROZyouth acts as the contracting party all contracts are to be provided to the Co-Chaired Youth Programme PCG with a checklist for common issues especially indemnities or cancellation and refunds policies on cancellation. Risk management for perils such as natural disasters, fire, flood for facilities should result in full refunds and the facility owner should have cover for Business Interruption to ensure repayment.</p> <p>Project compliance – ROZyouth will provide review services to the ROZyouth Programme Co-ordinator on the any specific Youth Programme Health Safety and Risk Management Plan and how that integrates with the RI/Rotary Oceania Crisis Management Plan.</p> <p>Youth Programme Staging – ROZyouth is not a staging company but may provide advice on issues of engagement of technical consultants for services such as video streaming, production of live shows.</p>

Youth Programme Project Management Services	
	<p>Youth Programme Deferrals/Cancellations – ROZyouth services are for the Youth Programme as planned in the Project Plan.</p> <p>If the Youth Programme has to be postponed or re-scheduled, for any reason, the Co-Chaired Youth Programme PCG will, as part of consideration of the postponement, set out the basis for ROZyouth to continue to provide services.</p>
Risk Management	<p>Insurance</p> <ul style="list-style-type: none"> • Insurance – ROZyouth, through the master policies organised by its parent company ROZops Limited that cover Clubs, Districts Trust and other Rotary entities, will ensure that the Youth Programme Organisers are named parties under the relevant policies and will assist the ROZyouth Programme Co-ordinator to satisfy the requirements in the next paragraph on the other required liability covers • Other required liability covers - The ROZyouth Programme Co-ordinator will ensure that as a contracting entity it is: <ol style="list-style-type: none"> 1. an insured party under the ROZops Multinational General or Public Liability Policy AND for broad form liability covers: 2. and as incorporated entity <ul style="list-style-type: none"> ◦ if a Club, then as an insured under an Associations Policy OR ◦ if a Company then under a broadform District and Officers Policy. <p>Trading Trusts as the ROZyouth Programme Co-ordinator - as noted above, trading trusts generally do not have any protection at law by way of limiting liability to the capital of the trust and accordingly the risk to individuals as Trustees can only be covered by specific Trustees Liability Insurance. Accordingly any trading trust that wishes to be the ROZyouth Programme Co-ordinator will need to submit with this agreement a Trust Deed and a certificate of currency for a Trustees Liability policy that is has been reviewed and approved by ROZyouth .</p> <p>Contract Risk – as ROZyouth will act as the contracting party for the Youth Programme Organiser. ROZyouth will, as part of its professional services:</p> <ul style="list-style-type: none"> • ensure that all contracts with youth are risk managed to the best outcome possible for the Youth Programme and/or • ensure that all contracts for sponsors and supporters are similarly managed. <p>Contract risk will be covered as a standing item by ROZyouth to the Co-Chaired Youth Programmes Project Steering Group.</p> <p>Any decision of the Co-Chaired Youth Programmes Project Steering Group on any contract issues shall be binding on both parties.</p>
Electronic Card Transactions	<p>ROZyouth will offer its range of card and bank to bank payments for tickets solutions to meet the requirements of each Youth Programme and will remunerated separately for card transaction and bank to bank payments for tickets costs as a project disbursement.</p>
Other Financial Services	<p>ROZyouth may market and offer additional financial services to the Rotary ROZyouth Programme Co-ordinator including.</p> <ul style="list-style-type: none"> • creation of charitable donation 'Products' so that guests can donate on-line for a specific charitable programme during registration for the Youth Programme

Youth Programme Project Management Services			
	Any remuneration, if any, for such services in outside this contract and if supplied without any agreement will be provided at no cost.		
Working Capital	<p>The ROZyouth Programme Co-ordinator will provide working capital to pay any required setup costs in advance of revenue received from ticket purchases or other programme setup costs.</p> <p>These services are provided on a limited recourse basis. On completion of the Youth Programme if the Youth Programme programme is in profit the amount paid for the services shall be refunded in part or in whole to each of the Youth Programme Organisers in accordance with their relative contributions.</p> <p>For any services provided in support of activities deemed to be in line with the RI Eligible Expenses framework, if there is any question in relation to these services under any RI District or other Budget, then the invoice may be reversed and the amount treated as a limited recourse loan to ROZyouth.</p>		
Youth Programme Organiser's contracting forms	Form	ROZyouth Programme template Tick if used	Other [name & attach]
	RYE Student Application form	<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
	Other		
Dispute Resolution	<p>Dispute resolution outside the Youth Programme PCG shall be by reference to mediation by any party with a mediator from the ROZops mediator panel. Mediators are Past District Governors and are from time-to-time appointed by the ROZops Board to that position. The Chair of the Mediator Group shall be appointed by those Past District Governors on the list and shall select the mediator on any reference by any party to this contract. The costs and procedures of the mediator shall be determined by the List of mediators or in the absence of any costs and procedures agreement, then in accordance with the rules of the Resolution Institute or a similar organisation in New Zealand.</p> <p>If mediation fails the parties may refer any dispute to arbitration.</p> <p>All disputes must be conducted in a manner ensure the good reputation of Rotary and its Rotarians remains a key to both resolution and preservation of public image.</p>		

Sign-off			
	Signature	Title	Date
For ROZyouth		Chair	
For Youth Programme Organiser		[write in title above]	
For Youth Programme Organiser [enter if joint venture partners]		[write in title above]	

Terms and Conditions

1 Confidentiality

Each party shall maintain as confidential at all times and shall not at any time, directly or indirectly:

- a Disclose or permit to be disclosed to any person; or
- a Use for itself; or
- b Use to the detriment of the party that discloses *Confidential Information* to the other, any *Confidential Information* (including correspondence, documents and representations relating to trading performance, site development and future plans) except:
 - i As required by law;
 - i As is already or becomes public knowledge otherwise than as a result of a breach by the *Recipient* of this agreement; or
 - ii As authorised in writing by the party that discloses *Confidential Information* to the other.

2 Good faith and non-circumvention

The *Parties* agree and acknowledge that the performance of this agreement and the provision of all *Confidential Information* to each other shall be in accordance with the principle of good faith.

Neither party will, directly or indirectly, do anything which will or might lead to the defeating the provisions or intent of this agreement.

3 Intellectual property rights

All intellectual and industrial rights (IP Rights) derived in any artistic work created solely for the

Youth Programme, whether arising prior to or in the course of this agreement, shall be jointly owned by the parties which each having unlimited several rights of use worldwide, in perpetuity and with the rights to create derivative works.

4 Return of materials

Any IP Rights materials that are designated by the parties during this agreement for limited or restricted use, which designation is to be made and agreed prior to use and are to be returned on expiration of this Agreement.

5 Dispute Issues Must Be Discussed

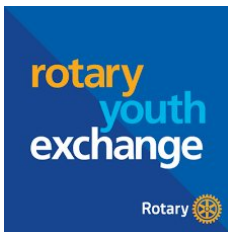
Any issues in dispute arising where the parties cannot themselves resolve by first meeting and discussing in good faith, may then, after mediation, be subject to the normal rights at law including seeking injunctive relief.

6 Survival of agreement

Any IP *Release rights* shall survive the termination of this agreement.

7 Governing Law and Jurisdiction

This agreement is governed by the law of New Zealand and is subject to the exclusive jurisdiction of the Courts of New Zealand.



Offer of Place at School – Domestic Student

Student Name :
DOB:
Address in home country :
City in home country:
Home Country :

This student has been offered a place at this institution in a course of study which meets foreign student policy requirements. An assessment of the student has been undertaken to ensure that they are able to participate effectively in the course, and the course offered meets this student's proficiencies and career intentions.

.....[Insert name of College]

Length of Course:

Date course starts:

Fee Details: N/A Rotary International Youth Exchange

(Tuition or activities outside of the normal school curriculum might incur subject fees) and

Provision of accommodation compliant with the The Education (Pastoral Care of International Students) Code of Practice 2021 will be provided by Rotary's programme manager, ROZ YOUTH PROGRAMMES LIMITED (8702306) referred to as Rotary New Zealand

School Officer[Name]

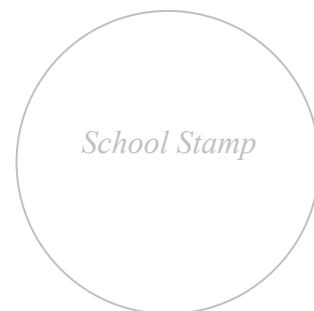
Title / Position[Principal, International Dean, etc]

Signature

Date:

(Student: Attach this form to your application for student visa)

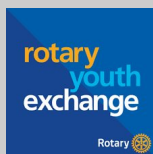
Immigration New Zealand policy reference: U3.35.10 Exchange students



**Youth Programme Management AGREEMENT
with a Rotary Youth Exchange Residential
Caregiver (host) TO PROVIDE HOSTING
for an Inbound RYE Student
coming to New Zealand**



ROZops Limited - Zone 8 Rotary Operations
in Oceania



**Youth Programme Manager
and
RYE Inbound Residential Caregiver Agreement**

ROZ Youth Programmes Limited, a wholly owned subsidiary of ROZops Ltd having its registered office at Auckland, NEW ZEALAND and acts as the multi-district organisation for Rotary Youth Exchange in Oceania

(“ROZyouth”)

the “RYE Inbound Residential Caregiver ”)

This is the formal acceptance for an RYE Inbound Residential Caregiver.

RYE Inbound Residential Caregivers ‘host’ inbound Rotary Youth Exchange Students in New Zealand .

RYE Inbound Residential Caregivers provide accommodation and care services under The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021 and the other guides and materials provided to you by Rotary.

All that remains is for you to confirm your offer to ROZyouth to host by signing and returning this offer.

Offer of Exchange and Inbound Student Acceptance


	Signature	Title	Date
For ROZyouth		Chair	
RYE Inbound Residential Caregiver		[write in title above]	


Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands) 17 Countries across 5 Districts
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 10 – Parents Wishes

Parental Guardians Statement of Their Wishes or Directions on an Emergency




 Rotary Youth Exchange in Oceania
The Districts of Zone 8 Oceania

Statement of Wishes or Directions

This Statement of Wishes or Directions is provided to the Rotary programme manager to be available as a guide if the wishes or directions are required to inform any party that requires direction from a guardian on an emergency.

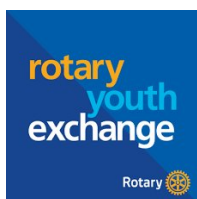
If any application is made for appointment of a temporary guardian(s) we acknowledge that any statement of wishes or directions given by us may be followed pending our being advised of use and our providing on such advice our providing a statement of instructions.

Our wishes/directions are:

Trigger or Event	Wishes or Direction
Any requirement for emergency medical treatment	Example : "The host country Crisis Management Team provide the best available qualified person to act as an adviser to work with the Emergency Management services including medical services to consult with these services and be able to inform the CMT and us, when we are able to be contacted, as to the process and decisions required"
Any requirement for emergency dental treatment	
Any requirement for emergency protection	
Any requirement for emergency transport	
Any requirement for emergency withdrawal from school	
Any requirement for a Court order in relation to a student under 18 years of age	

Applicant (print name)	Signature
Legal Guardian 1 (print name)	Signature
Legal Guardian 2 (print name)	Signature
Witnessed in the presence of Sponsor Club Representative (print name)	Signature

Dated this _____ Day of _____ Month, _____ Year.



Statement of Wishes or Directions

This Statement of Wishes or Directions is provided to the Rotary programme manager to be available as a guide if the wishes or directions are required to inform any party that requires direction from a guardian on an emergency.

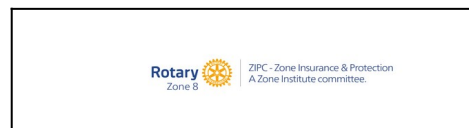
If any application is made for appointment of a temporary guardian(s) we acknowledge that any statement of wishes or directions given by us may be followed pending our being advised of use and our providing on such advice our providing a statement of instructions.

Our wishes/directions are:

Trigger or Event	Wishes or Direction
Any requirement for emergency medical treatment	Example : “The host country Crisis Management Team provide the best available qualified person to act as an adviser to work with the Emergency Management services including medical services to consult with those services and be able to inform the CMT and us, when we are able to be contacted, as to the process and decisions required”
Any requirement for emergency dental treatment	
Any requirement for emergency protection	
Any requirement for emergency transport	
Any requirement for emergency withdrawal from school	
Any requirement for a Court order in relation to a student under 18 years of age	

Applicant (print name)	Signature
/Legal Guardian 1 (print name)	Signature
Legal Guardian 2 (print name)	Signature
Witnessed in the presence of Sponsor Club Representative (print name)	Signature
Dated this _____ Day of _____ Month, _____ Year.	

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	91
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania District Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 11 – RI Crisis Management Plan

Rotary Zone 8 – Oceania Crisis Management Plan

for Districts 9910, 9920,9930, 9940 and 9999



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

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CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

1. PREAMBLE

This plan is based on the Rotary International template and the guide and the template can be downloaded from this URL:

<https://my.rotary.org/en/document/developing-crisis-management-plan>

2. PURPOSE

The health, safety and security of our volunteers and program participants is our highest priority. As such, this document has been developed to serve as an important procedural resource to assist the Rotary Districts within Rotary Zone 8 – Oceania volunteers and participants respond effectively when a crisis occurs in order to minimize risk and help ensure the safety of all, to the greatest extent possible.

3. PREPARATION AND CRISIS PREVENTION

3.1. Development

This crisis management plan includes a comprehensive assessment of the local risks, in collaboration with the following external agencies:

External Agency	Role	Assessment/comments
Walker Law	Legal Advice	Advisor on legal issues with RI policies
AON	Insurance Broker	Broker for Zone 8
New Zealand Police	Vetting and assistance on crime	Emergencies dial 111
New Zealand Ministry of Education	Education programme	
Bach Clinical Psychologist	Exploitation of children	
Sexual Harm	https://www.safetotalk.nz/	New Zealand Government Service with trained specialists 24/7

CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

Travel documents	Travel agency or Embassy or consulate	
NEMA - National <i>Emergency Management Agency</i>	is the <i>Government</i> lead for <i>emergency management</i>	0800 400 100.

3.2. Training Schedule

The district will implement the following training schedule for all individuals involved in the program:

Individuals by Class	Training	Record
District Governor train	All DGEs, DGNs and DGNNs shall attend or complete: 1. Youth protection modules at Zone Institute 2. RYE at RI Convention, if possible 3. the RI Learning Center courses on Youth Protection and Youth programmes	1. confirmation of attendance 2. confirmation if attended (not requirement) 3. certificates for all qualifying courses
Rotary Youth Exchange District Chairs	1. Youth protection modules at Zone Institute 2. RYE at RI Convention, if possible 3. the RI Learning Center courses on Youth Protection and Youth programmes	1. certificates for all qualifying courses 2. Police checks
Club Presidents and Club youth programme chairs if hosting or running a youth programme under a MOU with ROZ Youth Programmes	1. Youth protection modules at Oceania Learning and Development at SPEDS 2. RYE training run by RYE Chairs and District Learning and Development Officers 3. the RI Learning Center courses on Youth Protection	1. certificates for all qualifying courses 2. Police checks

CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

	and Youth programmes	
Rotary Youth Protection Officers	1 Youth protection modules at Oceania Learning and Development at SPEDS 2. RYE training run by RYE Chairs and District Learning and Development Officers 3. the RI Learning Center courses on Youth Protection and Youth programmes 4. Training run by the Zone Insurance and Protection Committee (ZIPC)	1. certificates for all qualifying courses 2. Police checks
Rotary Youth programme Counsellors	1.RYE training run by RYE Chairs and District Learning and Development Officers 2. the RI Learning Center courses on Youth Protection and Youth programmes	1. certificates for all qualifying courses 2. Police checks
Rotary Youth Programme project managers	Same as DG's	1. certificates for all qualifying courses 2. Police checks
Volunteers	1.RYE training run by RYE Chairs and District Learning and Development Officers 2. the RI Learning Center courses on Youth Protection and Youth programmes	1. certificates for all qualifying courses 2. Police checks
Hosting Parents or Guardians	RYE training run by RYE Chairs and District Learning and Development Officers	1. certificates for all qualifying courses 2. Police checks
Rotary Oceania Youth Programmes Co-ordinator	Same as DG's	1. certificates for all qualifying courses 2. Police checks
Document managers	ROZops ICT and Documents Officer	1. how to record and protect records relating to Youth



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for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

3.3. Planned and Unplanned Simulations

For the purpose of testing for readiness in the event of a crisis, the District Governor may initiate a planned or unplanned simulation of a crisis. The following guidelines will be followed during both a planned and unplanned simulation:

It will be clearly identified that the crisis is a simulation and there is no immediate risk to young people or volunteers.

A crisis simulation shall not be conducted during an active crisis or immediately following a resolved crisis.

A crisis simulation shall not be conducted during a scheduled conference, training event, planned group travel, or other event so as to avoid confusion.

The district governor will confirm when the crisis simulation has ended.

The Crisis Management Team will immediately conduct a debriefing session as outlined in the section below titled CRISIS RESOLUTION .

Note: A plan is only as good your ability to enact it successfully, therefore it is encouraged that the district governor or the Core CMT do at least one simulation per year, either planned or unplanned. Include other considerations for conducting simulations according to your local circumstances.

4. CRISIS MANAGEMENT TEAM

The Rotary Districts within Rotary Zone 8 - Oceania Crisis Management Team (**CMT**) will constitute the following members and include the outlined responsibilities. In the event of a vacancy, temporary leave of absence, or incapacitation of any member of the Core or Additional CMT, the district governor shall designate a trained replacement.

4.1. The Core Crisis Management Team:

District Governors: Responsible for overseeing all aspects of crisis response, convenes meetings, and delegates tasks as necessary. Represents the district and serves as the appointed spokesperson when answering media inquiries. Has ultimate decision-making authority when determining the level of a crisis (upon consultation with the CMT) and actions to take in response to a crisis according to the response protocols. A trained alternate should also be available in case the governor is impacted by the crisis or



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

otherwise unable to perform their crisis management duties.

District Youth Protection Officers: Assists with overseeing crisis response and serves as a consultant (when appropriate) or consults with local experts for guidance when necessary, monitors developments of the situation, and coordinates communication within the district and its clubs and with Rotary International. This person does not need to be an active member of a club to serve in this role.

District Youth Exchange Chairs: Serves as the main point-of-contact for students and families involved in Rotary Youth Exchange, coordinating communication with them. Responsible for ensuring all students are safe and accounted for in the event of a crisis. Responsible for reporting updates to all members of the CMT.

District Interact Chairs: Serves as the point-of-contact for youth and families involved in Interact, coordinating communication with them. Responsible for ensuring all students are safe and accounted for in the event of a crisis. Responsible for reporting updates to all members of the CMT.

District RYLA Chairs: Serves as the point-of-contact for youth and families involved in Rotary Youth Leadership Awards, coordinating communication with them. Responsible for ensuring all students are safe and accounted for in the event of a crisis. Responsible for reporting updates to all members of the CMT.

District Insurance Officers: Serves as the point of contact with the broker of record and insurer(s) in relation to risk management within the terms of the various covers. The District Insurance Officers for Oceania, as a subcommittee of the Zone Insurance and Protection Committee (which is established under the rules for governance of Zone 8 Institute¹) are responsible for organisation, placing and managing the various insurance policies required, especially those relating to youth programmes.

1 From the Zone 8 Institute Rules "The President of RI each year appoints a convener for the Institute who is usually the Director. The convener has full responsibility for the conduct and style of the Institute. He/She has total authority to determine the program. To assist the convener and to provide local expertise an Institute planning committee is recommended to the convener. The task of the planning committee is to act under the direction and supervision of the convener to make all necessary arrangements for the agenda and program." Note: the role of the Institute and its Committees as a transitioning organisation with Regionalisation may require update to this Crisis Management Plan when those transitions come into effect.



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

Additional Crisis Management Team: ²

1. Coordinators of Outbounds for Oceania exchange students

The RYE Outbound Co-ordinator's duties are:

(a) duties are:

- to work with the ROZ Youth Programmes Co-ordinator responsible for record keeping, communication systems and compliance*
- reception planning*
- selection process support through provision of systems*
- assisting the RYE teams in providing guidance of the intended outbound exchange students, family members and clubs indicated during the entire period of preparation that precedes their exchange.*

(b) coordinate the communications in the selection process of the youth exchange program in the Districts and Clubs:

(c) ensuring correct record keeping including written input. Applications forms, group dynamics and interviews with the youth and their families.

(d) guide and provide access to the TASKING system to provide ongoing monitoring of compliance by the Exchange Officers.

(e) conduct, together with the Chairperson of the Youth Committee, Chairperson of the Youth Protection Committee, and the Chairperson, the certification of clubs to participate in youth exchange programs.

(f) Regularly monitor any emergency notifications made through the the TASKING system and report potential or actual emergencies to the main CMT (crisis management team)

2. Coordinators of Inbounds for Oceania exchange students:

The RYE District Inbound Co-ordinator's duties are:

(a) duties are:

- to work with the ROZ Youth Programmes Co-ordinator responsible for record keeping, communication systems and compliance*

² This section has been informed by the Crisis Management plan from Brazilian District 4730 that was shared with the 9930 RYE Chair.



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

- *to participate in the reception, reception and orientation of foreign exchange students; monitor the mandatory activities of inbounds, such as school English language courses, volunteer projects and projects focused on the environment.*

(b) guide and monitor the activities of the Club's Exchange Advisors.

(e) Regularly monitor any emergency notifications made through the the TASKING system and report potential or actual emergencies to the main CMT (crisis management team)

3 District Host Family Coordinators:

The RYE Host Families Co-ordinator's duties are:

(a) to work with the ROZ Youth Programmes Co-ordinator responsible for record keeping, communication systems and compliance

(b) Ensure, together with the Chairperson and Inbounds Coordinator, the qualification and training of all host families for their certification, must also monitor the work of the club advisors

(c) keep updated on the communications and any changes in the youth's families inbounds, including regularly monitoring any emergency notifications and reporting potential or actual emergencies to the main crisis management team.

4 School Coordinators:

The RYE Schools Co-ordinator's duties are:

(a) Ensure that communications are maintained Must keep in contact with the designated coordinators of partner schools, informing the activities that are developed by the Youth Exchange Program

5 ROZ Youth Programmes Co-ordinator:

The ROZ Youth Programmes Co-ordinator's duties are:

(a) generally to provide the infrastructure to enable compliance actions to be recorded and available to be accessed by the qualified Rotary Officers that are provided with audited access on a need to know basis.

(b) provide logins and capability for the Rotary Officers to maintain Privacy controlled information required to ensure that inbounds enrolled school t, contact telephone numbers for the inbounds, their counsellor(s) and host parent(s) are available to be accessed by the qualified Rotary Officers that are provided with audited access on a need



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

to know basis.

(c) monitor any emergency notifications and, if necessary report potential or actual emergencies to the core crisis management team.

6 Club Exchange Officers:

The role of the Exchange Officer, whether Rotary or Rotaract, is to:

(a) to work with the ROZ Youth Programmes Co-ordinator responsible for record keeping, communication systems and compliance

(b) establish the link between the Club, Exchange Student, Host Families, Counsellor, School, and District Youth Exchange Committee, and build on them a solid and well-structured program. T

(c) regularly monitor any emergency notifications and report potential or actual emergencies to the main CMT (crisis management team).

7 Rotary Club Exchange Advisers:

It is the role of the Advisor to:

(a) to work with the ROZ Youth Programmes Co-ordinator responsible for record keeping, communication systems and compliance

(b) to support the inbound youth during their exchange year. The Club Advisor is the Rotarian that the student will have the most contact with. It is advised that he/she is neither a member of the host family nor the Exchange Officer at the club. If a problem arises, it is important that the young person feel free to speak with and does have regular contact with their assigned Counsellor.

(c) accompany the host families, providing family changes, adapting the young people to school, cultural, social and family activities.

(d) regularly monitor any emergency notifications and report potential or actual emergencies to the main crisis management team.

8- Any other members of the youth exchange team:

Duties are to:

(a) participate in all activities related to Youth Exchange Programs as delegated to them



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

(b) be and remain certified to participate in Youth Programs, and

(c) regularly monitor any emergency notifications and report potential or actual emergencies to the main crisis management team.

CRISIS SITUATIONS & RESPONSE PROTOCOLS

Each section below outlines crisis situations by type and the appropriate protocols to be followed depending on the Level.

The Core CMT and ultimately the district governor decides the level of a crisis and when to escalate or de-escalate a crisis.

Note: Below are two examples of a response protocol based on three crisis levels.

Develop a set of response protocols based on each type of crisis as noted in the table of contents or include additional types according to your local circumstances. Because each type of crisis requires a different response, it is important to have clearly defined definitions for each level and the response protocols for each. Also consider developing checklists for each type of crisis as noted in the best practices section.

4.2. Accidents

4.2.1. Level I – Minor Injury/Accident:

The emergency (or perceived emergency) does not currently present a significant health or safety risk and does not appear to require medical intervention and involves only one or two people.

- (a) Immediately alert the on-site or responsible health, safety, or medical personnel to assess the injury/accident
- (b) Have a qualified/trained volunteer administer first aid to the injured person(s) and safely transport them to the designated area of refuge if needed
- (c) Continue to monitor the affected person(s) and contact emergency medical assistance if necessary (escalate to Level II)
- (d) Contact the parent/guardian within 24 hours of the injury/accident
- (e) Report the injury/accident to the District Youth Protection Officer, the District Insurance Officer and Rotary International within 72 hours of the injury/accident



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for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

If more than two people are affected by a minor injury/accident, follow the response protocol for Level II.

4.2.2. Level II – Serious Injury/Accident:

The emergency (or perceived emergency) may present a significant health or safety risk and requires medical intervention for one or more person or more than two people are affected by a minor injury/accident:

- (a) Immediately alert the on-site or responsible health, safety, or medical personnel to assess the injury/accident
- (b) Immediately contact emergency medical services
- (c) Have a qualified/trained volunteer administer first aid to the injured person(s) and safely transport them to the designated area of refuge if needed
- (d) Ensure that other youth program participants are being supervised while attending to
- (e) the needs of the injured person(s)
- (f) As soon as emergency medical services arrive, contact the parent/guardian and District Youth Protection Officer and the District Insurance Officer
- (g) If the person(s) are required to be transported to a hospital or emergency medical facility, designate an adult volunteer to accompany them and other adult volunteers to supervise remaining youth program participants
- (h) Contact the designated person responsible for insurance-related questions or claims to determine what steps may be required to report to insurance provider(s)
- (i) Determine if there will or may be any media coverage and activate your media crisis response protocols
- (j) Report the injury/accident to the District Youth Protection Officer and Rotary International within 72 hours of the injury/accident.

4.2.3. Level III – Critical Injury/Accident:

The emergency (or perceived emergency) presents a significant or critical health or safety risk and requires immediate medical intervention or life-saving procedure:

- (a) Immediately alert the on-site or responsible health, safety, or medical personnel to



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999
assess the injury/accident

- (b) Immediately contact emergency medical services
- (c) Have a qualified/trained volunteer administer first aid to the injured person(s) and safely transport them to the designated area of refuge if needed
- (d) Ensure that other youth program participants are being supervised while attending to the needs of the injured person(s)
- (e) As soon emergency medical services arrive, contact the parent/guardian and District Youth Protection Officer and the District Insurance Officer
- (f) Designate an adult volunteer to accompany the person(s) to a hospital or emergency medical facility and designate other adult volunteers to supervise remaining youth program participants
- (g) Contact the designated person responsible for insurance-related questions or claims to determine what steps may be required to report to insurance provider(s)
- (h) Determine if there will or may be any media coverage and activate your media crisis response protocols
- (i) Report the injury/accident to the District Youth Protection Officer, the District Insurance Officer and Rotary International within 72 hours of the injury/accident .

Note: Create additional levels or protocols depending on your local circumstances.

4.3. Physical Health Emergencies

4.3.1. Level I – Monitor:

The emergency (or perceived emergency) does not currently directly impact students or volunteers, and is perceived to be a contained/isolated situation:

- (a) Distribute or communicate information to volunteers, students and their parents, and RI related to how the emergency is impacting/has impacted nearby cities, countries, etc., to create awareness and educate stakeholders on how to protect themselves, and to assure them that the situation is being monitored by your crisis management team.
- (b) Continue to monitor developments, including any alerts and updates issued by federal, state and local government agencies for further guidance.
- (c) On any health emergency immediately convene the CMT to develop a further more



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999
detailed plan as required by local law, local health authorities and always in
accordance with the directions of Rotary International.

4.3.2. Level II – Plan:

The situation does not yet directly impact students or volunteers but has developed or progressed/spread to other areas and is no longer isolated or contained:

- (a) Activate crisis team to monitor developments, prepare for and plan for next level of severity
- (b) Prepare formal communication to individuals who express concerns about the developments, as well as a proactive, informational communication to all stakeholders (volunteers, students and parents)
- (c) Identify the criteria that would require activities, such as in-person gatherings or travel to be postponed or cancelled
- (d) Identify the criteria that would require program participants to self-isolate, quarantine, seek medical treatment, or be repatriated
- (e) Develop a specific plan based on the criteria identified should the emergency spread to or directly impact your region, including students and volunteers, and communicate this plan to all. The plan should include specific dates that actions will be taken if the situation does not improve or worsens
- (f) Contact the designated person responsible for insurance-related questions or claims to determine what steps may be required to report to insurance provider(s) and to access any resources the carrier may have available .

4.3.3. Level III – Act:

The emergency directly affects your district/region, students and volunteers:

- 1. Implement actions steps identify in Level II to prevent risk to students or volunteers (e.g. cancelling activities, events, or travel)
- 2. Communicate emergency and contingency procedures to students, volunteers and parents
- 3. Communicate emergency and contingency procedures to all relevant local, national, or international government or health agencies as necessary to coordinate repatriation or safe travel
- 4. Contact the designated person responsible for insurance-related questions or



CRISIS MANAGEMENT PLAN

for Rotary Zone 8 – Oceania Districts 9910,9920,9930,9940 and 9999

claims to determine what steps may be required to report to insurance provider(s) and to access any resources the carrier may have available

5. Issue refunds or notice of cancellation for all pre-paid or registered events, trips, or other program-related costs
6. Notify RI within 72 hours of any emergency medical treatment, hospitalization, or repatriation of program participants related to a health emergency
7. Continue to monitor and adapt procedures as situation develops



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4.4. Mental Health Emergencies ³

Mental health emergencies may include (but are not limited to) disorderly or psychotic behaviour, severe depression or withdrawal, drug or alcohol abuse, ideation, suicidal or homicidal threats or attempts, and self-harm.

Volunteers should never intervene in medical or mental health situations unless they have been trained and are qualified to do so.

Instead, they should utilize the expertise of local resources and professionals.

The ROZ Youth Programmes Co-ordinator can provide access to the Doctors and Psychologists, who will carry out the first assistance to the youth. If necessary, other referrals such as hospitalization of the young person, the referrals to be adopted are the same as for physical health emergencies.

4.5. Abuse, Harassment or other traumatic events ⁴

The primary resources are the processes under the Rotary International Youth Protection policy and its associated documents and learnings through the Learning Centre.

Youth in New Zealand have government sponsored, trained, vetted resources in all agencies involved with youth and resources such as SafeToTalk⁵ and those other agencies set out in Appendix 3.

Key issues that are causes of stress or trauma should be directed by the youth programme participant to their Counsellor or in the case of a short-term programme, the programme counsellor.

Examples are:

1. Financial difficulties
2. Loss of personal property
3. Loss of identity or identity and/or travel documents
4. Confusion as to duties and instructions

³ Drawn from the District 4370 Crisis Management plan

⁴ The District 4370 Crisis Management plan has a section which complicates the guidance provided by RI in the 775_abuse_harassment_allegation_reporting_guidelines_en_Zone8_Oceania_2023 and Rotary International District Youth Protection Policy_en_- Zone 8 Oceania - NZ version March 2023. This section has accordingly been simplified

⁵ See <https://www.safetotalk.nz/>



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5. Other issues which while not affecting the mental health of the youth programme participant but which are a cause of worry or anxiety such as academic, sporting or socialisation concerns.

4.6. Tragedy⁶

If the life of any youth programme participant is affected by a tragedy, such as the youth participant being unable to continue the programme (for whatever reason), going missing or, suffering a mortal event the CMT should convene, identify the affected parties and develop a plan for the specific tragedy.

5. CRISIS RESOLUTION

5.1. De-escalating and Declaring a Crisis Resolved:

The District Governor shall be responsible for de-escalating a crisis (moving a crisis from a higher level to a lower level) and declaring a crisis resolved according to the following:

5.1.1. De-escalating a crisis:

A crisis level will be moved from a higher level to a lower level,

when appropriate, when the all steps in the response protocols have been followed, but there is still a need to maintain a level of crisis awareness or response, and that response is more appropriate to the protocols described by a lower level. The District Governor will communicate with the Core CMT in the event of a de-escalation of a crisis and activate the notification protocols as necessary.

5.1.2. Declaring a crisis resolved:

A crisis will be deemed resolved when the all steps in the response protocols have been followed, there is no immediate risk to young people and volunteers, and there is no need to maintain a level of crisis awareness or response. The District Governor will communicate with the Core CMT in the event of a resolution of a crisis and activate the notification protocols as necessary.

⁶ The District 4370 Crisis Management plan has detailed sections dealing with COVID, missing people and death. Those sections are highly prescriptive and may not provide the best considered planning. The responsibility for such events lies with the CMT and it is the CMT that should be leading the specific event response. Those sections have accordingly been simplified.



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Note: Outline additional criteria for de-escalating or resolving a crisis and response protocols for each as according to your local circumstances.

5.2. Debriefing:

Immediately following a resolved crisis, a crisis simulation, or a narrowly avoided crisis, the Core CMT shall conduct a debriefing. Members of the Additional CMT may also be included, as necessary. The purpose of the debriefing is to ensure the response protocols were followed, if there are any action steps needed as a result of a crisis resolution, including, but not limited to, making updates to the crisis management plan and conducting emergency trainings.

A copy of the debriefing questionnaire (Appendix B) shall be included with any formal records and the district governor shall be responsible for ensuring that any actions recommended as a result of the debriefing are implemented.

Note: Debriefings can be formal or informal, but should always include a thorough and honest assessment of the crisis response so that improvements can be made.

5.3. Updating the CMP & Emergency Training:

5.3.1. Review of the CMP – Crisis Management Plan

It is important to review the crisis management plan regularly.

This plan shall be updated as follows:

- (a) Annually prior to the start of the new Rotary year at the first meeting of the District Board in July of each year.
- (b) Following any changes to leadership or other youth protection policies.
- (c) As a result of recommendations from a debriefing following a resolved crisis, a crisis simulation, or a narrowly avoided crisis.

5.3.2. Emergency (unscheduled) trainings

Emergency (unscheduled) trainings shall be conducted as follows:

- (a) Immediately following a resolved crisis when the results of a debriefing reveal a need to do so.



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- (b) If a crisis or emergency that involves young people is narrowly avoided, especially when the results of a debriefing reveal that youth protection policies or response protocols were not followed.

Note: These may not be the only circumstances that warrant an update to your crisis management plan or that may require additional training. Outline additional requirements according to your local circumstances.

6. OTHER IMPORTANT CONSIDERATIONS

6.1. Supporting Young People During a Crisis

Young people may require additional support, mental health counselling, or medical attention during or immediately following a crisis. It is important to check-in with young people who have experienced a crisis themselves as well as others who may have been present during an in-person emergency or who may also be indirectly impacted (friends, family, or others close to someone who experienced a crisis).

The following procedures should be followed during a crisis and immediately following a crisis:

- Assess the physical, mental, and emotional state of young people directly or indirectly impacted by a crisis
- Be supportive but also respect the young person's right to privacy or confidentiality if there is no reporting requirement
- Schedule a follow-up with anyone directly or indirectly impacted by a crisis with an appropriate person (Club counsellor, district Youth Protection officer, and the District Insurance Officer etc.)
- Offer additional support services as set out in APPENDIX C - List of Community and Government Services.

Note: Outline additional types of support that your district can offer according to your local circumstances or what types of professional services your district has contracted or has access to as part of your youth protection policies.



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6.2. Administrative Protocols

6.2.1. Reporting:

All required reporting (district-level, local, state/provincial, national, international, and RI) shall be completed within the designated required time-frame.

6.2.2. Record-keeping:

An official record of a crisis response, including the corresponding completed debriefing questionnaire, along with any other relevant materials (press/media releases, media coverage, insurance claim application forms, official letters, email correspondence, police reports, etc.) shall be filed along with other private and confidential reports, accessible to only those with a need to review the record.

Note: Outline the specific required reporting time-frames either in this section or reference where they might be noted in your district youth protection policies. Outline additional record-keeping requirements according to your local circumstances.

6.3. Insurance and Expenses

Insurance: The district maintains liability insurance which can include coverage for property damage incurred in an emergency/crisis. Review the policy coverage/limits for additional information and policy reporting guidelines. All insurance-related questions or requests to submit a claim must be referred to the District Insurance Officer by way of filing a Helpdesk ticket which will be automatically distributed to the Zone 8 - Oceania the Insurance team.

The Helpdesk ticket form is triggered from this URL.

<https://rotaryoceania.zone/helpdesk-forms>

Note: A student's travel insurance should provide medical, repatriation, and evacuation coverages. Know the policy requirements, and the process for activating coverage, reporting a loss, and submitting a claim

6.4. Expenses:

Each district maintains an emergency crisis management fund in the event that there are expenses incurred that require immediate payment to provide for the safety and well-being of youth and volunteers, including expenses that may be later reimbursed by a liability insurance provider and those that may not be reimbursed. To the extent possible, all



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expenses must be approved in advance by the District Treasurer at treasurer@rotarydistrictxxx.org and all receipts must be submitted for reimbursement and record-keeping. Alternatively expense claims can be made by submitting an Expense Claim through the Flectra DASHBOARD.

Note: Reference the name and contact information for your insurance provider or note where to find coverage and policy information, and designate a main point of contact for insurance-related questions or claims. Crises can be expensive, especially when there may be costs not covered by insurance. Consult with your district finance committee and insurance provider to determine how much you should budget for an emergency crisis management fund and how those funds will be kept, audited, and managed. Outline any additional procedural considerations according to your local circumstances.

6.5. Media Crisis Guidelines

In the event of a media inquiry, request for comment, interview, or other details related to a crisis, the designated media spokesperson shall be the District Governor, unless otherwise noted. Any request by the media should be directed to **currendgtrain@rotaryoceania.zone**

All volunteers should be instructed as part of their crisis training to not respond to or otherwise comment on a crisis situation and rather refer all inquiries to the designated spokesperson. All volunteers should refrain from commenting on or otherwise sharing published content involving a crisis and refer the content to the designated spokesperson.

Note: Outline additional guidance, procedural considerations, and responsible people according to your local circumstances. Refer to [Rotary's Media Crisis Guidelines](#) for additional guidance when developing your district media crisis guidelines.



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APPENDIX A - DISTRICT CONTACT LIST & AND CRISIS NOTIFICATION PROTOCOLS

These contact list and “Distribution Lists” within the Rotary Oceania email server.

The Distribution lists are regularly updated and reviewed in June each year for changes on 1 July.

The primary method of managing tasks is by filing a HELPDESK tickets at

youthexchange.org.nz

Anyone who may need to contact those on this list in the event of an emergency (students, parents, host families, on-site medical personnel, etc.) should file a Helpdesk ticket and can also communicate by using the Distribution Lists by email to:

DG TRAIN = **currentdgtrain@rotaryrotaryoceania.zone**

YOUTH PROGRAMMES GENERALLY = **youth-programmes@rotaryoceania.zone**

RYE DISTRICT CHAIRS = **ryechairs@rotaryoceania.zone**

DISTRICT YOUTH PROTECTION OFFICERS = **ypochairs@rotaryoceania.zone**

DISTRICT INSURANCE OFFICERS IN OCEANIA = **nzdilos@rotaryoceania.zone**



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APPENDIX B - SAMPLE DEBRIEFING

QUESTIONNAIRE

This questionnaire should be customized according to your local circumstances and include clear instructions, designate a responsible person, and indicate a realistic timeline for follow-up:

Section 1 – Crisis Overview

Crisis Type:

Crisis Level:

Brief description:

Date(s) occurred:

Section 2 – Crisis Response Check-list

☐ Yes ☐ No

1. Were the crisis type and level appropriately identified?

☐ Yes ☐ No

2. Was the crisis level appropriately escalated/de-escalated?

☐ Yes ☐ No

3. Were the response protocols followed according to the crisis type/level?

☐ Yes ☐ No

4. Were the notification protocols followed appropriately?

☐ Yes ☐ No

5. Were the reporting requirements followed appropriately?

☐ Yes ☐ No

6. *If reporting required:* Was a report submitted to RI within 72 hours?

☐ Yes ☐ No

7. Was an insurance carrier notified?

☐ Yes ☐ No



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8. Was the crisis resolved appropriately?

If any answer is marked “No” describe below for all instances:

Example: 1. At first we thought the crisis was only a Level 1, but after reviewing it again we determined it was actually a Level 2.

Section 3 – Crisis Management Plan Updates and Emergency Training

☐ Yes ☐ No

1. Does the Crisis Management Plan need to be updated?

If yes, describe what updates are required and include details in Section 3:

Example: The crisis definitions for each type of crisis will be updated with more detail to make it easier to identify the type and level of each crisis.

☐ Yes ☐ No

2. Is an emergency training required?

If yes, describe what updates are required and include details in Section 3:

Example: The Core CMT will conduct a 30-minute virtual meeting with entire Crisis Response Team after the crisis definitions and levels are updated to make sure everyone is updated.

Section 4 – Crisis Resolution Follow-up

Outline all follow-up steps required, the responsible person for each, and a timeline to complete the action steps:

Follow-up

Responsible person

Timeline

Example

Update the Crisis Management Plan

DG, Core CMT

4 weeks or by

(insert date)



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Ex. Conduct online Zoom training to share the

updated Crisis Management Plan

District Youth Protection

Officer, Core CMT

6 weeks or by

(insert date)

Section 5 – Acknowledgements

The underwritten acknowledge that they have participated in the crisis debriefing and agree to

any follow-up actions described in Section 4.

Print name

Date

Print name

Date

Print name

Date

Print name

Date

Print name

Date

Print name

Date

Print name

Date



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APPENDIX C - List of Community and Government Services

This list provides links to government agencies or community services that may be appropriate to provide support to an issue arising from or during a Rotary programmes or event.

Service Name	Description	Link	Phone
Alcohol and Drug Helpline	For people dealing with an alcohol or other drug problem	Alcohol and Drug Helpline(external link)	0800 787 797 or online chat
Anxiety Helpline	Anxiety counselling	Anxiety phone line	0800 269 4389
Are you OK – Family Violence(Steps and support for safety for you and your whānau whenever you're ready	Are you OK – Family Violence	
Depression Helpline	Trained counsellors about how you are feeling or to ask any questions)	Depression Helpline(external link)	0800 111 757 or free text 4202
Family Services 211 Helpline	For help finding (and direct transfer to) community based health and social support services in your area.	Family Services 211 Helpline(external link)	0800 211 211
Lifeline(external link)	Support for people at risk of harming themselves	Lifeline(external link)	0800 543 354 (0800 LIFELINE) or free text 4357 (HELP)
Male Survivors of Sexual Abuse Aotearoa New	Support for males that may have suffered sexual	Male Survivors of Sexual Abuse Aotearoa New	

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Service Name	Description	Link	Phone
Zealand	abuse	Zealand(external link)	
OUTline NZ	Provides confidential telephone support for sexuality or gender identity issues; 9 am to 9 pm weekdays, and 6 pm to 8 pm weekends)	OUTline NZ(external link)	0800 688 546
Rape Crisis	Support after rape or sexual assault	Rape Crisis(external link)	0800 883 300
Safe to talk	(Available 24/7), Free and confidential information and support from trained counsellors for people affected by sexual harm in any way.	Safe to talk(external link)	0800 044 334, free txt 4334 email support@safetotalk.nz
Victim Support	This free Government service provides emotional and practical support, information, financial assistance, referral to other support services and advocacy for the rights of victims.	Victim Support(external link)	
The LowDown	A space created a space created with	The LowDown	

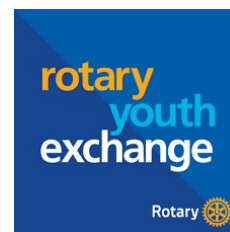
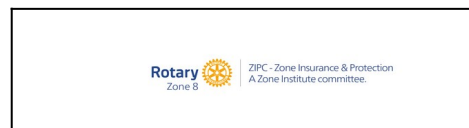
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Service Name	Description	Link	Phone
	rangatahi, for rangatahi. Find support here for your hauora, identity, culture and mental health		
Skylight(external link)	For trauma, loss and grief; 9am–5pm weekdays	Skylight(external link)	0800 299 100
Ministry of Health	For more digital tools and resources	Ministry of Health(external link)	

END OF DOCUMENT

Zone	Zone 8 – Australasia and Oceania
Institute Committee	Zone Insurance & Risk Management
Sub-Committee	Oceania (NZ and Pacific Islands 17 Countries across 5 Districts)
Project Start Date	13 November 2024
Sub-Committee Chair	Craig Horrocks
Revision Number	100
Circulation	DG train 9910,20,30,40,99 (Oceania) RYE Oceania District Chairs Zone 8 Oceania Youth Protection Officers ZIPC Oceania Insurance Officers ZIPC Committee for Zone 8 RI – Zone 8 Director RI RYE Team



APPENDIX 12 – Functional requirements

for document storage

associated processes

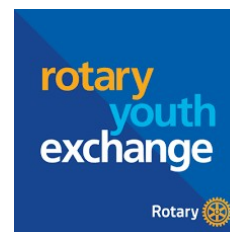
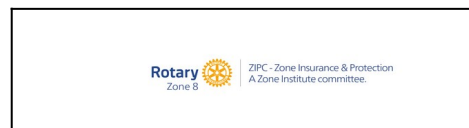
Requirement	Module(s)	Features
GDPR requirements	Website GDPR In Odoo	<ul style="list-style-type: none"> Integrated with document controls – see DMS section Allows portal user to access their data Allows user requests for data for downloading Allows users to request removal of their data but admin can manage at a field level
Document Management System	DMS Core DMS Document Approval DMS Attachment Document sign – (web_digital_sign – not installed yet) Upload Multiple Attachments From Tree View	<ul style="list-style-type: none"> File Store with directories, access groups Linked to portal (Dashboard) users Using DMS attachment wizard DMS files can be added as an attachment of a document or to a CHAT, WhatsApp etc – saving separate emails and reduces duplicates Portal user added to DMS access groups can their own files – see GDPR. Portal or admins can configured with click on “Share” button inside a directory or a file for obtaining a tokenized link

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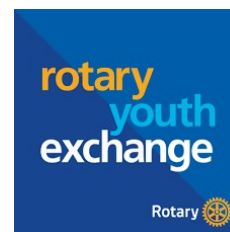
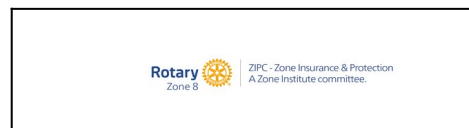
Requirement	Module(s)	Features
		<p>for single access to that resource, no matter if logged or not</p> <ul style="list-style-type: none"> • Document Approval 'managers' can approve or reject documents • Document sign stores a digital signature for a document record and is touch screen enabled so user can add signature with touch devices • Enables users to upload and organize multiple documents directly from the tree view – works in with Document Approval •
User controls (security tools)	User activity audit Hide any menu/submenu items user-wise. User login – detailed log User login alert Schedule Activity to Multiple Users Readonly User Access	<ul style="list-style-type: none"> • Audit helps track the user's activities like create, write, read etc and provides a management UI. • Menu UI - manage menu access control in addition to other base modules such as Groups/functions/role ACL controls • Access Logs - Details access log displays User Login Detail, Including the User Name, Login Date And Time, and IP Address. • Login alert – enables setting for sensitive data - sends login alert to admins (usually special super limited admins group)

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Requirement	Module(s)	Features
		<ul style="list-style-type: none"> Schedule activities – enables scheduling of activity to Multiple Users for requests to update, re-credential if there is a vulnerability etc Read only User Access – enables easy grant read-only access to users
Dashboards	Odoo Dynamic Dashboard	<ul style="list-style-type: none"> Enables tiles, menus and charts can be assigned to portal users by group e.g. exchange student or counsellor uses Blocks system as used in webpage system
HR/students HR/officers responsible	Contracts/agreements Attendances Skills Certifications Events/courses Expense claims (block available for Dashboard)	<ul style="list-style-type: none"> Can store application forms and signed agreements can track attendances can add skills and certifications track events/courses enrolled student can use portal to make expense claims for reimbursement
Volunteer Management	Volunteer attributes add to Contact views	<ul style="list-style-type: none"> Add volunteer skills Categorise with Types Assign to project/task Add tags and Followers Communicate – email, txt msg, WhatsApp, Chat Can be used to create special categories such as Host Parents, Counsellors Can have tile in portal dashboard

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Requirement	Module(s)	Features
Donor Management	Donor attributes add to Contact views	<ul style="list-style-type: none"> Add donor skills Categorise with Types Assign to project/task Add tags and Followers Communicate – email, txt msg, WhatsApp, Chat Can be used to create special categories such as donor tiers Can have tile in portal dashboard
Forms development	All development environments have been created so forms can be developed (depending only finance resourcing) to make it easier to enter the data directly.	Candidate forms <ul style="list-style-type: none"> Initial applications – student expression of interest – hosts 775 volunteer form RYE RI forms