

ROTARY DISTRICT 7010 EXPENSE POLICIES

August 2019

Last Update 08-12-19

General Expense Procedures:

- Use the expense form available on the District 7010 website.
- Be sure to identify the name of the committee.
- A scanned copy of all receipts must be forwarded with your claim. If you don't have a receipt, provide an explanation. Please retain original receipts in your files.
- For mileage claims, a log showing a minimum of: date, route, and purpose must be provided.
- No expense claims can be made for alcohol.
- Meal expense maximums include tax and tip.
- Hotel expenses are for a "standard" room only. Any upgrades are responsibility of the individual.
- Other than AGs, DG, DGE, DGN and Committee Directors, all expense claims/receipts must be scanned and forward by email (considered your e-signature) to the appropriate Committee Director, for approval and forwarding (email serves as e-signature approval) to the Treasurer who will then forward on to the bookkeeper for payment.
- Expense claims from the AG's, DG, DGE, DGN and Committee Directors can be scanned and submitted directly to the Treasurer for signing and forwarding to the bookkeeper for payment.
- Expenses should be submitted as soon as possible after they have been incurred, and no later than July 15th. Expenses received after July 15th will not be paid.
- At District sponsored events such as DTTS, Rotary Weekend and DAC meetings, members are expected to share accommodation with other members, so 50% of room costs will be reimbursed. If members wish to have a single room, they will only be reimbursed for 50% of the cost.
- Mileage, hotel and meals (if applicable) for Presenters at District sponsored events and meetings will be reimbursed for the days that they are presenting only. For example, if a Presenter only has a single presentation on Sunday morning, they would they be reimbursed accommodations for Saturday evening and breakfast and lunch on the day of the presentation. If they wish to attend the remainder of the meeting it will be at their expense. This will be made clear in emails to presenters at the time of confirming their participation.
- A separate expense form should be used for expenses related to each committee.
- While e-mail is preferred, postal mail and fax are acceptable ways of submitting expense claims.
- There is no expense claim during District Conference. The only exception is if the timing of the DAC requires you to stay an extra night at the hotel. In this case, the district will pay for one night's accommodations.
- Submit expenses to:

Scott Brumwell
Rotary District 7010 Treasurer
46 Osprey Ridge Road
Barrie, Ontario L4M 6P2
sbrumwellrotary@gmail.com

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District Governor:

- Receives \$5,000 honorarium paid on July 1st of Governor year.
- Due to receiving honorarium, cannot submit expense claims to the District except as outlined below:
 - Attendance at Zone Conference:
 - Travel expenses (e.g. airfare, hotel, car rental, bus, parking, medical insurance, trip cancellation insurance, etc.) for DG only. Note: Please see if your credit card will cover any insurance expenses.
 - Registration fees for DG only. (Note: Claim the “Single” rate, even if you register and attend with your partner).
 - Accommodations for the duration of the Zone Conference (including Zone Pre-Conference DG Training).
 - Meals are included in registration fee.
 - The following expenses are covered by RI and/or District honorarium:
 - Travel, hotel and meals at District conference, DTTS and Rotary Weekend.

District Governor-Elect:

- Receives \$3,000 honorarium on July 1st and \$5,000 on January 1st of Governor Elect year.
- Due to receiving honorarium, cannot submit expense claims to the District except as outlined below:
 - Attendance at Zone Preconference (Governor-Elect Training Seminar) and Zone Conference
 - Travel expenses (e.g. airfare, hotel, car rental, bus, parking, medical insurance, trip cancellation insurance, etc.) for DGE and partner. Note: Please see if your credit card will cover any insurance expenses.
 - Registration fees for DGE and partner.
 - Accommodations for the duration of the conference.
 - Meals are included in registration fee.
 - RI pays accommodations and registration during GETS. Therefore, the claim to the District is the portion not covered by RI.
 - Attendance at RI Convention (typically in May or June at end of years DGE):
 - Travel expenses (e.g. airfare, hotel, car rental, bus, parking, medical insurance, trip cancellation insurance, etc.) for DGE and partner. Note: Please see if your credit card will cover any insurance expenses.
 - Convention registration fees for DGE and partner.
 - Accommodation expense for DGE and partner.
 - Meals are included provided it is within the maximum.
 - Maximum claim is \$4,000 if the convention is held in continental North America; or \$6,000 maximum if the convention is held outside of continental North America.
 - As the RI Convention takes place near the end of the Rotary year (i.e. June 30th), be sure to promptly submit your expenses.

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- The following expenses are covered by RI and/or District honorarium:
 - Travel, hotel and meals at Zone Pre-Conference (Governor-Elect Training Seminar (GETS)), District conference, DTTS and Rotary Weekend.
 - Travel, hotel and meals at International Assembly.

District Governor--Nominee:

- Receives \$1,500 honorarium on July 1st of Governor Nominee year.
- Due to receiving honorarium, cannot submit expense claims to the district except as outlined below:
 - Attendance at Zone Pre-Conference (Governor--Nominee Training Seminar) and Zone Conference
 - Travel expenses (e.g. airfare, hotel, car rental, bus, parking, medical insurance, trip cancellation insurance, etc.) for DGN and partner only. Note: Please see if your credit card will cover any insurance expenses.
 - Registration fees for DGN and partner.
 - Accommodation expense for DGN and partner.
- Meals are included in registration fee.
- Must pay for own hotel room at DTTS and Rotary Weekend.

Assistant Governors:

- Follow "General Expense Procedures.
- On the expense form, identify your "Committee" as "AG Area x".
- In an effort to control expenses, try to group trips if possible, in order to reduce mileage expense. Also, consider renting a car for longer trips.
- Try to minimize hotel expenses. Where possible, try to have a club host you, or at least pay your hotel expense this would be for special occasions etc.
- AGs try to do 4 visits a year.

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Membership/Foundation/Trainer Committee Chairs:

- Each year, during the budget process, an amount will be budgeted for attendance at the Zone Conference. Depending on the location, costs and agenda of the conference the number of attendees will be determined.
- The expense rules are:
 - Cannot attend in your last year. Ideally, you should attend in your first year as Committee Chair.
 - Travel expenses (e.g. hotel, car rental, bus, parking, etc.).
 - Zone Conference District Leaders Training registration fee for Committee Chair only.
 - Accommodation expense (one or two nights depending on location) for Committee Chair only.
 - Meals are included in the registration fee.
- Notes:
 - The intention is that a different Committee Chair attend the Zone Conference District Leaders Training each year on a rotating basis.
 - More than one chair may attend depending on the location of the Zone Conference.
 - The selection of attendee(s) for the coming year will be made by the Executive Committee.
 - The Zone Conference also has Rotaract Day program for Rotaract and younger Rotarians. Attendees are selected by the Executive Committee.

Council on Legislation:

- The expenses associated with sending an attendee to the Council on Legislation (every three years) are completely covered by Rotary International and are at no cost to the District.
- However, RI requires that the representative attend the Zone Conference District Leaders Training meeting immediately prior to the Council on Legislation, and District covers the usual Zone expenses for this attendee.
 - Travel expenses (e.g. hotel, car rental, bus, parking, etc.) for COL attendee only.
 - Zone Conference District Leaders Training registration fee for COL attendee only.
 - Accommodation expense (one or two nights depending on location) for COL attendee only.
 - Meals are included in the registration fee.

Youth Exchange Committee:

- A member of the Youth Exchange Committee can attend the “Youth Exchange Officers Preconvention Meeting” at RI Convention every three years. The expense rules are as follows:
 - Cannot attend in your last year on the committee.
 - Preconvention registration fee for Committee Member only.
 - Accommodation expense (1 night) for Committee Member only.
 - Travel costs to RI Convention will not be reimbursed.