

# UNITED NATIVE FRIENDSHIP CENTRE

<b>Title:</b>	<b>Training &amp; Development</b>	<b>Approved:</b>	<b>November 27, 2012</b>
<b>Subject:</b>	<b>TRAVEL POLICY</b>	<b>Revised</b>	

## 1. Purpose

As an employee of UNFC, you may occasionally be required to travel on company business. While traveling for business-related purposes, employees are representatives of the Company and are expected to conduct themselves in such a way to positively reflect UNFC's values and image at all times.

As such, the intent of the Travel Policy is to outline approved expenses and the procedure to reimburse employees for reasonable travel expenses associated with various operation of the United Native Friendship Centre.

*Note: Individuals eligible for reimbursement under this policy will be referred throughout by the word "employee".*

## 2. Scope

The Travel Policy applies to UNFC employees in the course of their business-related travel at all times.

This Policy Shall:

1. Define approved expenses.
2. Outline travel expense reporting procedure.

## 3. Travel Approval

Prior to making travel arrangements, acquire approval from the appropriate signing authority (Executive Director, or designate) using the Travel Advance Claim Form available. The program worker/supervisor must ensure that regular duties will be maintained during the absence, that the travel is appropriate, and that the necessary travel funds are available. Approval will ensure that health and safety and other insurance coverage are maintained while the employee is travelling. Employees cannot approve the reimbursement of their own travel expenses.

*Note: Considerations for making decisions will be based on circumstances such as accommodation, length of travel, and health and safety.*

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## 4. Approved Travel Expenses

### 4.1 Transportation

All company transportation will be conducted in the most economical manner possible. Whenever possible, tickets should be booked at least seven (7) days in advance to benefit from any discounts offered by the carrier, or through the negotiations made by UNFC. All tickets shall be purchased from UNFC preferred vendors.

#### 4.1.1 Air Travel

- Air travel is required for employees traveling in excess of 800 km return unless the traveler can show mileage expenses being less than the cost of an airline ticket to the same destination.
- Coach class shall be used as the standard in the interest of costs-savings.

#### 4.1.2 Surface Transportation

- The cost of public transportation (i.e. taxis, buses or subways, etc.) will be reimbursed contingent on production of receipt.
- Expenses related to personal travel will not be reimbursed.

#### 4.1.3 Private Vehicles

- Employees may use their own vehicle for business travel purposes if it is deemed less expensive than the rental of a car, public transportation or if it offers a significant savings of time.
- The employee must have coverage through his/her personal insurance provider. The employee must notify their insurance company (broker/agent) to ensure that it is being rated properly (*business use*).
- Standard mileage reimbursement is .50 per kilometre/mile (.52 if transporting another employee). This takes into account all actual expenses including fuel, oil, maintenance, insurance, depreciation, etc.
- Driving versus flying; the traveler must show mileage expenses being less than the cost of an airline ticket to the same destination.
- In the event that the traveler incurs higher costs than the standard specified, the traveler must declare them in a statement and receipts are to be submitted with the expense report to be considered for reimbursement. The fixed and variable costs must be documented in the report.
- Parking, tolls, and ferries required will be reimbursed; receipts required.
- Any costs associated with the maintenance, fuel, vehicular breakdown, or damage incurred while driving a personal vehicle are covered in the standard mileage rate and will not be reimbursed.

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- Any traffic violations, including parking tickets, will not be reimbursed by the company.

### 4.1.4 Rental Cars

- Prior approval from Executive Director is required.
- Compact or economy models will be used in regards to cost-savings.
- Exceptions may be made regarding vehicle size in the event of two or more passengers, or load requirements. Any exceptions must have written approval prior to their reservation.
- Rental of vehicles are not allowed in metropolitan areas that have substantial public transportation services available.
- Renting of vehicles will be booked through a preferred vendor.
- *Personal liability and physical damage insurance is required on all rented vehicles.*
- In the event of damage to a rental car, contact your supervisor immediately. All accidents must be reported in writing immediately upon return, or earlier with trips lasting more than three (3) days after damage has occurred. A police report is also required.
- Employees will fill the gas tank prior to the return of the rental car. The employee renting the vehicle may be required to personally reimburse the fuel surcharge fee if he/she fails to fill the vehicle gas tank prior to return.
- *Pre-purchase of gas at the rental counter is discouraged.*
- Any traffic violations, including parking tickets, will not be reimbursed by the company.
- Employees do not claim mileage along with a rental car.

### 4.1.5 Rail Travel

- All reservations will be made in coach class.

### 4.1.6 Bus Travel

- Bus travel will only be used when travel by other means is not feasible, or when specifically requested by the employee.

**NOTE:** *In general, local mileage for occasional trips by a staff member is not claimable, but where staff, in the normal performance of their duties make frequent or long duration trips, special consideration may be given on prior approval by management.*

### 4.2 Meals

- A per-diem rate of \$10.00 for breakfast, \$10.30 for lunch, \$27.60 for dinner will be supplied to traveling employees to cover the costs associated with reasonably priced meals and \$10.00 incidentals per each overnight.

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- Employees are not required to produce receipts for meals.
- Breakfast shall be paid in cases where travel is conducted prior to 7 a.m., or ends after 9 a.m.
- Lunch shall be paid when travel begins prior to 11 a.m., or ends after 1 p.m.
- Dinner shall be paid when travel begins prior to 5 p.m. or ends after 7 p.m.

### 4.3 Lodging

- Reservations for accommodations should be made with mid-range hotels.
- In the interest of economy, minimum requirement reservations (i.e. single traveler - single occupancy) should be made.
- Reservations should be made with preferred vendors.
- It is the employee's responsibility to cancel reservations by the deadline specified by the hotel. *Room costs incurred due to failure to cancel will not be reimbursed.* Employees are also required to make note of the cancellation number.

### 5. Travel Expense Claim/Report

The Travel Expense Report contains detailed information about travel expenses charged to specific departments, including the name(s), destination(s), purpose(s) of, and specific expense(s) of trips made.

Employees are expected to submit a Travel Expense Advance Claim form prior to travel as soon as travel is confirmed. All expenses documented must be associated with a valid business purpose, and fall within company guidelines. Keep a copy of the completed Travel Expense Advance Claim form. Employees are obligated to retain and submit receipts for any business expense not covered by the per-diem.

- Entertainment costs will not be covered by the company.
- Incidentals will not be reimbursed when travel is less than one (1) full overnight.
- Ticket receipts for airline fares must be submitted with the expense account report.
- Receipts for taxi fares must be submitted with the travel expense claim.

### 6. Reconciliation

- Travel Expense Claim form; attach appropriate receipts, ensure reconciliation adjustments are approved by the appropriate signing authority and forward to Finance Office with reimbursement form - within 10 working days of completing the trip.

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- Regarding reimbursement travel, employees are responsible for all charges made against their travel and an invoice in Accounts Receivable will be issued. The reimbursement received against the travel will offset the expenses and the difference owing will be the responsibility of the employee.
- Any expenses reimbursed that have not been received in an advance claim will be paid to the employee in a timely manner once all expenses have been reconciled.

### 7. **Compensatory Time for Travel**

- Employees are encouraged to travel during work hours, 8:30 a.m. to 4:30 p.m.
- Employees traveling on UNFC business will accumulate compensatory time based on the need required for travel.
- All compensatory time will be approved by Executive Director, or designate.

### 8. **Administration**

This document was approved by the UNFC Board of Directors on November 27, 2012 and is to be used as the Travel Policy for UNFC employees.