

U.S. ROTARY CLUBS AND DISTRICTS LIABILITY INSURANCE PROGRAM

Incident Handling Guidelines

When an incident occurs, an *Incident Report* must be completed by the Insured U.S. Rotary club/district and sent to Rotary International Risk Management immediately to allow for a proper investigation. The reporting of an incident may or may not lead to an actual compensable claim.

CCMSI, Inc., the third-party claims administrator contracted to handle general liability claims on behalf of PPH National Insurance Co, will handle the incident investigation, evaluation of liabilities, and coordinating of any defenses (when necessary) for an incident. PPH funds the \$250,000 self-insured retention of general liability policy issued by Lexington Insurance Company.

- 1. Incident Reporting Requirements.** Complete an *Incident Report*, as soon as practicable, with as much detail as possible, but do not delay the reporting due to lack of information. The *Incident Report Form* can be found on the **Gallagher Insurance Website** and should be submitted to PPH National Insurance Co. at claims@rotary.org or by fax to (847) 556-2147.
- 2. Do Not Make Payments or Promise Coverage.** Do not pay any legal or medical costs, assume any obligation or offer/agree to any settlement. Your coverage under the insurance policy may be jeopardized if you voluntarily make a payment, assume any obligation, or incur any expense, other than for first aid, without the insurance company's consent.
- 3. Do Not Admit Liability.**
- 4. Do not** try to handle the claim without the assistance of the insurance company.
- 5. Full Cooperation Required in Investigation of Incident.** Your full cooperation is required to gather the necessary information needed for a thorough investigation, including details of incident, location of incident, description of injuries and names, addresses and phone numbers of involved parties and witnesses.
- 6. Documents Pertaining to Incident.** All documents pertaining to the incident, including contracts, certificates of insurance, demands, notices, summons, or other legal papers, must be forwarded to claims@rotary.org.
- 7. Contact with Claimant or Claimant's Attorney.** Any contact (including calls and/or emails) made by claimant or their attorney should be directed to the claims adjuster assigned by CCMSI to investigate the matter.

U.S. Rotary Clubs & Districts Liability Insurance Program
Incident Report

Complete and return to: PPH National Insurance Co.
 c/o Rotary International
 Risk Management
 Email: claims@rotary.org Fax: (847) 556-2147

Rotary Club/District Information

Rotary Club name & state		Club number	
Name of Rotary club/district point of contact		POC phone #	
		POC email	

Claimant (injured person/entity)

Name		Phone number	
		Email address	
Occupation		Gender	Age
Address			

Has the claimant contacted your club/district? Yes No

Is the claimant a Rotarian? Yes No If no, is the claimant a Rotary volunteer? Yes No

Was the injured person taken to hospital? Yes No If yes, please provide name of hospital

Has a police report been filed? No Yes If yes, please forward a copy to PPH National

Incident Details

Date and time of incident		Incident Location <i>(include venue and address)</i>	
Description of incident			
Description of injury/property damage			
Name of event			

Is the event organized solely by the Rotary club/district? Yes No

If no, what entity (ies) organized the event? _____

Witness Information

Witness name		Phone #	
		Email address	
Witness name		Phone #	
		Email address	

Contracts/Certificates/Other Documents

Did the Rotary club/district enter into any contracts/agreements for the event? Yes No

If yes, please forward a copy to PPH National.

Did the Rotary club/district issue certificates of insurance or additional insured endorsements to other entities for the event? Yes No *If yes, please forward a copy to PPH National.*

Does the Rotary club/district have any other documents relating to the incident (i.e. photos, articles, witness statements) Yes No *If yes, please forward a copy to PPH National.*