

**ROTARY INTERNATIONAL
VOLUNTEER TRAVEL AND EXPENSE REPORTING POLICY
JUNE 2007**

PURPOSE

The mission of the Rotary International Travel Service (RITS) is to provide safe, cost-effective travel services to Rotary funded travelers.

GENERAL POLICIES

1. Travelers are expected to follow travel policy guidelines which are designed to conserve the funds of the organization while providing reasonable comfort and meeting the travelers basic needs. Regardless of the class of service entitlement, travel arrangements will be made in the lowest cost option of the entitled class of service. Travel products are selected based on the lowest cost option with a preference toward preferred suppliers provided they offer the lowest cost.
2. Only properly authorized travel expenses in the service of Rotary International or its Foundation will be paid for or reimbursed. Non-funded travel arrangements are the responsibility of the individual traveler.
3. All funded travelers must submit a travel request form to the appropriate RITS designated agency.
4. Travelers will use preferred airlines that provide discounts to Rotary International and its Foundation.
5. Persons traveling at the expense of Rotary International or its Foundation may secure their own travel medical and accident insurance at their own personal cost. Rotary senior leaders (Board Members, Foundation Trustees and past Board Members and past Foundation Trustees) traveling on Rotary business, committee, task force or resource group members traveling on funded Rotary business, and past senior leaders traveling at the request of the president or the trustee chairman are provided travel insurance by Rotary International.
6. Travelers will accept flights with up to one additional connection if considerable cost savings can be achieved.
7. Flights will be booked through the most economical airports provided the cost of ground transportation does not increase the total cost of travel nor substantially increase traveling time to and from the airports.
8. All travel arrangements funded by Rotary International and its Foundation are to be handled by the appropriate RITS-designated travel agency. Travelers are encouraged to submit requests for local purchase authorization if they believe they can purchase a lower cost airfare through a non RITS-designated travel agency. The local purchase authorization request must include an official travel itinerary, which indicates flight numbers, flight times, airline and total cost. The traveler will only be authorized for local purchase if the airfare provided by the non RITS-designated agency is at least US\$100.00 lower than the RITS airfare. RITS reserves the right to deny local purchase requests based on its evaluation of the routing, seat availability, and airline selected by the non-RITS agency. The traveler will be reimbursed for the authorized amount upon completion of the trip and submission of the applicable receipts, along with an official Rotary International Expense Statement.

9. Travelers arriving for official meetings may arrive one day prior to the first meeting date. Travelers arriving from destinations 4000km. (2500 miles) and further may arrive two days prior to the first meeting date if their RITS scheduled flight cannot arrive before 15:00 hours the day before the meeting is scheduled to begin. Committee chairmen may arrive two days prior to the first meeting date. Past Presidents traveling more than 4000km. (2500 miles) may arrive one day prior to the general arriving date for the Council on Legislation, International Assembly and International Convention, unless they are otherwise required to arrive earlier in respect of any other meeting. Lodging, meal and general expense costs of travelers arriving within these timeframes will be the responsibility of Rotary International. Travelers arriving earlier than these guidelines or staying longer than the night of their last meeting will do so at their own expense. If a committee meeting ends on Friday and there is considerable saving on airfares by staying over Saturday, the Saturday night lodging, meal and general expense costs will be paid by Rotary International. The same rule would apply to a Saturday arrival for meetings beginning on Monday. (This does not apply to travel to the International Assembly, International Convention, and Council on Legislation as travel policy may be modified to best meet the objectives of those meeting.)
10. Travel by transportation other than commercial aircraft must be authorized and will be reimbursed provided the cost does not exceed the amount of a RITS calculated round-trip airfare.
11. If air service is unavailable, travelers will be reimbursed for the cost of the Rotary-authorized most economical alternate form of transportation (i.e. personal automobile, train, bus, ferry). If anticipated travel costs exceed US\$250, RITS authorization is required.
12. Authorized travel by personal automobile will be reimbursed for the actual distance driven, on a per mile/kilometer basis as predetermined annually by Rotary International on a country-by-country basis. This mileage rate accounts for fuel costs; therefore, fuel may not be expensed in addition to the mileage.
13. Approved travel by rental car will be authorized for intermediate or smaller size cars. Rotary will not reimburse Collision Damage Waiver or Personal Accident Insurance on rental cars.
14. Travelers will receive reimbursement in an amount up to the class of service for which they are eligible.
15. Travelers will pay the cost of any personal travel booked in conjunction with authorized Rotary International travel.
16. Frequent flyer miles earned through tickets purchased by Rotary International will be credited to the account(s) of the individual traveler. Free tickets obtained by using frequent flyer miles are not reimbursable.
17. Exceptions to travel policy may be applied for in writing to the General Secretary. Examples of exceptions that may not be applied for include:
 - a. The selection of specific airlines for frequent flyer benefits where Rotary has the opportunity to take advantage of lower fare or fulfill its contractual commitments with its preferred airlines;
 - b. The selection of full economy/coach class fares (for the benefit of personal first or business class upgrades), where lower discount fares may be available; noting no change

to the current travel policy for those entitled to business class where business class is not available.

AIRLINE CLASS OF SERVICE

Funded Travelers will make use of the lowest available economy class airfare.

Guest Speakers and Award Recipients traveling at the expense of either Rotary International or its Foundation will travel at a class of service as authorized by the President of Rotary International or the Chairman of The Rotary Foundation Trustees, as appropriate.

Rotary Senior Leaders may make use of upgrades to the class of service for which they are eligible and may always elect to travel at a less expensive class of service.

It is strongly recommended that Rotary Senior Leaders use coach class for all flights up to two hours in length and make use of upgrades on those flights to fly in either business class or first class. When doing so, Rotary Senior Leaders are to be reimbursed for the cost of upgrade coupons with those charges billed to airfare cost centers.

Note: Reimbursement is limited to eligible class of service as indicated below.

Business Class

- Rotary International Board of Directors
- Rotary Foundation Trustees
- President-nominee
- Past Presidents
- General Secretary
- Directors-elect in conjunction with the Rotary International Convention and subsequent Board meetings
- Incoming Trustees in conjunction with their preparation as a Trustee
- Aides to the President and President-elect
- Past Directors and Past Trustees on flights longer than two hours
- Spouses of the above when traveling with them at Rotary's expense

First Class

- President
- President-elect
- Past Presidents when business class is not offered
- Rotary Foundation Trustee Chairman
- Current Directors, Trustees and General Secretary when business class is not offered
- Spouses of the above when traveling with them at Rotary's expense

REIMBURSEMENT FOR TRAVEL EXPENSES

1. All requests for reimbursement of business expenses shall be submitted on a RI expense statement within 60 days of when the expenses were incurred. Expense statements received after 60 days will not be reimbursed unless authorized by the general secretary in exceptional cases where circumstances warrant such action.
2. Travelers on Rotary International and its Foundation business are to submit receipts for all expenses equal to or over US\$75.00
3. If international travel connection time exceeds 7 daytime hours, Rotary will reimburse the traveler for the cost of a day room, based on actual receipts, provided that the room is booked by RITS.
4. If international schedules require a forced overnight stay, Rotary will reimburse the actual hotel costs of a reasonably priced hotel room provided that it is booked by RITS.
5. Reimbursement to travelers for locally purchased airline tickets authorized by RITS is to be processed upon submission of applicable receipts on an official Rotary International Expense Statement to the Finance Department or to the appropriate Rotary International Office or Fiscal Agent. The submission of the required documentation may not occur prior to the commencement of travel.
6. Rotary will reimburse Rotary spouse travel expenses incurred for a bona fide business purpose for Rotary International. Amounts requested for spouse expense reimbursement must be substantiated with appropriate documentation and by utilizing an RI "Document of Reimbursable Activities of Spouse" before they can be reimbursed through the appropriate cost center. For spouses accompanying Rotarians on multiple travel segments, spouse travel expenses will only be eligible for reimbursement if the spouse incurred those expenses while conducting official Rotary business on approved and funded Rotary assignments. These expenses will be billed to the cost center authorizing the spouse travel. Any additional costs for spouses accompanying Rotarians on multiple travel assignments beyond the spouse funded portion will be at the personal expense of the Rotarian.
7. All reasonable expenses such as taxi fare, hotel shuttle buses, and parking fees will be reimbursed.
8. The actual costs of moderately priced, standard hotel rooms and car rentals will be reimbursed at a cost level appropriate to the area, provided that they are booked by Rotary.
9. The actual costs of meals will be reimbursed. If attendance at a hosted official meeting function is mandatory, Rotary International will not reimburse for the costs of any alternate food or beverage.
10. Telephone, laundry and valet: reasonable telephone, laundry, dry cleaning, and/or valet expenses incurred while on RI business are reimbursable.
11. Tickets issued by RITS provide limited accident and baggage insurance. The cost of additional insurance coverage is the responsibility of the traveler and will not be reimbursed by Rotary International.
12. For all individuals traveling at RI expense, the General Secretary shall limit the use of master account billing procedures to the costs of the hotel room and tax only. All other business expenses will be reimbursed according to the standard reimbursement procedures.