

TRAVEL (EXPENSE) ALLOWANCE

Background

From time-to-time employees carry out District functions, duties and responsibilities on behalf of the District.

The purpose of this Administrative Procedure is to ensure consistent and equitable treatment of those employees carrying out duties, functions and responsibilities on behalf of the District and to provide for the reimbursement of authorized travel and expenses.

Employees travelling and working on District business shall be reimbursed for expenses that are incurred in the course of undertaking authorized District business.

This Administrative Procedure applies to Ministry funding for District budgetary functions, Ministry grants, Federal funding, School generated funds and District generated funds but excludes District funds provided in the Provincial Collective Agreement to the CFTA for Professional Development.

Definitions

District: Means the boundaries that include the City of Cranbrook, Areas A, B, and C of the Regional District of East Kootenay, the City of Fernie, the District of Sparwood and the District of Elkford.

Business Expenses: Means expenses incurred by employees or trustees required to attend meetings of the Ministry including legislated agencies (BCSTA, BCPSEA) and any functions authorized by the Board that provide educational programs and/or services to District students.

Discretionary Funds: Budget contingency or surplus funds that have not been specifically allocated to an individual's travel/expense allowance.

Incidental Allowance: Minor expenses incurred with authorized District travel, such as, gratuities, telephone calls home and laundry services.

Procedures

1. Funds provided by the Ministry of Education and/or funds generated by the District must not be used for any direct or indirect personal benefit but must be used for District approved expenditures.
2. Funding allocated by the Ministry of Education, the Federal government, and funds generated by the District and schools must be utilized for educational purposes. There are no funding allocations made, or permitted, to a budget definition "Discretionary Fund".

3. Accountability and transparency measures are essential in the appropriate and defensible allocation and expenditure of all District funds to reflect the misuse of discretionary.
4. Employees shall not accept any gift of cash or in kind from persons doing or seeking to do business with the District.
5. Travel/Expense allowances will be reviewed by the Board during the Annual Budget Process.
6. The following details specify the tasks required to deliver the provisions of this travel/expense allowance Administrative Procedure.

6.1. General

- 6.1.1. Out of Canada travel may only be undertaken with the prior approval of the Board requiring the individual's submission of an Out of Canada travel request outlining the purpose and all associated expenses.
- 6.1.2. Out of District travel within Canada must be approved in advance by the Superintendent for educational personnel, the Secretary Treasurer for operational personnel and by the Board Chair for the Superintendent and Secretary Treasurer.
- 6.1.3. District credit cards are not to be used for personal expenses.
- 6.1.4. Authorization of expenses related to District business within the District must specify how such expenses are related to District business and must be approved in advance by the appropriate Senior Management Staff.
- 6.1.5. Business expenses for special circumstances involving visitors, guests or extraordinary meetings within or outside the District must be authorized by the Board Chair.
- 6.1.6. Employees are responsible for verifying and double checking their expenses claimed and expenses paid.
- 6.1.7. All travel/expense claim reimbursement forms ([Form 513-1](#)) will be scrutinized and authorized for processing by the Secretary Treasurer and/or the Board Chair.
- 6.1.8. Alcohol expenses will not be reimbursed.
- 6.1.9. Certified travel/expense claim forms ([Form 513-1](#)) must be submitted within 30 days of the function/event.
- 6.1.10. An advance may be claimed for approved travel and is subject to the allowable rates in this Administrative Procedure. The accounting department personnel require two weeks-notice for processing advance cheques.
- 6.1.11. Expense claims must contain all the items associated with the travel/event and with the appropriate budget codes. (Refer to Expense Claim form ([Form 513-1](#)) with budget codes).
- 6.1.12. In the event of travel/accommodation changes and/or cancellations due to emergency circumstances the employee will be reimbursed for any out-of-pocket expenses. Expenses that are claimed must include itemized receipts or invoices pertaining to the emergency circumstances and net of any refunds.

6.1.13. Receipts are required for all expenses claimed except for Per Diem meal, Incidental and Kilometer allowances.

6.2. Transportation (Personal Vehicle)

6.2.1. When a person's privately owned vehicle is used for authorized District business, transportation expenses will be reimbursed at the District rate.

6.2.2. Travel between home and work is excluded as a transportation expense.

6.2.3. Whenever possible every effort is to be made by individuals going on District business to travel together with only one person reimbursed for the transportation expense.

6.2.4. In the event an individual chooses to travel by personal car rather than air, the District will pay the most economical travel.

6.2.5. The District provides a business use insurance coverage that will allow employees to drive personal vehicles up to 1600 km per year.

6.2.5.1. The District will maintain an ICBC Special Policy that automatically provides coverage for employees who drive more than 6 days per month, but less than 1600 km per year.

6.2.5.2. In accordance with ICBC guidelines "3.1 Employees who have insured their vehicles for 'to and from work' (Class 002 or 003) may use their vehicle six (6) days per month for 'business use', without upgrading to business insurance".

6.2.5.3. Employees who have insured their vehicles for 'pleasure only' (Class 001) may also use their vehicle six (6) days per month to travel 'to and from work' or for 'business use', but not both, without upgrading to business insurance.

6.2.5.4. District employees are eligible to claim for the added cost of business insurance if they travel more than six (6) days per month on District business. Any reimbursement will be limited to the difference between what the employee would normally pay for insurance and the upgrade to business.

6.2.6. The District will reimburse employees for damage to vehicles covered under the comprehensive portion of the employees' insurance to a maximum of \$50.00. Damage must have occurred while the vehicle was used on an approved District activity. A copy of the ICBC claim must be attached to the expense claim ([Form 513-1](#)).

6.2.7. The District will not reimburse anyone for losses incurred from accidents, parking violations, or traffic violations.

6.3. Transportation (Vehicle Rentals)

6.3.1. Vehicle rentals are only acceptable in circumstances where it is the most economical option to travel to a meeting or event site.

6.3.2. The most economical and appropriate option available is to be rented.

6.3.3. Receipts for the cost of the rental, the appropriate insurance and the cost of fuel must be included with the submitted expense claim ([Form 513-1](#)).

6.4. Transportation (Other):

- 6.4.1. Other transportation such as ferries, bridge tolls, causeway tolls, bus transits, park fees and parking fares require receipts to be included with the submitted expense claim ([Form 513-1](#)).
- 6.4.2. Cost of transportation to and from an airport to the meeting or event site may be claimed. It is expected that airport shuttles, airport bus or transits would be used with taxis as a last resort and preferably with other District personnel. Consideration of employee safety is respected when choosing the transportation option. Applicable receipts must be included with the submitted expense claim ([Form 513-1](#)).

6.5. Transportation (Air):

- 6.5.1. All District air travel must be booked by the office of the Principal or the appropriate Senior Management staff as far in advance as possible so as to take advantage of reduced fares.
- 6.5.2. District air travel shall be in economy class at the lowest fares available.
- 6.5.3. Individuals must use the best method of travel to minimize time away and keep costs to the District at a minimum.

6.6. Per Diem Meals and Incidentals:

- 6.6.1. Individuals traveling out of the District on authorized District business may claim reimbursement for meals that are not otherwise provided or paid for by the program or covered by the registration fee.
- 6.6.2. Depending upon the individual's departure from home and arrival back home reasonable meal allowances may be claimed.
 - 6.6.2.1. Breakfast will be paid in cases where travel is required prior to 7:00 am or ends after 9:00 am.
 - 6.6.2.2. Lunch will be paid in cases where travel is required prior to 11:00 am or ends after 1:00 pm.
 - 6.6.2.3. Dinners will be paid in circumstances where travel is required prior to 5:00 pm or ends after 7:00 pm.
- 6.6.3. For each day or part day in travel status on authorized District business, individuals may claim an Incidental expense of \$15.00 for each night of hotel accommodation.
- 6.6.4. Per Diem rates are:

Breakfast: \$20.00 Lunch: \$25.00 Dinner: \$35.00

Per Diem meal and Incidental allowances do not require receipts. Individuals claiming a Per Diem meal and/or Incidental allowances must submit a Per Diem form ([Form 513-1](#)) for reimbursement.

6.7. Accommodations:

- 6.7.1. All accommodations when traveling on authorized District business must be reserved through the office of the Principal or the appropriate Senior Management staff.

- 6.7.2. Individuals must minimize time away and keep costs to the District at a minimum.
- 6.7.3. Accommodation expenses include only the hotel rate taxes and fees.
- 6.7.4. Individuals shall stay at the designated accommodation sites with the most reasonable Ministry, BCSTA or District rate. The cost of upgrading will be the responsibility of individuals.
- 6.7.5. Depending on event scheduling and scheduled air flights it may be required to travel the evening before and/or travel the morning after the event. These circumstances require preauthorization of the Secretary Treasurer or the Board Chair.
- 6.7.6. The allowance for overnight accommodation at the home of family or friends is \$30.00.

Reference: Sections 22, 23, 65, 85 School Act
Income Tax Act

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