



Policy

Travel, Business and Mileage Expense Policy POL.COR.18.05

Policy Type: Corporate Policy (Approved by Council)
Date Approved: July 9, 2018
Department: Administration
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Policy Statement

To establish rules and procedures with respect to authorized conferences, seminars and meetings. Travel, business and local mileage expenditures are to be based on sound judgment and proper regard for economy.

Purpose

The purpose of this policy is to address the methods and procedures by which staff of the Town of The Blue Mountains (the Town) will be governed when attending to business related to the Town. This includes attending meetings, conferences, conventions and seminars either within the Town limits or beyond and provides for those expenses for which reimbursement will be paid.

Application

This policy applies to all staff members of the Town.

Definitions

None

Procedures

1. Professional Development Attendance (Subject to budget funding):

Each Department Head may attend up to three municipal professional development conferences or seminars which are relevant to his/her employment with the Town. Provided that if any such conference or seminar is held in a location outside of Canada attendance shall

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first be specially approved by the Chief Administrative Officer (CAO). Any professional development and expenses of the CAO will be approved by the Mayor.

Other staff may be delegated to attend a municipal conference or seminar which is relevant to his/her employment with the Town. Provided that if any such conference or seminar is held in a location outside of the province, attendance shall first be specially approved by the Department Head. If the attendance is outside of Canada then it shall be approved by the CAO. Travel outside of North America will not be considered for approval. Staff members requesting out of province and out of Country conferences or seminars will provide their Director/CAO with an estimate of the total cost for approval prior to registering.

The expenses allowable for each such attendance shall include the registration fee, hotel accommodation, miscellaneous expenses, transportation and meals.

Travel time to and from seminars and conferences outside of the staff members regularly scheduled work day is not considered paid work time.

Final accounting of expenditures including receipts related to this policy shall be submitted to the Finance department no later than thirty (30) working days upon return excluding P-Cards.

Government rates shall be obtained for all purchases when applicable.

2. Purchasing:

All staff who are issued Town Purchasing Cards (P-cards) shall use the Town P-card for all purchases related to travel and business expenses. Please refer to the P-card policy for further detail regarding allowable purchases. Original receipts shall be retained for P-card reconciliation. Staff who do not have a Town issued P-card will be reimbursed for all allowable expenses by submitting a detailed expense report to the Finance Department.

3. Accommodation:

Only accommodation not included as part of registration at a conference or course is to be submitted, limited to the number of days of the event. Department Head approval must be approved for any overnight accommodations.

Staff are expected to research and find hotel accommodation that is the best rate for the local area. The attendee will be reimbursed for the conference or seminar rate for the hotel for the night prior to the start of the conference or seminar and for each night following, excluding the night of the last day of the conference or seminar. Only if the conference is out of province or out of country will consideration of including the night of the last day of the conference or seminar be granted.

4. Transportation:

The most economical class of transportation must be determined, documented and used. This includes car-pooling, rental car, Town vehicles, airplanes, train or what is reasonably available. Where more than one staff member is travelling to the same conference or training, the Town expects staff to car-pool. Staff who submit multiple requests for mileage who have travelled to the same conference will not be reimbursed unless extenuating circumstances have led to the inability to car-pool. An example of an extenuating circumstance would be that the individual is required to stay at the conference longer than other Town delegates.

Air or train travel is an accepted method of travel, except where the use of a car is more practical or economical.

In the case of airfares, the Town will only approve purchase of tickets at economy class level. Seat upgrades will be considered a personal purchase and shall not be submitted as an expense. Airfare will only be considered when the rate of mileage exceeds the cost of airfare or the amount of time to travel by car is not efficient.

The Town recommends the purchase of trip cancellation insurance for travel via rail or air.

The use of taxis should be confined to short trips in situations where it is not suitable, safe or reasonable to use local public or hotel/airport shuttle transportation. The points of departure and destination as well as the nature of the trip must be indicated on receipts or travel claim.

For staff using public transportation (bus, subway, GO Train) to get to a meeting, seminar, conference etc., which is on the public transportation route, fees for tickets will be reimbursed. Claims for reimbursement shall be accompanied by the original receipt or ticket with the cost of transportation.

5. Eligible Expenses Guidelines

The attendee will be permitted eligible expenses to cover meals and expenses not covered by the registration fee. The eligible expense rates apply to each day of the conference or seminar as well as for the day of the travel prior to and immediately after the conference or seminar if applicable. The expense rate includes a provision for breakfast, lunch, dinner as well as miscellaneous expenses. Miscellaneous costs will include the actual charges for items such as parking and internet. Staff issued Smart Phones are required to use their business phones for all local and long-distance calls.

If the conference or seminar takes place in Canada, the eligible expenses will be paid in Canadian dollars. If the conference or seminar takes place in the United States the eligible expense will be reimbursed at the exchange rate when the expense was incurred or the prevailing exchange rate, if incurred date not known.

Meal Expenses (excludes alcohol):

Breakfast	\$20.00
Lunch	\$25.00
Supper	\$50.00

The amounts above do not include an amount for tipping or applicable taxes. The Town will reimburse tips up to a maximum 15%. Any amount tipped over the 15% shall be repaid by the staff member.

Any exceptions in eligible expenses must be approved by the Department Head and/or CAO.

Parking

Staff will be reimbursed for parking expenses related to travel on corporate business. There is no maximum on the per incident parking expense that can be claimed, however, staff members are expected to use their discretion and choose the most cost-effective parking available to them at the time. The use of Valet Parking is discouraged unless the rate for Valet Parking is less than general parking.

Tolls

Toll charges for Highway 407 (and other applicable Toll Highways) will be reimbursed for business trips. Reimbursement will be limited to the trip toll charges and service fees associated on the trip and will exclude any amounts related to the purchase of a transponder or service charge associated with the transponder. Claims for reimbursement shall be accompanied by the toll billing statement and confirmation of the business-related purposes of the trip.

Miscellaneous Expenses

Other expenses such as internet costs are considered approved expenses.

Mileage

Staff shall be reimbursed for mileage for business use of their personal vehicle at the rate established by the Canada Revenue Agency – Automobile Allowance Rates.

Mileage shall be calculated based on the lesser of kilometers from Town Hall (or normal Town work location) to the destination or kilometers from home to the destination.

Where the mileage submitted differs significantly from customary mileage amounts without reason or explanation, a service such as www.mapquest.com or www.googlemaps.ca will be utilized by the Finance Department to calculate a normal rate.

6. Expenses Not Approved

- Extended travel time and related expenses are at the traveler's own expense;
- An expense for a spouse or companion will not be approved, staff are permitted to bring spouses and companions however they must cover those expenses as a personal expense and not a business expense;
- Town staff will not be reimbursed for alcoholic beverages under any circumstances and shall not utilize their P-card for the purchase of alcoholic beverages;
- Town staff will not be reimbursed for the cost of a fine;
- Town staff will not be reimbursed for additional add on's to conferences such as golf tournament or social or networking events not covered in the base registration fees, the CAO may approve this type of expense if the event aligns with the strategic priorities of the Town; and
- Staff will **not** be paid for costs incurred when travelling to and from their home to their normal workplace.

Exclusions

There are no exclusions to this policy.

References and Related Policies

- POL.13.23 Corporate Vehicle Policy
- POL.13.24 Progressive Discipline Policy
- FIS.09.10 Payment Card (P-card) Policy
- Canada Revenue Agency Annual Automobile Allowance
<https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/payroll/benefits-allowances/automobile/automobile-motor-vehicle-allowances/automobile-allowance-rates.html>

Consequences of Non-Compliance

Failure to adhere to the requirements outlined in this Policy may lead to progressive disciplinary action up to and including termination of employment.

Review Cycle

This policy will be reviewed once every term of council by the SMT. Any substantive changes to this policy will require Council approval.