

Insurance Pro Forma

(This form is to be submitted to **DIO prior** to the commencement of any project/event)

To: District Insurance Officer

Email:

The Rotary Club of _____ wishes to advise that it will be conducting the following event/s as part of its activities and requires the event/s to be noted and included under the District Insurance Policies.

1. Is this Event organised and run by Rotary?
2. Brief Description of Activity: _____
3. Date of Activity: _____
4. Duration From: _____
Duration To: _____
5. Location of Activity: _____
6. Will the activity involve participation in any sport, game, match, race, practice, training course, trial, contest or competition? If "YES", please provide copy of Disclaimer for the event
7. Have you been asked by any other organisation or person to
(a) indemnify them as a third party or
(b) hold any other organisation "harmless" under the Rotary Insurance for the activity?
(If yes, refer to your District Insurance Officer for advice before entering into any agreement).
8. Will the event involve persons under the age of 18yrs?
9. Will the event involve amusement rides/devices?
10. Will the event include markets and stall holders?
11. Will alcohol be sold or supplied during the event?
12. Approximate number of community participants: _____
13. Risk Management Form Completed?
14. Certificate of Currency required?
15. If applicable, provide details of parties that are to be noted as interested parties.

Rotarian Contact:	
Details: Phone Number:	
Email address:	

COVER CONFIRMED UNDER ROTARY POLICY	
DATE:	

Note: For repetitive events such a BBQ's your DIO only needs this form to be completed once a year.

Risk Management Form

1. Describe the activity / project being undertaken.

2. If responsible for the sale and supply of alcohol,
 - Are you following the Government's prescribed policy for the responsible serving of alcohol?
 - What measures will be put in place to prevent underage drinking?

3. Have you required any other organisation, group or person who is taking part in the activity to provide their own "Public Liability Insurance"? YES NO

(Other organisations, groups or individuals should have their own Public Liability Insurance Cover, or at least be made aware that they are not covered under Rotary insurance unless specifically noted. Ideally you should obtain a written indemnity from any other organisation, group or third party involved or associated with the activity).

4. Have you been asked by any other organisation or person to (a) indemnify them as a third party or (b) hold any other organisation "harmless" under the Rotary Insurance for the activity? YES NO

(If "YES", refer to your District Insurance Officer for advice before entering into any agreement).

5. Describe the potential hazards (or dangers to the general public and persons working on project).

6. Have there been prior incidents / accidents on this type of project? YES NO

If "YES", detail when, how and the result

7. What action / steps can be taken to reduce the likelihood of it happening?

8. Will the project / activity involve young people? YES NO

If "YES", have the procedures as outlined in the District Youth Protection Policy been followed? YES NO

9. Will the activity involve travel? YES NO

Claims arising from participation in any sport, game, match, race, practice, training course, trial, contest or competition are excluded . If the activity includes participation, will you provide, or have you arranged for a disclaimer to be signed by the participant?	YES NO
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PLEASE DO NOT ASSUME THAT ALL PROJECTS / ACTIVITIES ARE AUTOMATICALLY COVERED UNDER ROTARY'S PUBLIC LIABILITY POLICY

Any queries or questions should be addressed with the district insurance officer in order to obtain agreement from the insurer prior to the commencement of the project / activity.

Risk Management Checklist

	ADEQUATE			COMMENTS
	YES	NO	N/A	
• PREMISES				
Floors				
Surface level				
Not slippery				
Free of debris				
Properly covered				
Stairs/Ramps:				
Surfaces level				
Not slippery				
Free of debris				
Properly covered				
Windows:				
Condition				
Security				
Lighting:				
General				
Emergency				
Fire safety:				
Suitable detection				
Equipment maintained				
Emergency exits				
Emergency signage				
General housekeeping				
Car parks & Driveways				
Sealed/marked				
Free of ruts/holes				
Free of oil/contaminants				
Lighting				
Speed limiting/bumps				
Signage				
Free of debris/vegetation				
Pedestrian access				
External Pathways:				
Free of damage				
Free of debris/vegetation				
Lighting				

	ADEQUATE			COMMENTS
	YES	NO	N/A	
• CONTRACTORS / SUBCONTRACTORS				
All contractors/subcontractors supply proof of liability cover				
Standard contracts drawn up specific work performed				
Formal written security procedures in place				
All security incidents reported to police				
• MACHINERY & EQUIPMENT				
All electrical equipment tested annually by qualified electrical contractors				
All portable electrical equipment/tools tested and tagged in accordance with regulations				
All gas cylinders tested and tagged annually				
All welding/hotwork performed by qualified persons				
Conditions of:				
- Hoists/cranes				
- Elevators/escalators				
- Unregistered vehicles				
All belt/chain/direct couplings between electric motors or other engines/pumps /generators/cutting equipment etc fully covered or otherwise guarded				
Are all hand tools (powered or un-powered) in a good state of repair				
• ENVIRONMENTAL				
Have all hazardous/toxic substances been identified				
Are they currently stored in a secure place				
Is a register of these materials kept				
Are people trained in the use of these materials				
Is all waste disposed of regularly and in accordance with local regulations				
• MISCELLANEOUS				
First aid facilities				
Trained first aid staff				
Alcohol policy in place				
Animal policy in place				
Crowd exposure – adequate signage				
Playground equipment checked and maintained on regular basis				

	ADEQUATE			COMMENTS
	YES	NO	N/A	
• CHILDREN /STUDENTS				
Are children being properly cared for/supervised?				
Do carers/supervisors have proper accreditation and certification (e.g. Blue Cards)?				
Are animal or mechanical rides involved? If "Yes" do the providers of those rides carry adequate Public/Products Liability insurance and has proof been obtained?				
• AMUSEMENT DEVICES AT COMMUNITY EVENTS				
Request specific amusement device information including the:				
a) Amusement device registration with the relevant regulator				
b) Log book for inspection and maintenance of the ride				
c) Emergency plan for the ride				
Conduct due diligence including by independently confirming the registration with the relevant regulator and using ride operators who have been used by other organisations previously.				
Ensure the contractor has public liability insurance.				
Before allowing a ride to operate:				
(a) Conduct a high level risk assessment				
(b) Consider appropriate fencing/security/locks for rides				
(c) Consider suitability of the ride for your event				
(d) Ensure appropriate signage on rides (e.g. you must be this tall to ride etc.)				
(e) Organise safe access points (e.g., assist safe and orderly queuing)				
During ride operation, monitor and supervise the activity (not just ride operators but also guests) and direct any unsafe activity to case.				
• ROTARY IDEALS				
Does the proposed activity / program follow the Ideals of Rotary, being mindful of the appropriateness and ethical standards required by Rotarians?				

General Release and Indemnity

The Rotary Club of

(insert Rotary Club's Name)

("Rotary")

(Insert name of specific Rotary Function/Event)

1. I, *(insert name of Participant)*
of *(insert Participant's Home Address)*
In the State of *(insert State)*
am aware and acknowledge that *(insert intended activity)* involves inherent risks, including the risk of injury to life or death and damage to property and in undertaking such activities, I do so at my own risk.
2. I am also aware that it is a condition of participation in **("Event")** that Rotary, its officers and employees, agents and volunteers are released by me from all liability howsoever arising from injury or damage to both property and person howsoever caused (whether fatal or otherwise) arising out of my participation in the Event whether or not such injury or damage is due to any negligent act, breach of duty, default and/or omission on the part of Rotary, its officers and employees, agents or volunteers.
3. I indemnify Rotary, its officers and employees, agents and volunteers against all loss, damage and expenses (including legal costs on a solicitor and own client basis) arising out of or in connection with any claims, actions, proceedings or demands of any kind arising directly or indirectly as a consequence of my participation in the Event.
4. I acknowledge and agree that my participation in the Event is as a consequence of my own free will and desire and that I have read and understood the above warning, release and indemnity.
5. I warrant that I am 18 years of age or older and am lawfully able to enter into this above release and indemnity or, in the event that I am a minor, I have the permission of my legal guardian to participate in the Event and that my legal guardian has agreed to adhere to the terms of the indemnity below.

Signed

(Full Participant Name)

Dated

(insert date)

To be completed only if the participant is a minor

I, *(insert name of Parent / Legal Guardian)*
of *(insert Parent's/ Legal Guardian's home address)*
am the legal guardian of *(insert name of Participant) ("Participant")*
and consent to him/her participating in the Event.

- I release Rotary, its officers and employees, agents and volunteers from all liability, howsoever arising, from injury or damage to both property and person howsoever caused (whether fatal or otherwise) arising out of the Participant's participation in the Event whether or not such injury or damage is due to any negligent act, breach of duty, default and/or omission on the part of Rotary, its officers and employees, agents or volunteers.
- I indemnify Rotary, its officers and employees, agents and volunteers against all loss, damage and expenses (including legal costs on a solicitor and own client basis) arising out of or in connection with any claims, actions, proceedings or demands of any kind arising directly or indirectly as a consequence of the Participant's participation in the Event.

Signed

(Full Parent / Legal Guardian Name)

Dated

(insert date)

Basic Checklist for an Event

Following receipt of a completed Insurance Pro-Forma

1. Is this a Rotary Event?	YES / NO
2. Does the event present any unique or high risk activities?	YES / NO
3. Is there evidence the Club is aware of responsibilities in regards to:	
<ul style="list-style-type: none"> • Risk Management 	YES / NO
<ul style="list-style-type: none"> • Contractual Liability e.g. Hold Harmless or request for unreasonable indemnity & insurance requirements. 	YES / NO
<ul style="list-style-type: none"> • Compliance with legislation as a minimum Workplace, Health & Safety and Food Handling. 	YES / NO
4. Should a general release and indemnity be used? <i>(Required when participating in any sport, game, match, race, practice, training course, trial, contest or competition)</i>	YES / NO
5. Should Youth Volunteer Information and Declaration Forms be used?	YES / NO
6. Should I refer this to Aon for confirmation of Insurance coverage from our Insurers?	YES / NO
Confirmation that COVID-19 protocols are being observed and follow strictly local health authorities and government websites.	