STAFF TRAVEL AND EXPENSES

GOVERNANCE POLICY

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1.0 PRINCIPLES

The South Shore Regional Centre for Education (SSRCE) recognizes its responsibility to reimburse staff members for ordinary expenses incurred while traveling to and/or attending functions, meetings, conferences, professional development and job-related SSRCE business.

2.0 POLICY FRAMEWORK

This policy complies with the Education Act and other related provincial acts and policies.

3.0 AUTHORIZATION

The Regional Executive Director is authorized to issue procedures in support of this policy.

STAFF TRAVEL AND EXPENSES

ADMINISTRATIVE PROCEDURES

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1.0 PROCEDURES

1.1. Expenses associated with the following activities will qualify for reimbursement:
   1.1.1. Meetings called or authorized by senior administrators.
   1.1.2. In-services, seminars, program planning/evaluation meetings, visits to schools, conferences, and meetings with the Nova Scotia Department of Education and Early Childhood Development or other external agencies.
   1.1.3. Meetings of the SSRCE or any of its committees where the presence of the employee has been specifically requested by the Regional Executive Director of Schools or a designate.
   1.1.4. Meetings of school community organizations where the presence of the employee has been specifically requested by the Regional Executive Director of Schools or a designate.
   1.1.5. Travel and expenses which are sanctioned through the provisions of specific job descriptions.

1.2. Provisions of a legally binding agreement (e.g. collective agreements) will prevail insofar as they are applicable to staff travel.

1.3. Staff members who have been issued an SSRCE credit card may use it to pay for travel (excluding gas) and expenses related to SSRCE business.

1.4. All other staff members shall pay travel and expenses related to SSRCE business themselves and submit an expense claim for reimbursement. See 8.0 of this document for further instructions.

1.5. If the staff member prefers, accommodations, conference registrations, memberships and vehicle rentals can be direct billed to the SSRCE.

2.0 MEAL ALLOWANCES

2.1. The maximum amounts that can be claimed for meals are the amounts specified below. These rates will follow the provincial rate for all thresholds and will be automatically implemented when the provincial rate is changed, without SSRCE approval.

2.1.1. Breakfast: As per provincial rate
2.1.2. Lunch: As per provincial rate
2.1.3. Dinner: As per provincial rate

Employees are required to use per diem allowances for meals during business travel rather than submitting actual receipts. This will ensure fairness and transparency, reduce the administrative burden for both employees and the employer, and aligns with best practices. Per diems are not necessarily intended to cover the entire cost of a meal in every situation—they are designed to provide a reasonable allowance for meals during travel.

2.2. Actual and reasonable expenses may be reimbursed, with pre-approval from the employee's direct supervisor. In such cases itemized original receipts along with proof of payment are to be attached to the claim form. Gratuities shall not exceed 15% of the total meal cost.

2.3. Meal expenses within the SSRCE boundaries will not normally be authorized.

2.4. If a staff member has purchased a meal for another employee or a business associate, the staff member must document all attendees on the itemized original receipt.

2.5. The cost of breakfast may only be claimed when the employee has been traveling on SSRCE business overnight or traveling for more than one hour before the recognized time for the start of the day's work.

2.6. The cost of the evening meal may only be claimed when the employee is traveling on SSRCE business and is not expected to return to their residence for more than two hours after the recognized time for the end of the day's work.

3.0 EXPENSES NOT ELIGIBLE FOR REIMBURSEMENT BY THE SSRCE

3.1. The following expenses are not eligible for reimbursement by the SSRCE:

3.1.1. Meals that are provided or included in a conference registration fee
3.1.2. Meals that are provided or included in a meeting
3.1.3. Alcohol beverages
3.1.4. Mini bar sundries
3.1.5. Movie rentals
3.1.6. Dry cleaning
3.1.7. Personal calls
3.1.8. Parking fines, traffic violations, or towing expenses
3.1.9. Gratuities may not be claimed in addition to the per diem rate, as they are provided for in the per diem allowances
3.1.10. Kilometrage not related to SSRCE business
3.1.11. Any other personal expenses not listed above
3.1.12. Any other expenses are not deemed reasonable.

4.0 LODGING AND ASSOCIATED EXPENSES

4.1. While travelling on SSRCE business, due regard must be given to frugality/economy when booking accommodations. The use of luxury accommodation is not permitted and will not be reimbursed. When planning trips, staff members should normally stay at establishments offering preferred discount rates. It is the responsibility of the staff member to identify they are a SSRCE staff member to ensure that the preferred rate for commercial accommodation is provided.

4.2. Cancellations and Guaranteed Reservations

4.2.1. When travel plans change and the accommodation is not required, the staff member shall ensure that reservations are cancelled directly with the commercial establishment(s). Proof of cancellation shall be obtained (i.e.: cancellation number and agent's name).

4.2.2. Fees incurred due to failure to cancel will not be reimbursed.

4.3. Private Accommodation

4.3.1. Where a staff member is required to be away overnight on SSRCE business and they use private accommodation, the staff member may be reimbursed to a maximum of $25 per night. Private accommodation is not an establishment that is in the business of providing daily lodging to the public.

4.4. Hotel Charges

4.4.1. It is the staff members' responsibility to review the hotel charges and to question charges that were not authorized, or where the amount is incorrect. Expenses that may be claimed include:

4.4.1.1. Room rental
4.4.1.2. Parking fees
4.4.1.3. Internet fees

5.0 PARKING FEES

5.1. Staff members may claim parking fees for short-term parking when on SSRCE business, overnight parking when not provided with accommodation, and parking at an airport or other transportation terminal (if it is less costly than access via bus, taxi or shuttle).

5.2. Staff members will use free parking when available and metered parking in preference to lot parking if the expected duration of parking is within the time permitted. Fines for overtime parking are not an allowable expense.

6.0 TRAVEL EXPENSES

6.1. Effective April 1 of each year the kilometrage rate will follow the provincial rate for all thresholds and will be automatically implemented when the provincial rate is changed, without SSRCE approval. The following thresholds apply:

Kilometers Driven	Rate
0 – 16,000 km	As per the provincial rate
16,000.1 + km	As per the provincial rate

6.2. When staff members travel to the same location for the same time period, they should car pool instead of taking more than one vehicle.

6.3. Staff members using their privately-owned vehicle must maintain adequate automobile insurance coverage, a valid driver's license and car registration.

6.4. The SSRCE assumes no financial responsibility for the payment of insurance premiums.

6.5. The SSRCE assumes no responsibility for the deductible amounts related to comprehensive or collision coverage.

6.6. The SSRCE assumes no responsibility for damages to a staff member's vehicle while on SSRCE business.

6.7. All travel outside of Canada must receive prior approval from the Regional Executive Director (or designate) before any travel arrangements can be made.

6.8. Amounts can be claimed for:
   6.8.1. Taxi Fares – receipts required more than $15
   6.8.2. Toll Fees (such as ferries, toll highways, etc.) – receipts required more than $15

6.9. Employees who use their own vehicle on the employer's business shall be reimbursed at the SSRCE rate for kilometrage (as noted in 6.1) over and above those kilometers they normally incur to travel from and to their residence and their base work location.
Kilometers will be calculated using the most direct or expeditious route.
It will be calculated using the following method:
   6.9.1. Determine the distance between home and designated work/base location (as defined by Human Resources).
   6.9.2. Track the total kilometers driven for work each day, from departure to return home, using the most direct route.
   6.9.3. Eligible kilometers = Total work-related kilometers minus the round-trip distance between home and base location.

Example:
1. Home (Mahone Bay) ↔ Work/Base location (Forest Heights Community School) = 40 km round trip.
2. Total work-related travel (starting when left home and ending when returning home) = 96.9 km. This includes only kms driven.
3. Eligible for reimbursement: 96.9 km – 40 km = 56.9 km.

   6.9.4. Only kilometers driven for work purposes are eligible.
   6.9.5. The base location is used solely for initial calculation.
   6.9.6. Kms are not eligible for reimbursement if they are not actually driven therefore, the work/base location may not be the starting point for all mileage.

7.0 RENTAL VEHICLES

7.1. Travel using a rental vehicle shall be encouraged and authorized when, in the opinion of the employee's supervisor, this method is practical, economical and safe (depending on weather conditions).

7.2. Any fuel charges for the rental vehicle may be paid for using a SSRCE issued credit card, or the staff member shall pay it and submit an Expense Claim Form for reimbursement. The itemized receipt is to be attached to the claim.

7.3. Where reasonable and practical, compact-sized vehicles shall be rented. Full-size or specialty vehicles may be used only when warranted by:
- 7.3.1. The number of passengers to be carried.
- 7.3.2. The bulk or the weight of the goods to be transported.
- 7.3.3. An extenuating circumstance, such as hazardous weather conditions.

7.4. Vehicles that are rented should be returned to same rental location that they were rented from. If for some reason the vehicle cannot be returned to the same rental location, drop-off charges shall not be reimbursed unless preauthorized by the staff member's supervisor.

8.0 EXPENSE CLAIM FORM

8.1. Before a staff member submits an expense claim form to their supervisor for approval, the following must be verified by the staff member:
- 8.1.1. All calculations are accurate and complete.
- 8.1.2. Complete name, address, base location, position and reason.
- 8.1.3. The correct accounts (GL, Cost Center, Fund, Functional Area and Internal Order Number) are assigned.
- 8.1.4. The correct vendor number is included on the claim form (this is on the electronic expense claim form or may be obtained from accounts payable staff).
- 8.1.5. All original itemized receipts are attached.
- 8.1.6. The claim has been signed and dated by the staff member.

8.2. Expense claims will be returned to the staff member for being incomplete, for example: calculation errors, no signatures, no account information, etc.

8.3. When and where to submit claims:
- 8.3.1. Expenses incurred by a staff member for SSRCE business must be submitted on an expense claim form and submitted to the staff member's supervisor.
- 8.3.2. The supervisor is responsible for reviewing the claim and ensure it complies with this policy. If in accordance with this policy the supervisor shall approve it by signing it and then forward it to the Finance Department.
- 8.3.3. Only original expense claims will be accepted. Faxed or scanned forms may not be accepted for processing.
- 8.3.4. Staff members are to submit their expense claim forms on a monthly basis to their immediate supervisor. Expenditures submitted outside of the fiscal year may not be compensated.

8.4. The Director of Finance shall bring identified issues relating to staff member's expense claims to the attention of the supervisor who approved the claim or to Senior Management for resolution.

8.5. At year-end the Finance Department will communicate the final deadline for all expenses to be submitted (with receipts).

8.6. Expense claims will be reimbursed by direct deposit in a timely manner on the next scheduled payment date, if approved documents are submitted to Accounts Payable by the appropriate date.

8.7. All receipts must be attached to the expense claim form showing the details of what was purchased, and that payment was made (per diem claims is an exception). For example, on-line purchases such as airfare must include the invoice details and must show that payment was made by including the credit card receipt or statement.

8.8. Claims for such items as airline flights, train travel, etc. must include the itinerary with the staff member's name, dates of travel, purpose of travel, to and from, etc.

9.0 FORMS

9.1. SSRCE travel-related forms will be updated as required by the Director of Finance. The following items can be found on the Forms and Documents section of the SSRCE website:

9.1.1. Employee Expense Claim Form

9.1.2. Hotel Room Authorization Form – use this form if the room is to be direct billed to the SSRCE. Once approved, this form must be e-mailed to the hotel and the Finance Department.

9.1.3. Vehicle Rental Form – use if the vehicle rental is to be direct billed to the SSRCE. Once approved, this form must e-mailed to the rental company and the Finance Department.

10.0 RESPONSIBILITIES

It shall be the responsibility of the Regional Executive Director to ensure these administrative procedures are followed.