



## **DISTRICT 7815 CRISIS MANAGEMENT PLAN**

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**Appendix A** – Contact List and Notification Protocols (*updated annually*)

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## I. 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 District\_7815 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.

In the event of a crisis, it is important to follow established guidelines to ensure communication of accurate, timely and consistent information to Rotarians and the public, and to provide for the immediate care and protection of all individuals involved in the situation.

Procedures proposed in this Crisis Management Plan incorporate Rotary International's "Guidelines for Youth Exchange Emergencies", and are included APPENDIX C.

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## II. PREPARATION AND CRISIS PREVENTION

### a. Development:

The district's crisis management plan includes a comprehensive assessment of the local risks, in collaboration with the following external agencies:

Mark Markley (WESSEX)  
Worksafe New Brunswick  
Anglophone East School District

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### b. Training Schedule:

District 7815 will provide training regarding crisis management for all individuals involved in the program at the annual outbound orientation weekend held the first weekend in May each year. Participants include all short/long term outbound students, host families, club YEOs and Youth Exchange committee members: Another training session will take place at the annual inbound orientation weekend held the third week of September for the inbound students and their counselors to ensure their knowledge & understanding of the appropriate crisis management processes in District 7815.

c. Planned and Unplanned Simulations

For the purposes of testing for crisis readiness, the District Governor may initiate a planned or unplanned simulation of a crisis. The Crisis Management Team (CMT) will coordinate with the District Governor to ensure that at least one simulation, planned or unplanned, is conducted every year. 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 to avoid confusion.
- The district governor will confirm when the crisis simulation has ended.
- The CMT will immediately conduct a debriefing session as outlined in this document.

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III. District 7815 CRISIS MANAGEMENT TEAM

The district’s 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 CMT, the District Governor shall designate a trained replacement. (Refer to APPENDIX A for list & contact information)

Crisis Management Team:

**District Governor:** 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. The District Governor Elect or other designate should also be available in case the governor is impacted by the crisis or otherwise unable to perform their crisis management duties.

**District Youth Protection Officer:** 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 Chair:** 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 Chair:** 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 Chair:** 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 Youth Exchange Secretary:** Regularly monitors any emergency notifications and reports potential or actual emergencies to the CMT. Responsible for ensuring all CMT members, counselors and host families are subscribed to automated alerts from their respective government agencies, health agencies, or emergency notification systems in the event of a crisis.

#### **IV. CRISIS SITUATIONS & RESPONSE PROTOCOLS**

##### **Initial Response for Accidents & Physical Health Emergencies**

When an incident first occurs, use the information in this section to respond.

**Safety First.** Take action to protect the student, family or whoever needs protecting. You may need to call an ambulance, fire department, police or remove the student from a home or situation when in danger.

**Take a Few Minutes.** Once the initial situation is stabilized, take a few minutes to create a plan of action. Think about what you need to do BEFORE doing something without a plan. Follow the steps with this document.

**Doing something without a plan may later cause you problems.** You may need to activate your Club Crisis Management Team. MAKE NOTES of the time, date, student involved and regarding what happened. In your notes answer the questions of who, what, where, when, how etc. The few minutes you take now will help everyone from this point forward. Call for help from the District Youth Exchange Chair to assist you in your plan.

##### **Level I (Minor Injury/Accident) -- Initial Response**

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

1. Immediately alert the on-site or responsible health, safety, or medical personnel to assess the injury/accident.
2. 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.
3. Continue to monitor the affected person(s) and contact emergency medical assistance if necessary (escalate to Level II)
4. Contact the parent/guardian within 24 hours of the injury/accident.
5. Report the injury/accident to the District Youth Exchange Chair and District Youth Protection Officer and Rotary International within 72 hours of the injury/accident.

### Level II (Serious Injury/Accident) -- Initial Response

The emergency (or perceived emergency) may present a significant health or safety risk and requires medical intervention.

1. Immediately alert the on-site or responsible health, safety, or medical personnel to assess the injury/accident.
2. Immediately contact emergency medical services
3. 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.
4. Ensure that other youth program participants are being supervised while attending to the needs of the injured person(s)
5. As soon as emergency medical services arrive, contact the parent/guardian, District Youth Exchange Chair, and District Youth Protection Officer
6. 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.
7. Contact the designated person responsible for insurance-related questions or claims to determine what steps may be required to report to insurance provider(s)
8. Determine if there will or may be any media coverage and activate your media crisis response protocols.
9. Report the injury/accident to the District Youth Protection Officer and Rotary International within 72 hours of the injury/accident.

### Level III (Critical Injury/Accident) -- Initial Response

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

1. Immediately contact emergency medical services
2. Immediately alert the on-site or responsible health, safety, or medical personnel to assess the injury/accident.
3. 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.
4. Ensure that other youth program participants are being supervised while attending to the needs of the injured person(s)
5. As soon emergency medical services arrive, contact the parent/guardian and District Youth Protection Officer
6. 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.
7. Contact the designated person responsible for insurance-related questions or claims to determine what steps may be required to report to insurance provider(s)
8. Determine if there will or may be any media coverage and activate your media crisis response protocols.
9. Report the injury/accident to the District Youth Exchange Chair, District Youth Protection Officer, and Rotary International within 72 hours of the injury/accident.

## Level I Physical Health Emergency Initial Response – Monitor

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

1. 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.
2. Continue to monitor developments, including any alerts and updates issued by federal, provincial, and local government agencies for further guidance.

## Level II Physical Health Emergency Initial Response – 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:

1. Activate crisis team to monitor developments, prepare for and plan for next level of severity.
2. 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)

3. Identify the criteria that would require activities, such as in-person gatherings or travel to be postponed or cancelled.
4. Identify the criteria that would require program participants to self-isolate, quarantine, seek medical treatment, or be repatriated.
5. 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.
6. 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.

### Level III - Physical Health Emergency Initial Response – Act

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

1. Implement actions steps identified 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 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 the situation develops.

## V. CRISIS RESOLUTION AND DEBRIEF

De-escalating a Crisis and Declaring a Crisis Resolved

The District Governor, in collaboration with the District Youth Exchange Chair, shall be responsible for de-escalating a crisis and declaring a crisis resolved according to the following:

- Deescalating a crisis: a crisis level will be moved from a higher level to a lower level, when appropriate, when 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.

- Declaring a crisis resolved: a crisis will be deemed resolved when 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.

### 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 training.

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.

### Updating the Crisis Management Plan and Emergency Training

It is important to review the crisis management plan regularly. The plan shall be reviewed as follows:

- Annually prior to the start of the new Rotary year by May 31st.
- Following any changes to leadership or other youth protection policies.
- As a result of recommendations from a debriefing following a resolved crisis, a crisis simulation, or a narrowly avoided crisis and updated as necessary.

### Emergency (unscheduled) trainings shall be conducted as follows:

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

## VI. CRISIS COMMUNICATION PROCEDURES

Once the initial response steps are underway, make sure crisis communication steps within this section are followed.

### Inbound Crisis Communication Procedure

In the event of death, serious injury, serious illness, or other problem deemed serious by the Host Club, the Host Club YEO shall contact the District Governor or their designate immediately and provide the following detail as a minimum:

1. Name of local Rotarian to be contacted in this specific emergency and necessary contact information.
2. Host Club name.
3. Name of student or students involved.
4. Home country of student or students involved.
5. If possible, Sponsor District Number (overseas).
6. As much detail as possible involving the crisis.

The District Governor will:

1. Immediately contact **all members** of the District CMT and pass on the crisis information.
2. As necessitated by the nature of the crisis, request team members to contact or research information relative to the crisis, using the “Guidelines for Youth Exchange Emergencies” as a baseline.
3. Continue to keep all members of the District CMT informed and advised of the crisis status.
4. The District Governor or their designate shall notify the respective Embassy/Consulate for the student and their Sponsor District overseas counterpart.

Upon notification of the crisis:

1. The District Governor or designate shall be responsible for contacting and advising Rotary International of crisis nature and status. The District Governor or designate shall be responsible for keeping Rotary International updated throughout the course of the crisis.
2. To ensure that all that need to be informed of the crisis in an expedient and timely fashion, the Crisis Notification Protocols in Appendix A must be followed.

### Outbound Crisis Communication Procedure

This guideline addresses an emergency involving a D7815 student or students hosted by an overseas District.

In the event that a member of the D7815 Youth Exchange Committee is notified of the death, serious injury, serious illness, or other problem involving a D7815 Outbound Student, the person who receives the information shall contact the District Governor or designate

immediately and provide the following details at a minimum:

1. Name of student involved.
2. Sponsor Rotary Club (or, in the event of a regional crisis, the name of the Rotary District)
3. Host District number.
4. The nature of the crisis and as much detail as possible involving the crisis.

The District Governor or designate will:

1. Immediately contact all members of the District CMT and pass along the crisis information.
2. As necessitated by the nature of the crisis, request team members to contact or research information relative to the crisis, using the “Guidelines for Youth Exchange Emergencies” as a baseline.
3. Continue to keep all members of the District CMT informed and advised of the crisis status.
4. Will continue to keep in contact with the Responsible Officer for the region where the crisis is occurring and work through the Responsible Officer to resolve the crisis.
5. The District Governor or designate shall contact the Canadian Embassy/Consulate in the host country for the student and their Host District overseas counterpart.

Upon notification of the crisis:

1. The District Governor or designate shall be responsible for contacting and advising Rotary International of the crisis nature and status. The District Governor or designate shall be responsible for keeping Rotary International updated throughout the course of the crisis.
2. To ensure that all that needs to be informed of the crisis in an expedient and timely fashion, the Crisis Notification Protocols in Appendix A must be followed.

## **VII. PANDEMIC MANAGEMENT PROCEDURES**

This section includes unique considerations for the COVID-19 and other pandemics. Procedures from Sections V and VI should continue to be followed; the following are additional considerations and requirements for those situations related to COVID-19.

In June, 2020, the Rotary International Board of Directors met to provide guidance and stipulations to districts who choose to participate in Rotary Youth Exchange during the COVID-19 pandemic. These procedures will apply to any pandemic, including COVID 19 or future pandemics or health crises that may be declared from time to time.

District 7815 comprises four different provinces (New Brunswick, Newfoundland & Labrador, Nova Scotia & Prince Edward Island). Additionally, the province of New Brunswick has two

distinct health authorities, Horizon Health (English) and Vitalite (French). As a result, responses may vary from club to club as mandated by the provincial authorities in the province of each club. The committee shall be guided and consider directions from one province in determining a district wide response.

## Monitor Any Pandemic Developments

### Monitor Updates from National, Provincial and Local Government and Health Authorities

1. The Crisis Management team shall periodically review updates from the local and provincial health organizations, as well as Health Canada to determine changes in travel restrictions, quarantine and isolation requirements, health protocols and border closings.
2. In the event that changes in information provided in any updates that may require additional protective measures, inquiries will be made with Inbound Coordinators and/or Club YEOs to check the living situations for each Inbound student to:
  - a. Assess any new risk factors in the student's living situations; for example, someone in the host family home being exposure to the virus, which results in quarantine
  - b. Inquire about host family dynamics; for example, student behavior or concerns about the amount of time spent at home if school is not in session
  - c. Inquire about any changes in the community or at school which might elevate risk factors for virus exposure
3. Direct any changes that may be required in light of the updates or information received.

### Communicate with Overseas Partners

The Outbound Chair identifies a point of contact within each of our active overseas partner districts for the purpose of communicating COVID-19 developments.

As part of this process, the Outbound Chair, or a designate, and as circumstances require, shall perform the following tasks:

1. Communicates status with overseas partners to provide information on the living situations of Inbound students within D7815.

2. Requests updates from the partner district related to D7815 students who are on exchange.

### **Monitor Visa and Insurance Status for Inbounds and Outbounds**

In the event that travel plans are disrupted and Outbound or Inbound students are required to stay longer in their host country, Visa and Insurance may become an issue. Visa extensions can be secured, and insurance policies can be extended in 1 month increments.

To avoid issues related to this, the Outbound Chair, will identify timeframes for monitoring this; i.e., for each student, identify specific expiration dates, and create a plan for mitigating this in the event that travel restrictions come into effect.

### **Communication Plan**

During the pandemic, regular communication is critical for making decisions and protecting the health and safety of students and volunteers.

Additionally, the Chair will communicate to the entire D7815 Crisis Management team any significant developments that might warrant immediate action and/or a crisis management response, or a change in plans for the D7815 RYE program.

In situations where monitoring results in Crisis Management, make sure to utilize Crisis Management procedures and communication protocols that include all affected parties.

### **Canceling or Postponing an Exchange Prior to Start**

The following criteria must be met in order to proceed with participation in the RYE Program during the COVID-19 pandemic. If any of these criteria are unmet, the exchange must be canceled or postponed until they are met.

- Student and Natural Parents are comfortable with the Student traveling to the Host District.
- Travel is possible and allowed between the two countries.
- Host District is following Rotary International guidelines for RYE participation.
- Host District Governor is agreeable with RYE participation.
- Host District RYE Chair and Committee are willing to receive the student.
- Host Club is willing to receive the student.
- Host Club has a fully trained and vetted RYE committee that includes a YEO and Counselor.

- Host Club has a trained and vetted Host Family and Backup Host Family who are able to receive the student on short notice in the event that the Host Family's situation changes due to COVID-19.

## Terminating an Exchange Early, Due to Pandemic Reasons

The decision to terminate an exchange due to a pandemic may be made by any of the following individuals.

- Student
- Natural Parents or legal guardian(s)
- Rotary International Board of Directors and Staff
- Host District Governor
- Host District RYE Chair
- Sponsor District Governor
- Sponsor District RYE Chair
- Reasoning for termination due to COVID-19 may include, but is not limited to the following:
  - Growing infection rates place higher risk on Student and Volunteer within the Host Community
  - The Host Club is unable to maintain an active roster of trained and vetted volunteers, including YEO, Counselor, Host Family, and Backup Host Family
  - Medical Care capacity is deemed insufficient for volume of infections within the Host Community
  - School closures
  - Changes in restrictions for travel and gatherings from national, state and local government and health authorities
  - Border and/or travel options between host country and sponsor country are slated for closure, impacting ability for Student(s) to return home at their regularly scheduled date or within the Visa and Insurance effective dates

## Repatriating a Student During COVID-19

Ultimately, the Sponsor District Chair, Sponsor Country Officer, or the Natural Parents are responsible for arranging and paying for the Student's air travel to and from the Host District.



District 7815 highly encourages the use of a travel agency to arrange and support air travel for Students during the COVID-19 or other pandemic because these agencies bring a high level of expertise that benefit Students when itineraries change or cancel.

District 7815 also highly recommends that every student register with their embassy or consulate to remain in contact for changes in travel between the countries, and for opportunities to use repatriation flights, when necessary.

Because flight schedules are unstable during the COVID-19 or other pandemic, these guidelines are recommended for each Student's repatriation journey.

1. Each Host Club YEO and Host District Inbound Coordinator must monitor the status of return flights for Students in their care.
2. Status and changes to these return flights must be communicated with the District Youth Protection Officer and the District RYE Chair.
3. Transporting the Student to the airport for the return flight is the responsibility of the Host Parents, the Host Club YEO, and/or the Host Club Counselor.
4. On the day of travel, identify four points of contact: one from the Host District, one from the Sponsor District, and one each from the Natural Family and the Host Family. Remain in contact with the Student during their journey. The points of contacts should also be in contact with each other to assist and mitigate any issues that arise during the Student's journey.
5. Make sure to confirm arrival at destination, and share this information with all parties on the Student Data and Emergency Contact Form.

## Financial Responsibility for Cancellations and Terminations of an Exchange

When Students sign up for optional tours and trips through independent travel organizations, District 7815 highly recommends that they learn about cancellation policies prior to paying any fees.

Students are responsible for arranging refunds from independent travel organizations. District 7815 is unable to guarantee or support the refund process.

Ultimately, the Sponsor District Chair or the Natural Parents are responsible for arranging and paying for the Student's air travel to and from the Host District.



For students sponsored by District 7815, the cost for repatriation is the responsibility of the Natural Parents, which may or may not be covered by insurance.

## Host Club Preparedness

Host Clubs must remain vigilant in monitoring developments within their community and with their host families' homes. During the pandemic, it's paramount that the YEO and Counselor remain in regular contact with the student and host families to monitor the living conditions and experience for both.

A trained and vetted Backup Host Family must be available at all times. When the Backup Host Family is called upon to host the Student, the Host Club must identify, train, and vet a new Backup Host Family immediately.

Updates to the Student Data and Emergency Contact Form must be made immediately and communicated within 48 hours to the District Youth Exchange Chair, District Youth Exchange Secretary, and to Rotary International.

### **VIII. OTHER IMPORANT CONSIDERATIONS**

#### **a. Supporting Young People During a Crisis**

Young people may require additional support, mental health counseling, 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 counselor, District Youth Protection Officer, etc.)
- Offer additional support services as follows. Notify the District Youth Protection Officer when additional support services are required.



Service type	Provider	Telephone	Email/Text
Telecare	Health Advice	811	N/A
Kids Help Phone	Youth Support Services	1-800-668-6868	Text CONNECT to 686868
Canada Suicide Prevention Service	Suicide Support	1-833-456-4566	Text - 45645
Chimo Helpline (NB)	Crisis intervention & support	1-800-667-5005	N/A
First Nations & Inuit Hope for Wellness Help Line	Mental Health in general support	1 855-242-3310	N/A
Poison Control Centres	Poison & Drug Information	1-844-764-7669	
• New Brunswick		811	
• Newfoundland & Labrador		1-866-727-1110	N/A
• Nova Scotia & PEI		1-800-565-8161	N/A

**b. Administrative Protocols**

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

**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. District 7815 uses MS Teams to store confidential reports and is only accessible to the District Board of Directors. Access can also be limited based on the nature of the documents themselves.

**c. Insurance and Expenses**

**Insurance:** The district maintains liability insurance which can include coverage for bodily injury and/or 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:

Arthur J. Gallagher Canada.

100 Scurfield Blvd.

Winnipeg, MB R3Y 1G4 [www.ajgcanada.com](http://www.ajgcanada.com)

Chris Iwankow (Insurance Agent) [chris.iwankow@ajg.com](mailto:chris.iwankow@ajg.com) +1 204-631-0795

Pat DeGroot Account Manager) [pat.degroot@ajg.com](mailto:pat.degroot@ajg.com) +1 204-988-0161

Expenses: The district maintains an emergency crisis management fund within the district 7815 reserve fund (see reserve fund policy below). To the extent possible, all expenses must be approved in advance by the District Governor and all receipts must be submitted for reimbursement and record-keeping.

**Rotary International District 7815 Incorporated (“D7815” or “District”)  
Reserve and Crisis Management Funds Policy  
Adopted August 28, 2022**

**Goal.**

i) The goal is to implement a D7815 Reserve Fund Policy providing for reserve funds sufficient to ensure that the district will continue to meet its financial obligations.

**2. Definitions**

- a. **“reserve fund”** means a fund held by the District above and beyond the District’s current year’s operating expenses sufficient to ensure that the District will continue to meet its financial obligations.
- b. **“emergency crisis management fund”** means 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.
- c. **“target reserve fund”** means the amount of the **reserve fund, and emergency crisis management fund** determined by the Board annually to provide for foreseen and unforeseen financial contingencies including potential litigation costs. The **target reserve fund** shall comprise D7815’s cash and investments, excluding:
  - i. funds necessary for D7815’s budgeted annual operations including funds required to cover ordinary cash-flow fluctuations.
  - ii. funds restricted by any of the D7815’s By-laws, Manual of Policies and Procedure (MOPP) or otherwise;

- iii. self-financing District Conference expenditures;
- iv. DG Stream expenses covered by RI DG allocations; and
- v. The Rotary Foundation grant for District Foundation Committee and committee expenses which it covers.

### 3. Policy Statement

- a. The Board will establish an annual **target reserve fund** for the District.
- b. Unless otherwise determined by the Board in its annual budget process, the default **target reserve fund** amount will be equivalent to the annual budget of club assessment plus insurance assessments.
- c. When establishing the annual target reserve fund for the District, the Board shall have regard for any CRA filing implications, including without limitation, the \$200,000 asset threshold for filing an annual Not for Profit T-1044 return with the Canada Revenue Agency.

#### d. **Managing and Monitoring the Reserve Fund**

The operating reserve funds shall be invested under the direction of the D7815 Finance Committee in accordance with a written investment policy approved by the Board. If no investment policy has been approved, the operating reserve funds shall be invested in safe, low-risk, liquid vehicles, eligible for Canadian Deposit Insurance Corporation (CDIC) coverage, in order to preserve the ability to access funds quickly without penalty.

#### e. **Use and Replenishment of the Reserve Fund**

##### i. **Replenishing the Target Reserve Fund –**

(1) If at any time the D7815 operating reserve fund is less than the **target reserve fund** amount, the Board shall, unless authorized by a resolution passed by at least a three-quarters vote, budget to restore the operating reserve fund to the level of the **target reserve fund** amount within the next Rotary year. Any such resolution passed by a three-quarters vote must state the rationale for the decision.

##### ii. **Surplus Target Reserve Funds -**

(1) If at any time the D7815 operating reserve fund is greater than the **target**

**reserve fund** amount, the Board, by a resolution passed by at least a three-quarters vote, shall budget for the orderly reduction of the funds in excess of the **target reserve fund**, provided that such reduction would not cause the operating reserve fund to decrease below the **target reserve fund** amount. Any such resolution passed by a three-quarters vote must state the rationale for the decision.

f. **Role of the D7815 Finance Committee**

i The Finance Committee shall (a) recommend to the board the **target reserve fund** amount, (b) monitor and report on Not-For-Profit return filing implications (c) invest the operating reserve fund in accordance with this policy and/or any approved investment policy, (d) recommend the use and replenishment of the operating reserve fund, (e) report and recommend changes in this policy and generally have the responsibility for the oversight and operation of this policy and the applicable funds.

ii Full details of the operating reserve fund and the **target reserve fund** and any excess expenditure and the circumstances leading thereto shall be reported by the Finance Committee and the District Governor to all Clubs within the District at least annually as part of the Annual General Meeting and/or within the annual audited financial statements of the District.

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d. 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, or their designate. 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.

# APPENDIX A - CONTACT LIST AND CRISIS NOTIFICATION PROTOCOLS

**!** This contact list will be updated annually or anytime a change is made in district leadership. This list will be distributed to everyone listed below and 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.)

Name	Role	Email address	Telephone	Notifies
Don Sword	DG, CMT	<a href="mailto:Rotary7815dgsword@gmail.com">Rotary7815dgsword@gmail.com</a>	+1 709-769-8475	All CMT
Jane Simmons	Youth Service Chair, CMT	<a href="mailto:jsimmons@iohs.ca">jsimmons@iohs.ca</a>	+1 709-749-8849	All CMT
Nicholas O'Toole	District Youth Exchange Chair, CMT	<a href="mailto:D7815RYEChair@gmail.com">D7815RYEChair@gmail.com</a>	+1-506- 229-0161	District Inbound & Outbound Coordinators
Adekunle (Ade) Adeyemi	District Long Term Outbound Coordinator	<a href="mailto:adeyemikunle@gmail.com">adeyemikunle@gmail.com</a>	+ 1 506 897 3002	All long-term outbound students & counselors
Anna Gleason	District Long Term Inbound Coordinator	<a href="mailto:d7815ryeinboundcoordinator@gmail.com">d7815ryeinboundcoordinator@gmail.com</a>	+1 313-808-0038	All long-term inbound students, host families & counselors
Vacant	District Short Term Coordinator			All short-term students, host families & counselors
Paula Hiltz	District Interact Chair	<a href="mailto:nason@nbnet.nb.ca">nason@nbnet.nb.ca</a>	+1 506-357-8014	All Interact club school advisors
Lech Krzywonos	Truro Contact	<a href="mailto:lech.krzywonos@nsc.ca">lech.krzywonos@nsc.ca</a>	+ 1 902- 893-0699	All youth, families & volunteers involved in a RYLA program
Michael Morrisson	Rotary Board Director supporting Rotaract	<a href="mailto:Michaelmorrisson13@icloud.com">Michaelmorrisson13@icloud.com</a>	+1 902-218-0949	All district Rotaract Presidents



Name	Role	Email address	Telephone	Notifies
Emmanuel Odejayi	District Youth Protection Officer	<a href="mailto:youthprotectionofficerd7815@gmail.com">youthprotectionofficerd7815@gmail.com</a>	+ 1-902-578-8934	Monitors emergency notifications & informs the CMT

## 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:

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Crisis Level:

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Brief description:

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Date(s) occurred:

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### 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/deescalated?
- 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    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.*

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**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.*

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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.*

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**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
<i>Ex. Update the Crisis Management Plan</i>	<i>DG, Core CMT</i>	<i>4 weeks or by (insert date)</i>
<i>Ex. Conduct online Zoom training to share the updated Crisis Management Plan</i>	<i>District Youth Protection Officer, Core CMT</i>	<i>6 weeks or by (insert date)</i>



### Section 5 – Acknowledgments

The underwritten acknowledge that they have participated in the crisis debriefing and agree to any follow-up actions described in Section 4.

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*Print name* *Date*

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*Print name* *Date*

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*Print name* *Date*

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*Print name* *Date*

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*Print name* *Date*

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*Print name* *Date*

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*Print name* *Date*

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*Print name* *Date*

## APPENDIX C – HOST CLUB PREPAREDNESS FOR YOUTH EXCHANGE

Clubs participating in youth activities should consider forming a Crisis Management Committee. Each Committee Member should be given a printed copy of the District Manual section on Crisis Management and all should be aware of the District Policies on Crisis Management. Suggested Club Crisis Management Team members could include: Club YEO, Club YE Committee, Student’s Counselor, Club President, and Host Parents.

### Guidelines for RYE Emergencies from RI

The following guidelines outline (1) how to prepare in advance for a possible emergency, (2) the individuals to contact should an emergency occur, and (3) the steps to follow during an emergency.

#### Tips for emergency preparedness

- The club counselor should keep the student’s passport and a copy of return flight data readily available at all times. Store these items in a safe place so that they can be accessed 24 hours a day if necessary.
- The district chairperson should have copies of the return flight data and all documents relative to the student’s passport should the student be traveling or in case the student’s documents are not accessible through the club counselor.
- The district Youth Protection Officer should obtain consent from the student’s parents or legal guardians to reissue a student’s passport in the case it is lost, stolen, or inaccessible at time of departure.
- The district Long-Term Inbound Coordinator should share with the sponsoring Long-Term Outbound Coordinator the student’s itinerary and know who will meet the student at the airport upon arrival.
- The sponsoring club should outline who (e.g., club, district, student’s parents, a combination of sources) will pay for the student to return to finish the exchange after being evacuated in the case of a crisis.
- The student’s counselor and current host family should know details regarding all of the exchange student’s travel plans and should ascertain that these travel plans have been approved by the natural parents/legal guardians of the exchange student, especially if the exchange student is traveling to another city or country during the exchange. (See district YEP Independent Travel procedures pertaining to Inbound Students.)
- The exchange student’s parents should issue a written authorization letter (or powers of attorney) naming the host Rotarian counselor, host families, and another Rotarian of the host/receiving club (preferably the host club president), any of whom is to act for the parent in the event of injury or death. This is very important because most government departments and local authorities require it. Some districts have the parents/legal guardians sign a number of

parental consent forms separate from the application form to ensure that each host family and counselor has a copy of the form.

**The letter mentioned above should also authorize the incurring of:**

- Funeral expenses (cost of claiming body, embalming, casket, compliance with legal and government fees, and transportation of casket/body, cremation cost, etc.) to be reimbursed from the insurance policy.
- Expenses of authorized persons (Rotarian counselor and/or host parent) to act on behalf of parent (transportation and hotel charges for travel to place of accident, etc.), to be reimbursed from the insurance policy. The handling of expenses is important as not every host club can afford to incur such immediate expenses. The ability of the club or district to handle immediate costs can prevent a tragic situation from becoming worse and increasing the agony and anguish of the student's parents. The host Rotarian is committed to treat the exchange student as though he/she is his or her own child and will do everything a natural parent would do.

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

When a tragic event occurs, things need to be done quickly. The following people need to be informed immediately:

- Parents/Legal guardians. (In case of death, obtain clear instruction concerning burial, cremation or return of the body. Also ask about memorial service. Consideration must be given to the religion of the deceased.)
- Host family, club counselor, and district Youth Exchange chairpersons.
- Host district governor and the governor of the sponsoring district.
- Host Rotary club, for assistance and guidance.<sup>1</sup>
- Insurance company (and remember to follow up).
- Embassy Officer, to obtain his/her advice.

Procedures to follow when the death of an exchange student occurs:

- Confirm that the deceased is the exchange student.
- Contact all of the above individuals.
- Check with local police for local regulations and obtain a copy of the police report. Reclaim the deceased's possessions, especially the passport.
- Check with the local hospital and mortuary for the claiming of the body and regarding an autopsy. Obtain the death certificate.
- Contact a local undertaker and embalmer. Ensure that the embalmer possesses an internationally recognized practice license so that the embalmed body may cross national borders. (This is to prevent the spread of disease.) Obtain the embalmer's certificate. Order a

suitable casket and arrange transportation to the exchange student’s home country, or arrange for burial or cremation, according to the parents’ wishes.

- Obtain the “sealing certificate.” For the casket to cross national borders, the inside must be metal-lined and sealed. Sealing must be officially witnessed, to prevent smuggling. In order for a sealed casket to leave the country, an export permit is required. For the sealed casket to enter the exchange student’s home country, an import permit is required. An established undertaker should be able to deal with these matters. The embassy can assist in obtaining the two permits.
- Appoint a reputable air-transport agent to airlift the casket to the exchange student’s home country. This is to ensure that all connecting flights are correctly scheduled without risk of the casket being accidentally off-loaded at an intermediate airport. The arrival flight details should be correctly passed to the deceased’s parents so that they can plan to receive the casket. Give copies of the death certificate, embalming certificate, casket sealing certificate, import and export permits, and passport to the transport company and must accompany the casket on the airplane.
- Hold a memorial service for the exchange student. Remember to write a complete report to your district governor. Send copies to Rotary International and to the exchange student’s home district and Rotary club.

Version	Effective Date DD-MMM-YYYY	Summary of Change
1.0	28-JUN-2023	Crisis Management Plan Creation & RI Approval
2.0	26-AUG-2023	Updated Appendix A – Contact List & Crisis Notification Protocols
3.0	3-SEPT- 2024	Updated Appendix A- Contact List