



Policy Manual – Finance

F.M.05 – Employee Expenditures – Travel/Conferences etc.

The mission of Catholic Education in Hamilton-Wentworth, in union with our Bishop, is to enable all learners to realize the fullness of humanity of which Our Lord Jesus Christ is the model.

POLICY STATEMENT

The Board is committed to support employees while representing the interests of students, the community and promote the mission of our Catholic School Board. It is recognized that in doing so, legitimate out-of-pocket expenses may be incurred for which employees should be reimbursed.

Purpose

Effective management of resources and good stewardship is a stated priority of the Board. Promoting responsible and accountable behaviour by clearly articulating eligible and legitimate reimbursable expenses will help achieve this priority. This policy applies to all Board staff.

To achieve this policy, the following apply:

1. Travel Reimbursement

The purpose of the mileage expense policy is to reimburse claimants for the cost of operating their vehicle for required driving in excess of their daily commute – (defined as the travel to work and back).

Claims for reasonable travel incurred in the conduct of Board business shall be reimbursed. The procedures below apply to all employees, unless otherwise specified by a collective agreement:

- (i) Claims will be reimbursed at a rate per kilometre as established by the Board.
- (ii) Claims must be submitted on a monthly basis using the approved form. All expenses shall be claimed during the appropriate corresponding budget year.
- (iii) Details specific as to location and purpose must be provided for all mileage claims. All claims for in city/town travel will be reimbursed according to kilometres travelled.
- (iv) Claims may not be made for any distance equivalent to or less than the distance between one's home and one's normally assigned work location (base) and vice versa.
- (v) Carpooling is strongly encouraged whenever possible.
- (vi) Claims for reimbursement of expenses shall require the approval and/or authorization for payment as follows:
 - (a) All staff from the site manager/principal.
 - (b) Senior manager/manager/principal/consultant travel requires the Superintendent's approval.
 - (c) Assistant Superintendent travel requires the Superintendent's approval.
 - (d) Superintendent travel requires the Director's approval.
 - (e) Director's travel requires the approval of the Chairperson of the Board.
- (vii) Employees travelling outside the jurisdiction on official Board business should use the most economical means of travel.

2. Attendance at Conferences, Workshops, Seminars

Within the limits of the Broader Public Sector Guidelines and subject to prior approval by applicable supervisors, staff will be reimbursed for expenditures incurred with appropriate receipts **and itineraries** submitted:

- Hotel room charges (standard room) **will be reimbursed for overnight accommodation when travel beyond 100 kilometres (one way) is required. Despite this, staff participating in conferences/meetings in downtown Toronto will be allowed to claim for overnight accommodation. In addition, it may be more economical for employees engaged in multi-day meetings which are outside of the City of Hamilton to stay at or close to the meeting location. Additional details may be requested if employees select this option.**
- Registration fees for approved conferences
- Meals (including tax and gratuities up to maximum meal reimbursement rates as per chart below—receipt must be provided)
- Business telephone calls
- Taxi costs
- Parking fees
- Train/airline tickets when determined to be the most practical mode of transportation for the event/occasion at standard pricing. Airfare will be reimbursed up to the cost of Economy or equivalent. In cases where there are multiple stops and/or excessive layover time, a more direct route at a higher cost could be approved.

Meal Rates:

Meal Type	Maximum Meal Reimbursement Rate
Breakfast	\$10.00
Lunch	\$12.50
Dinner	\$22.50

The following expenses will not be covered:

- **Pre or post conference activities**
- Movies
- Charges for use of recreational/fitness facilities
- Charges incurred by a family member
- Parking tickets or Traffic Act violations
- Highway 407 ETR charges (unless pre-approved)
- Personal gifts
- Alcoholic beverages

3. Telephone Expenses

- (i) Long distance and cellular airtime charges for calls regarding Board business may be submitted on a monthly expense account with appropriate verification.
- (ii) Long distance calls to home while out of the system on Board business will be allowed, within reasonable limits. Other personal calls will not be reimbursed by the Board.

4. Other Expenses

An employee may be reimbursed for all or part of his or her out-of-pocket expenses reasonably incurred in connection with the carrying out of Board related activities. Claims for reimbursement of expenses shall require the approval from the employee's immediate supervisor.

Approvals

An expense voucher may be submitted at the end of each month for payment but must be submitted at least quarterly.

All expenses must be accompanied by original receipts and the original bill/invoice providing details of the expense.

All expenses related to the prior school/fiscal year must be approved and submitted to the accounts department for reimbursement within the first two weeks of September/new school year.

Regulations

Broader Public Sector Accountability Act

Broader Public Sector Expenses Directive

Broader Public Sector Perquisites Directive

Related Board Committee: Committee of the Whole

Policy Review Date

BM Original Policy Approved April 10, 2007

Revisions: 4 September 2012, 20 June 2017, 01 February 2022

To be reviewed every **five** years.