

Rotary International District 5040

Expense Claim Policy

Current as of May 2017

The following chart summarises the allowable expenses. These are further described in the remainder of this Section. This document, as revised from time to time, is incorporated into District 5040 Policy.

Travel, lodging and meal expenses are covered for the following activities for District leadership positions:

- DG – District Governor
- DGE – District Governor Elect
- DGN – District Governor Nominee
- DGD – District Governor Designate
- AG – Assistant Governor
- D. Chairs – District Committee Chairs

Blue D - Blue Denim (A Training event for incoming Governor teams from the PETS Districts) PETS - President Elect Training

- D. Ass – District Assembly
- D. Train – District leadership Training
- D. Meet – District leadership Meetings
- D. Conf – District Conference
- I. Conv – International Convention
- Club V. – Club Visits
- Zone I – Zone Institute

Y (+ S) – Yes (plus Spouse)

Expenses covered by Rotary International

Expenses covered by District 5040

Expenses not covered

	DG ²	DGE	DGN	DGD	AG	D. Chairs
Blue D	Y + S	Y + S	Y + S	Y + S	N	N
PETS ³	N	Y	Y	Y	Y	N
D. ASS	Y	Y	Y	Y	Y	Y
D. Train	Y	Y	Y	Y	Y	Y
D. Meet	Y	Y	Y	Y	Y	Y
D. Conf	Y + S	Y + S	N	N	N	N
I. Conv ¹	Y + S	Y + S	N	N	N	N
Club V.	Y	N	N	N	Y (4)	N
Zone I.	Y + S	Y + S	Y + S	N	N	N

*** Notes:**

1. International Convention – District will provide a budget for the DG and DGE to attend the International Convention within their respective years in the position. The DG or DGE may elect to combine the two budgets to cover the cost of attending one International Conference.

2: The RI allocations for DG and DGE cover expenses related to PETS, D. Conf and other District travel activities.

3: Assistant Governors are expected to attend PETS, except in the year in which they are resigning the position.

4. All expenses incurred and being claimed should be done so promptly, but no later than the end of the quarter in which they are incurred. All expenses incurred in the final quarter of the Rotary year must be claimed within 30 days of the end of the Rotary year.

Reasonable and proper expenses incurred in the performance of duties are reimbursed as follows:

Mileage: Mileage will be reimbursed for approved travel. Mileage reimbursement amount will be based on the monthly per km. rate established by RI and accessible from the RI website. Car pooling/Ride share is encouraged wherever possible in order to reduce costs.

Flights/ Vehicle cost claims: If the cost to be reimbursed for mileage is over \$250 then the participant must show that the airfare is more. If the vehicle is then used, then the reimbursement will be the lesser of the mileage or the airfare amount. Proof of the airfare costs versus mileage should be submitted with the expense claim. All flights should be booked as soon as the travel requirements are known to achieve the lowest possible fares.

Lodging: Reimbursable rate will be based on a standard single room at the hotel where the event is held or a similar rate at a nearby hotel. The Hotel Groups within the RI Rewards Program offer Rotarians special discounts. Rotarians are encouraged to book at these hotels where possible. Reasonable rates will be reimbursed. See: **Rotary Global Rewards in My Rotary.**

Accommodation at PETS for AG's is based on shared room rate. Additional costs for a private room to be paid for by the AG.

Meals: Reimbursable only on overnight stays except when you are expected to pay for a meal that occurs on official Rotary business. Meals will be reimbursed at a reasonable cost, and include Gratuity and taxes. Liquor with meals is not a reimbursable cost. The District covers meal costs for the DG spouse when accompanying the DG on Zone, Blue Denim and District Conference.

Administrative costs

- **Telephone, Cellphone, Fax** - at cost for Rotary activities
- **Postage** - at cost; If there is going to be anything other than just a letter or standard package – such as a large mail out – this must first be cleared with the District Governor.
- **Printing** - at cost within the budget set for the committee
- **Photocopy** - at cost within the budget set for the Committee.

Additional Guidelines:

- Spouse/Partner expenses are not normally reimbursed unless attendance is expected and/or requested by the Governor. Chairs/AGs may request prior approval from

the Governor on an individual case basis;

- Participation in club fundraising activities including routine club draws/raffles is an individual choice and is not reimbursable;
- Routine attendance at events of the District or individual clubs is not normally reimbursed. When District Officers, Committee Chairs and/or Members are official participants at an event representing the District or attending in an official capacity, the expense may be reimbursed;
- Meal expenses for Assistant Governors making required club visits are incurred by the visited club;
- The District will not pay expenses for Committee Chairs to attend the adjunct training sessions at the Zone Institutes except for the District Trainer;
- Expenses incurred by the Governor(s) and Assistant Governor(s) will not be applied to a Committee budget without the prior approval of the Committee Chair;
- Assistant Governors will be reimbursed for a maximum of four (4) club visits. One visit will be the official visit of the Governor, one will be a visit prior to the beginning of the Rotary year. Other visits are at the discretion of the Assistant Governor;
- A District Committee may choose to fund some of the expenses when the Governor(s) and Assistant Governor(s) is/are invited to participate.
- All expenses being claimed should be within the Budget submitted and approved for the respective committee or person. Any exceptions must be submitted to the District Treasurer and approved prior to the expense being incurred.

Major expenses, such as flights, can be claimed in advance of the date of the trip.

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PDG Ken Wilson, Chair