



# Directions for Completing the Reimbursable Activities of Spouse Form

Rotary will fund a spouse's travel expenses only if the travel serves a bona fide business purpose for Rotary and the amounts requested for reimbursement are substantiated by utilizing an RI [Reimbursable Activities of Spouse Form](#). Rotarians and spouses who fail to fulfill these requirements shall not be reimbursed by RI for any expenses associated with the travel and shall return to RI all amounts paid to them or on their behalf to RI in connection with the travel. Travelers may be subject to income taxes on amounts paid by RI for travel which does not have a bona fide business purpose. The requirement for a bona fide business purpose may be met by the spouse's participation in the official activities of the meeting, including attendance at any and all plenary sessions and any spouses' meetings. Please use this form to document all activities your spouse participated in at the RI event. Please complete this form with as much detail as possible to document the bona fide business purpose of spouse expenses. This form is designed to protect Rotarians and Rotary International from the possible imposition of tax penalties. Please note that performing incidental services such as clerical duties are not sufficient to substantiate spouse travel expenses.

## Directions for completing this form:

Note: This form may be completed by either the Rotarian or your spouse, but both individuals must sign the form.

1. **Spouse name** – Print the name of your spouse.
2. **Rotarian name** – Print the name of the Rotarian.
3. **Name of the meeting/event** – Provide the official name of the meeting/event or short description.
4. **Location** – Provide the city/country where the meeting/event was held.
5. **Date(s) of official RI event** – Provide the dates of the meeting/event.
6. **Check the appropriate box and provide additional information related to the activities completed by the spouse.**
  - a. **Attended plenary sessions** – Check the box if your spouse attended any plenary sessions and follow the directions below:
    - i. Enter the number of plenary sessions your spouse attended and the total number that were offered.
    - ii. Enter the approximate total number of minutes your spouse spent in the plenary sessions.
    - iii. If your spouse did NOT attend all of the plenary sessions explain why in the space provided.
  - b. **Attended spouses' meetings** – Check the box if your spouse attended any spouse meetings and follow the directions below:
    - i. Enter the number of spouse meetings your spouse attended and the total number that were offered.
    - ii. Enter the approximate total number of minutes your spouse spent in all of the spouse meetings.
    - iii. If your spouse did NOT attend all of the spouse meetings offered explain why in the space provided.
  - c. **Met with Rotarians and their spouses** – Check the box if your spouse met with any Rotarians and their spouses and enter the details of the meeting in the box provided.
  - d. **Provided information on Rotary programs** – Check the box if your spouse provided information on Rotary programs and enter details of the meeting in the box provided.
  - e. **Made formal presentations(s)** – Check the box if your spouse made any formal presentations.
    - i. Enter the approximate total number of minutes your spouse spent making the presentation.
    - ii. Describe the presentation in the box provided.
  - f. **Attended other meetings** – Check the box if your spouse attended any other Rotary-related meetings and enter details of the meeting in the box provided.
  - g. **Visited Rotary clubs or service projects** – Check the box if your spouse visited any Rotary clubs or service projects and enter details of the visits in the box provided.
  - h. **Participated in fundraising activities** – Check the box if your spouse participated in any fundraising activities and enter details of the activities in the box provided.
  - i. **Met with media representatives** – Check the box if your spouse met with media representatives and enter details of the meeting in the box provided.
  - j. **Visited with government officials/other dignitaries** – Check the box if your spouse met with government officials or other dignitaries and enter details of the meeting in the box provided.
  - k. **Participated in any other Rotary activities** – Check the box if your spouse participated in any other Rotary activities, and enter the details of the activities in the box provided.

7. **Spouse signature/Date** – Your spouse must sign and date these fields. By signing this form, your spouse is attesting that all information provided is accurate.
8. **Rotarian signature/Date** – The Rotarian must sign and date these fields. By signing this form, the Rotarian is attesting that all of the information provided is accurate.
9. After the form has been completed, attach it to the expense statement and submit it to the appropriate staff liaison. (Note: If an expense statement requesting reimbursement will not be submitted, but airfare was paid for by either RI or TRF for your spouse, submit the completed spouse activities form to the appropriate staff liaison.)
10. **Staff review/Approval/Date** – For internal use only – This field will be signed by the appropriate Rotary staff liaison to approve that your spouse has reasonably and adequately fulfilled/performed the role assigned to him or her.