

Reimbursable District Expenses - Revised August 2023 – Chart Corrected October 2024

The following chart summarizes the allowable expenses. These are further described in the remainder of this Section. This document, as revised from time to time, is an adjunct to 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 Denim - A Training event for incoming Governor teams from the PETS Districts
- PETS - President Elect Training
- Year Ahead– formerly the District Assembly
- District Training – District leadership Training (ie District Team training, AG Training)
- District Meetings– District leadership Meetings (ie Strategic Planning)

Y (+ S) – Yes (plus Spouse/Companion - See note #6)

Expenses covered by Rotary International

Expenses covered by District 5040

Expenses not covered

	DG Note 2	DGE Note 2	DGN	DGD	AG	D. Chairs
Blue Denim	Y + S	Y + S	Y + S	Y + S	N	N
PETS Note 3	N	Y	Y	Y	Y	N
Year Ahead	Y	Y	Y	Y	Y	N Note 4
District Training	Y	Y	Y	Y	Y	Y
District Meetings	Y	Y	Y	Y	Y	Y
District Conference	Y	Y	N	N	N	N
International Convention Note 1	N	Y + S	N	N	N	N
Club Visits	Y	N	N	N	Y	N
Zone Training Note 5	Y + S	Y + S	Y + S	N	N	N

Notes:

1. International Convention – The District will provide a budget for the DGE and spouse to attend the International Convention in his/her year as DGE to a maximum of \$6000.

2. District travel activities. Expenses for spouses are not covered by the RI allocation.
3. Assistant Governors are expected to attend PETS, except in the year in which they are resigning the position.
4. District Chairs attend the Year Ahead sessions at their own cost unless required to be a speaker/presenter.
5. The DG, DGE and DGN and their spouses are covered to attend the annual Zone Training. The District will cover costs for one member of the DG team as determined each year by the DG team, to attend the western Zone Symposium. Costs for the spouse are not covered for the Symposium. The DG team can consider supporting up to two young Rotarians or Rotaractors to attend the Zone Training as future leaders.
6. The Rotarian serving as DGD, DGN, DGE and DG, may have expenses covered for the partner or companion instead of the spouse. Here are the criteria:
 - eligibility for partner or companion expense reimbursement has been approved by the District 5040 Board of Directors;
 - expenses must not exceed the allowance for a spouse as prescribed in the financial policy;
 - the partner or companion agrees to take an active role in supporting you as governor, including learning opportunities.

It is not a requirement for a person on the governor journey to have the support of a spouse, partner or companion.

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

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. District 5040 Expense Claim form available under Documents Download on the District website.

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. Approval in advance may be given by the DG, DGE or District Chair within budget to cover just the cost of gas not mileage if the individual agrees. Carpooling/Ride share is encouraged wherever possible in order to reduce costs. Expenses for local mileage under 20km one way, are not reimbursable unless approved by the Governor in advance.

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. One hotel night prior to the event start date and one night after the event end date will only be reimbursed if required due to travel arrangements.

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. The District will cover reasonable meal costs at the International convention including the District 5040 dinner. Other optional scheduled special meals at the International Conference, but not including host-sponsored events, may be included within the DG allowance only with the approval of the Finance Committee chair.

Registration Costs Registration fees are covered for the District Conference, International Convention and other Training Events for those District Leaders attending as per the table above.

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 by the District.
- 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 Training unless determined by the DG team to be required in a specific year for a specific position.
- 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. The other two visits are at the discretion of the Assistant Governor. Any additional visits will not be reimbursed unless approved in advance by the DG for a specific purpose.
- A District Committee may choose to fund some of the expenses when the Governor(s) and Assistant Governor(s) is/are invited to participate.
- The District will cover the cost of the return airfare and one night accommodation for the PDG chosen as the COL Representative (every three years) and the Representative on the Directors Nominating Committee (every four years). No costs will be covered for the delegate or their spouse to attend the full Zone Training though it is hoped that the delegate will attend at their own cost.
- 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.
- The District Treasurer shall send a year to date compared to budget report to each District Chair for the second and third quarters in the Rotary year. District Chairs should be sent a copy of the budget.