

## ROTARY DISTRICT 7010 EXPENSE POLICY

August 29, 2018

### **General Expense Policy:**

- 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 individual.
- Other than AGs, DG, DGE, and DGN, 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 close to June 30<sup>th</sup> as possible, and no later than July 15<sup>th</sup>.
- At district sponsored events such as DTTS and Rotary Weekend (aka PETS), 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.
- A separate expense form should be used for expenses related to each committee.
- Postal mail, e-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](mailto:sbrumwellrotary@gmail.com)

### **Assistant Governors:**

- Follow "General Expense Policy".
- On the expense form, identify your "Committee" as "AG Area x".
- No committee chair is required to sign the expense form as it will be signed by the Treasurer.
- In an effort to control expenses, visit clubs as required, but not more than necessary.
- 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.

## ROTARY DISTRICT 7010 EXPENSE POLICY

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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 Institute – “Program for District Governors”:
    - 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 five nights (e.g. Tuesday evening until Sunday morning)
    - Meals are not included (included in registration fee).
- Must pay for own hotel room at DTTS and Rotary Weekend (PETS).
- Note: In general, as the DG represents the office of the RI President, the DG and partner should be treated as a guest at all district events (e.g. Foundation dinner, Rotary Weekend, etc.) and not be charged for meals. However, it is understood that this may not always be practical and some flexibility is required.

## ROTARY DISTRICT 7010 EXPENSE POLICY

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### District Governor-Elect:

- Receives \$3,000 honorarium on July 1<sup>st</sup> and \$5,000 on January 1<sup>st</sup> of Governor Elect year.
- Due to receiving honorarium, cannot submit expense claims to the district except as outlined below:
  - Attendance at GETS (Governor-Elect Training Seminar) and Zone Institute:
    - 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 three nights during the Zone Institute (Thursday, Friday, and Saturday).
    - Meals are not included.
    - RI pays accommodations and meals during GETS.
  - Attendance at RI Convention (typically in May or June at end of year as 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 not included.
    - Maximum claim is \$4,000 if the convention is held in North America; or \$6,000 maximum if the convention is held outside of North America.
    - As the RI Convention takes place near the end of the Rotary year (i.e. June 30<sup>th</sup>), be sure to promptly submit your expenses.
  - Can claim up to \$2,000 for RI “Theme Supplies”.
  - While the DGE also attends the International Assembly, this is paid by RI and there is no cost to the district.
- Must pay for own hotel room at DTTS and Rotary Weekend.

## ROTARY DISTRICT 7010 EXPENSE POLICY

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### **District Governor--Nominee:**

- Receives \$1,500 honorarium on July 1<sup>st</sup> of Governor Nominee year.
- Due to receiving honorarium, cannot submit expense claims to the district except as outlined below:
  - Attendance at Zone GNTS (Governor--Nominee Training Seminar) and Zone Institute:
    - Travel expenses (e.g. airfare, hotel, car rental, bus, parking, medical insurance, trip cancellation insurance, etc.) for DGN only. Note: Please see if your credit card will cover any insurance expenses.
    - Registration fees for DGN only.
    - Accommodations for five nights (Tuesday through Saturday evenings).
    - Meals are not included.
- Must pay for own hotel room at DTTS and Rotary Weekend.

### **Membership/Foundation/Trainer Committee Chairs:**

- \$1,700 is set aside each year into the Training Reserve account (#3120) on the basis that one of the above committee chairs can attend the Zone Institute for training. 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.) for Committee Chair only
  - Zone Institute registration fee for Committee Chair only.
  - Accommodation expense (2 nights) for Committee Chair only.
  - Meals are not included.
  - Maximum claim is \$1,700.
- Note: While the intention is that a different Committee Chair attend the Zone Institute each year on a rotating basis, it may make sense to send more than one chair when the Zone Institute is close to home, and not send anyone when the Zone Institute is far away. This may help reduce costs. For this reason, the \$1,700 per year amount “accumulates” in the Training Reserve account (#3120). The selection of attendee(s) for the coming year will be made at the final DAC meeting of the current year (usually April).

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### **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.

### **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 no cost to the district.
- However, RI requires that the representative attend the Zone 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 Institute registration fee for COL attendee only.
  - Accommodation expense (2 nights) for COL attendee only.
  - Meals are not included.
  - Maximum claim is \$1,700.