

Rotary District 7670
Expense Reimbursement Guidelines (Adopted 1 July 2023)

The District will provide funding for Rotarian's expenses within the limits of the District Budget. Generally, the District will reimburse Rotarians serving on behalf of the District Governor and District operations (such as foundation, membership, event preparation). For reimbursement, Rotarians will submit the District Reimbursement Request (attached) along with copies of bills and receipts no later than 30 days after the event, but no later than **June 30th**.

To the extent possible, District Committee Chairs and Council members will include anticipated reimbursement expenses to the Finance Committee Chair and the DGE during the budget preparation process each year. Expenses not in the budget must be approved **BEFORE** expense is incurred. Final decision on reimbursement issues will be by the District Governor with advice from the Finance Committee.

Any approved travel reimbursement for the vehicle owner will be at one half (1/2) the rate established by the Internal Revenue Service (IRS). Carpooling is encouraged.

Some **EXAMPLES** of possible reimbursable expenses for Rotarians working on District business include:

PETS: The District will reimburse the following (60440):

- The Registration, lodging, meals package, and travel for DGND
- The Registration, lodging, meals package, and travel for the District Trainer including Thursday for set up if required.
- The Registration, lodging, meals package, and travel for Assistant Governors. A shared room is encouraged.
- Reimbursement for Thursday requires attending training sessions.
- DGE & DGN are covered by Carolinas PETS.

GETS Institute: The District will reimburse the following (60460):

GETS Registration, lodging, meals, and travel for the DGN. The DGE is partially reimbursed by RI consequently the District will provide advance payment in the amount of the expected reimbursement; RI pays no spousal costs. The District will reimburse the DG, DGE, and DGN costs associated

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with class hospitality and class dinners.

Zone InSTITUTE: The District will reimburse the following:

- Registration, lodging, meals, and travel for the DG, DGE, DGN ~~and spouses~~ (60460). District will equally reimburse PDGs, with District roles, not to exceed the budgeted amount (60470) for all PDGs. District will equally reimburse up to three Emerging Leaders, which are selected by the DG chain, not to exceed the budgeted amount (60480) for all Emerging Leaders.

Zone 33 Training: The District will reimburse the following (60481):

- Registration, lodging, meals, and travel for ZONE 33 Training including DG, DGE, DGN, DGND, Foundation Chair/designee, Membership Chair/designee, and the Public Image Chair/designee.

District Leadership Assembly: The District will reimburse the following: (60430):

- Facility and registration fees, if applicable, of district training for DG, DGE, DGN, DGND, District Secretary, Trainer, Assistant Governors, affected District Committee chairs and members when District Governor requires their attendance. Examples include: the Foundation, DCO, Membership, Public Image, DEI, and Youth Chairs. Grants seminar facility fees and expenses will be reimbursed (60410) assuming funds are available, otherwise under District Leadership Assembly (60430).

District Membership/Public Image Summit: The District will reimburse the following: (60113):

- Facility and registration fees, if applicable, of DG/designee, Membership, and Public Image Chairs.

Youth Services: The District will reimburse the following:

- Youth Exchange: Registration, lodging, meals, and travel for YE Chair, Inbound Chair, Outbound Chair, Short-term Exchange Program Chair, and one of the District Governor chain attendances at Ohio-Erie sponsored events. The District Governor may approve additional attendance for training and experience purposes.

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- Youth Events: Registration and travel, if applicable, for Youth Services Chair, Interact Chair, RYLA Chair, and one from the District Governor chain attendance at District sponsored youth events. The District Governor may approve additional attendance for training and experience purposes.

Some examples of expenses normally **ineligible** for reimbursement include:

- Expenses not included in the District Budget or approved by the District Governor prior to the event and any expenses reimbursed directly by RI.
- Alcohol or personal items.
- Expenses of a spouse/partner when attendance is not required or not participating in the event.
- Purchase of normal office items such as software and its support, telephone access, internet access, office equipment, telephones, computers, camera, scanner or the repair of such items. This does not apply to District administrative costs which are covered in the District Budget.
- Non-Rotarian volunteers' expense unless approved in advance by the District Governor.
- District Conference attendees with the exception of the Event Planner (Rotarian) and DG, which would include registration and lodging.