



# Administrative Procedure: Travel Expenses

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## 1.0 Travel Expenses

- 1.1 Employees and Trustees who are required to travel in the performance of their duties, will be reimbursed on the basis of distance traveled. Prior written approval from the Director of Education or designate is required for travel and meal reimbursement. For employees who spend significant time on the road, this approval could be included in their employment contract or in a separate document that outlines their travel requirements and respective meal expense needs.
- 1.2 Travel for attendance at regularly scheduled meetings (eg. Board Meetings, Catholic Leadership Learning Forums, Health and Safety Inspections), is deemed pre-approved and does not require prior written approval from the Director of Education or designate.
- 1.3 The positions of Director of Education and Executive Team, require travel as part of work demands and such travel shall be deemed pre-approved and does not require prior written approval from the Director of Education or designate. Employees who report to an executive team member will require prior approval for travel.
- 1.4 Generally, travel to meetings and other Board related travel within the jurisdiction of the Board is deemed to be authorized for Principals. Travel outside the

- jurisdiction of the Board must be authorized by the appropriate Superintendent.
- 1.5 Kilometric charts are established for use by personnel and will be the basis of determining reimbursement for travel in accordance with measured distances, within the boundaries of the system.
  - 1.6 Travel outside the district, except to, Sault Ste. Marie or Sudbury, will usually be by airplane or train. Where it is more practicable to use a private vehicle, the per kilometer reimbursement may apply up to 5000 kilometers and up to a maximum of the equivalent airfare up to a maximum of \$1000.00.
  - 1.7 For the purpose of conference/seminar/meeting attendance, the most economical mode of transportation will be used. Teleconferences, video conferences, web seminars or other technology should be considered before making any Board travel arrangements to determine if there is an opportunity for cost savings.
  - 1.8 The rate of reimbursement for costs incurred on Board travel will be determined at least once every three years. The Board will be guided by the per kilometer rate established by the Canadian Revenue Agency, the Ontario Public Service (OPS) Expenses Directive, Canadian Automobile Association, and other School Boards.
  - 1.9 Preference will be given to travel services and accommodation that provide specially negotiated rates (ie. government rate).
  - 1.10 The cost of reasonable lodging will be allowed, with itemized receipts to be attached to the expense account.
  - 1.11 In lieu of incurring authorized expenses for single accommodation in a standard room, a maximum of \$30 per night is allowed for accommodation, including any meals for private stays with family or friends at a location other than the claimant's principal residence. Instead of a receipt, a written explanation must be submitted identifying the host and the number of days of the stay. The \$30 value may be given in the form of a small gift (which must be accompanied by a receipt) or by cash or cheque.
  - 1.12 Cost of meals, plus tips up to a maximum of 15%, and/or reasonable grocery food items and incidental expenses will be reimbursed up to a maximum of \$60.00 per day inclusive of gratuity for events within the boundaries of the Board. Employees traveling outside the boundaries of the board are reimbursed up to the **per diem** rate. Receipts are not required for reimbursement of travel meals

using the **per diem** rates of the board. A maximum of \$80.00 per day inclusive of gratuity will be reimbursed. The maximum reimbursement calculated per reimbursable meal will be as follows:

Type of Meal	Within Board Boundaries	Per Diem Outside of Board Boundaries
Breakfast	\$15	\$15
Lunch	\$20	\$25
Supper	\$30	\$40
<b>Total</b>	<b>\$65</b>	<b>\$80</b>

- 1.13 **If you are charging your meals to a SNCDSB credit card, you cannot claim per diems. Costs for alcoholic beverages will not be reimbursed.**
- 1.14 Reasonable gratuities for meals, taxis, hotel room services, and porters may be incurred. Examples of reasonable amounts for gratuities are:
  - 1.14.1 **15% on a restaurant meal**
  - 1.14.2 **15% on a taxi fare**
  - 1.14.3 **\$5 for housekeeping for up to two nights in a hotel, up to \$10 for a longer stay**
  - 1.14.4 **\$2-\$5 per bag for a porter**
- 1.15 Reimbursement for meals after the venue ends is dependent upon when an employee can return to his/her community in a reasonable amount of time.
- 1.16 If travel is within the boundaries of the board and a breakfast, lunch or dinner is provided by the venue, then no reimbursement shall be given for that specific meal. Special allowances and arrangements will be made for those with allergies. The onus is on the person with the allergy, to notify the Board regarding specific diet needs and arrangements needed.
- 1.17 Some travel is subject to reimbursement from the Ministry of Education or other agencies. Adherence to specific terms including submitting original itemized

receipts is expected. Where original receipts are not available because they have been submitted to the Ministry of Education or other funding agency, photocopies of receipts will be accepted at the discretion of the approver. The Board will inform people, prior to travel, when they are travelling for Ministry of Education events or with other agencies and provide the specific terms for reimbursement.

- 1.18 Actual expenses in excess of the approved per meal amount will be considered for reimbursement by the approver, if supported by actual itemized receipts and the amount is not deemed excessive, nor inappropriate. Costs for alcoholic beverages will not be reimbursed and preferably on a separate receipt.
- 1.19 The Director of Education, or designate, is authorized to approve, at his/her discretion, any expenses which because of special circumstances, exceeds the amount which would normally be paid. In the case of expenses of the Director of Education, approval needs to be obtained by the Chair of the Board, at his/her discretion.
- 1.20 Any claims as a result of inclement weather or road closure when travelling for Board business will be approved, but employees must endeavor to make the request to their supervisor as soon as they become aware of the need.
- 1.21 Travel expenses charged to a Board credit card are subject to the same restrictions within this policy. For actual expenses in excess of limits in this policy, the employee may be asked to reimburse the Board for the excess.
- 1.22 Employees shall not use a Board-issued credit card to pay for gasoline (except for a Board owned vehicle and at the discretion of the Director), repairs or other costs related to the use of a personal car. The Board will not reimburse fines for traffic and parking violations.
- 1.23 Hospitality is the provision of food, beverage, accommodation, transportation and other amenities paid out of public funds.
- 1.24 Hospitality may be extended in an economical and consistent manner when it can facilitate the Board's business; and when it is considered desirable as a matter of courtesy or protocol.
- 1.25 Acceptable hospitality events may include, but are not limited to, school openings, closings, milestone anniversaries, graduation ceremonies, and honouring distinguished people.

- 1.26 Prior written approval from the Director of Education is required for any hospitality events. Hospitality may include the consumption of alcohol at a meal or reception, but only when there is a business case stating the need. When alcohol is approved as part of hospitality, preference should be given to wine, beer and spirits produced in Ontario.
- 1.27 Social functions (eg. office social events, retirement parties and holiday lunches) are not considered hospitality functions and cannot be reimbursed.
- 1.28 Reasonable provision of food, beverage and other amenities for formal business meetings will be allowed and/or reimbursed. (Reason for meeting, agenda, and individuals who attended must be attached to the receipts).
- 1.29 Staff and Trustees may be required to incur higher travel costs associated with various meetings and professional development. A cash advance may be requested in such situations with an appropriate level of approval. Such requests are to be kept to a minimum. A travel expense claim along with original itemized receipts should be submitted in a timely manner after completion of the travel.
- 1.30 Upon completion of travel, a detailed expense account on the prescribed form is to be submitted to the Board Office, monthly.
- 1.31 The Principal will approve the expense form for school staff members, after it complies with this administrative regulation and then submit it to the Board Office for payment.
- 1.32 The Board will reimburse employees within 1 month of their expense form being submitted.
- 1.33 Employees are encouraged to submit all expenses claims within 4 weeks of them being incurred. Expense claims may not be reimbursed for expenses submitted more than 2 months from the date they were incurred. No claims will be accepted after June 30 for expenses incurred during the school year unless prior approval was given by the immediate supervisor.
- 1.34 Every reasonable effort is to be made to keep costs to a minimum.
- 1.35 Employees shall carpool (minimum of 3 per vehicle), including picking up another employee/participant along the way, if at all possible. However, if there are special circumstances employees may request to their supervisor approval to

travel in a smaller group. This request must be made prior to the employee travelling and when possible at least 2 days in advance of travel.

- 1.36 Appropriate approvals of the expenses are obtained from a higher ranking employee as follows:
  - 1.36.1 In the case of school employees, the Principal and School Superintendent of the Board.
  - 1.36.2 In the case of Catholic Education Centre employees, their immediate supervisor.
  - 1.36.3 In the case of Principals, the Superintendent of the Board.
  - 1.36.4 In the case of Superintendents, the Director of Education.
  - 1.36.5 In the case of the Director of Education, the Chair of the Board.
  - 1.36.6 In the case of Trustees, the Chair of the Board or the Director at the direction of the Chair of the Board.
  - 1.36.7 In the case of the Chair of the Board, the Supervising Manager of Finance.
  - 1.36.8 A periodic review and/or audit of expenditures, at the request of the Director of Education or Chair of the Board, will be undertaken to monitor the adherence to the policy.

## 2.0 Consultants And Contractors

- 2.1 A Consultant means a person or entity that under an agreement, other than an employment agreement, provides expert or strategic and related services for consideration and decision making.
- 2.2 A Contractor means a person or entity who provides goods or services under the terms specified in a contract.
- 2.3 Consultants and contractors can claim and be reimbursed for allowable expenses only when the contract specifically provides for it.

