

Heart of America – Rotary Leadership Institute

Procedures for District Coordinators Managing RLI Sessions

The following procedures have been adopted to help RLI District Coordinators manage RLI session registration, account for session Income/Expenses, and request expense reimbursement:

Session Registration:

- Coordinators are responsible for listing RLI Sessions and dates on the HOA-RLI Website (www.hoa-rli.com). Coordinators should contact Eric Lewis, Site Webmaster, at Eric@rotarywebservices.com to obtain a password and data entry instructions.

Session Income:

- Payment of RLI registration fees are usually made on the website by credit card at the time of registration. As an alternative, checks may be sent directly to the Coordinator or may be collected on the morning of the session. Checks should be made out to “HOA-RLI.”
- Coordinators may use their discretion to charge walk-in attendees a higher registration fee, and last minute cancellations may incur charges for the meals that would have already been ordered.

Session Expenses:

- HOA-RLI Treasurer shall reimburse coordinators for:
 - Faculty dinner held on the evening preceding the session to plan and coordinate the session. RI guidelines for the dinner apply; alcoholic drinks are not reimbursable.
 - Rental of the venue and meals served during the session.
 - Out-of-Pocket expenses for material and supplies for the session
- RLI Sessions are normally lead by facilitators from within the district. These facilitators are not reimbursed for their travel or lodging expenses.
- RLI facilitators from outside a district in which the session is being held, are reimbursed for their reasonable expenses for mileage and lodging in accordance with R.I. policy. The Expense Reimbursement Form can be found on the HOA-RLI website under the RLI Administration/Forms tab, and must be approved by the District Coordinator.
- Student and Faculty Manuals and other class materials should be ordered through use of the Material Order Form. This form is available on the HOA-RLI website under the RLI Administration/Forms tab. Manuals and other class materials MUST be ordered six business days prior to the event (on Friday a week before the session) to allow sufficient time for printing and normal shipping. Invoices for these items are forwarded by the vendor directly to the Treasurer. Coordinators should keep a small quantity of binders and manuals on hand to cover walk-in students.
- Individuals shall apply for reimbursement of eligible expenses by completing the Expense Reimbursement Form. Forms shall be collected and approved by the District Coordinator.

Expense Reimbursement Form:

- Coordinators shall collect, approve and forward all Expense Reimbursement Forms along with registration fees received, as one set, to the HOA-RLI Treasurer. Treasurer’s address may be found on the Expense Reimbursement Form.
- The Treasurer shall promptly reimburse all appropriate session expenses directly to payees submitting an Expense Reimbursement Form.