

HIRRA TRAVEL EXPENSE POLICY

[Revised and approved June 2018]

PURPOSE: The purpose of this travel policy is to provide a framework for reimbursement of reasonable, **actual** costs incurred by HIRRA employees & volunteers while travelling on pre-approved HIRRA business, or pre-approved attendance at conferences, seminars and training courses, etc. We aim to strike a balance of

- a) fairness to those travelling on behalf of HIRRA, and
- b) responsibility to the taxpayers of the Community.

It's understood that expenditures for travel will sometimes be a cost of doing business, but it's important for HIRRA to minimize the need for paid travel so as to maximize the amount of tax money available for direct service to our Community. HIRRA reserves the right to refuse or adjust reimbursement of any claimed travel expenses deemed not reasonable.

1. **PREAPPROVAL FOR TRAVEL:** For **any** travel expenses to be covered by HIRRA, they must be pre-approved by the appropriate authorizing body. Travel by employees must be pre-approved by either their Manager or Management Committee. Travel by volunteers must be pre-approved by the HIRRA Executive. Travel by the HIRRA Executive must be pre-approved by the Assembly. Any travel expense claims not pre-approved due to emergency circumstances may be appealed to the Executive for consideration. Such emergency travel claims will be considered for approval if they meet all of the following criteria:
 - a) it was impossible to obtain regular pre-approval
 - b) it was necessary and/or clearly in the best interests of HIRRA
 - c) the expenses claimed are reasonable and in line with the stipulations in this policy document.

2. **TRAVEL FORM REQUIREMENTS:** In order to get pre-approval for travel, a "**Pre-Approval for Travel**" form (showing **all projected** travel costs) must be filled out, submitted to, and signed by the appropriate authorizing body. The pre-approval process will involve a review of projected costs for reasonableness, consistency with this policy document, and consideration of any possible less costly alternatives where applicable (e.g. ordering materials/supplies for delivery instead of pick-up, ordering materials/supplies for pick-up by volunteers travelling to the destination anyway, and if appropriate, travel by public transit instead of private vehicle). The reverse side of the "Pre-Approval for Travel" form (titled "**Travel Expense Claim**") is for showing **actual** travel costs and is to be completed after travel. **Receipts for all claimed costs must be attached.** Any claimed expenses not backed up by receipts will not be processed. The form will then be re-submitted to the same authorizing body, who will then review the Expense Claim for accuracy/reasonableness/consistency with pre-approval, and when satisfied

forward it to the HIRRA Bookkeeper for reimbursement.

NOTE: HIRRA credit cards cannot be used to pay for costs incurred on HIRRA-related travel as this would bypass the travel claim Pre-approval Process.

3. **MEANS OF TRAVEL:** Travel will be by the most appropriate means, taking into consideration budget, convenience, travel time, the possible need for a vehicle at the destination, and the number of persons travelling together. Car-pooling is encouraged when more than one person is approved to travel.
4. **PERSONAL VEHICLE USE:** The only claimable costs for personal vehicle use are the “per kilometer rate” established by the HIRRA Executive, and parking charges if they apply. The “per kilometer rate” used:
 - a) is meant to cover gasoline & general “wear and tear”
 - b) will not exceed that of the CVRD, and
 - c) is **55 cents** as of January, 2018 (taken from CVRD travel policy).
 - d) Such things as parking fines, speeding tickets, mechanical breakdowns, and accident-related costs are the responsibility of the vehicle owner.
5. **MAXIMUM KM:** The maximum roundtrip kilometers that can be claimed for the following destinations are (taken from CVRD travel policy – Jan., 2018):
 - a) Courtenay: 86km
 - b) Campbell River: 180km
 - c) Nanaimo: 208km
 - d) Victoria: 432km.

NOTE: ICBC normally considers travel on behalf of organizations like HIRRA as “travel to and from work”. Vehicles insured for work purposes will be covered for this, and most vehicles insured for “pleasure use only” are covered for up to 6 days per month of work-related use. But, it’s the responsibility vehicle owners to protect themselves by understanding their actual insurance coverage.
6. **MEALS:** When travel for HIRRA necessitates the traveler’s time over normal meal periods, meal receipts will be reimbursed up a maximum of the following amounts (taken from CVRD travel policy – Jan., 2018):
 - a) Breakfast: up to \$15
 - b) Lunch: up to \$20
 - c) Dinner: up to \$25

Day trips on HIRRA’s behalf will be eligible for Lunch reimbursement only. **Meal-related items** such as tobacco products and beverages containing alcohol are the traveler’s responsibility.
7. **PROVIDED MEALS:** When travelers are attending events where meals are provided, they will not be able to claim those meals from HIRRA as a travel

expense.

8. **WAGES, TRAVEL TIME, OVERTIME:** Only HIRRA staff can be considered for reimbursement for wages/travel time. When payment for travel time is appropriate, it shall be at the BC minimum wage rate (as per the BC Employment Standards Act). Overtime shall be avoided unless absolutely necessary and/or in the best interests of HIRRA. HIRRA managers are ineligible for overtime (as per the BC Employment Standards Act).
9. **NON-REIMBURSABLE EXPENSES:** Miscellaneous/incidental expenses such as newspapers, magazines, entertainment, etc. are not reimbursable.
10. **TRAVEL COMPANIONS:** If someone involved in HIRRA-related travel elects to have someone accompany them (e.g. their spouse), any additional travel-related costs (e.g. extra accommodation cost resulting from an extra person in a hotel room, extra meals, etc.) will be the traveler's responsibility.
11. **LOCAL TRANSPORTATION AT DESTINATION:** Local transportation is a claimable expense when used to/from the business function. It can include taxi, bus and rapid transit. Car rental may be approved in circumstances where travel by less expensive means is not possible/practical.

PRE-APPROVAL FOR TRAVEL (please print)

1. NAME OF TRAVELLER: _____
2. DATE(S) OF TRAVEL PERIOD: _____
3. PLACE OF EMPLOYMENT OR COMMITTEE: _____
4. REASON FOR TRAVEL: _____
-

5. PROJECTED TRAVEL COST DETAILS THAT APPLY:

- | | | |
|--|---|-------|
| a) MILEAGE: _____ kilometers at 55 cents per | = | _____ |
| b) FERRIES: | = | _____ |
| c) MEALS: _____ breakfasts at \$15 max. per | = | _____ |
| _____ lunches at \$20 max. per | = | _____ |
| _____ dinners at \$25 max. per | = | _____ |
| d) ACCOMMODATION: ____ nights at _____ per | = | _____ |
| e) ANY APPLICABLE WAGES/TIME IN LIEU | = | _____ |
| f) PUBLIC TRANSIT | = | _____ |
| g) ANY FEES/PARTICIPATION COSTS | = | _____ |
| h) OTHER (Details - e.g. parking) _____ | | |
| _____ | | |
| _____ | | |
| _____ | = | _____ |
| i) PROJECTED TRAVEL COST TOTAL | = | _____ |
- [sum of items (a) through (h)]

6. PRE-APPROVED BY: _____

Signature: _____

ANY COMMENTS:

TRAVEL EXPENSE CLAIM (please print)
*****attach receipts for all claimed expenses*****

1. ACTUAL TRAVEL COSTS THAT APPLY:

- | | | | |
|--------------------------------------|------------|---|--|
| a) MILEAGE | = | | |
| b) FERRIES | = | | |
| c) MEALS | | | |
| | breakfasts | = | |
| | Lunches | = | |
| | dinners | = | |
| d) ACCOMMODATION | = | | |
| e) ANY APPLICABLE WAGES/TIME IN LIEU | = | | |
| e) PUBLIC TRANSIT | = | | |
| f) ANY FEES/PARTICIPATION COSTS | = | | |
| g) OTHER (details) _____ | | | |
| _____ | | | |
| _____ | | | |
| _____ | = | | |
| h) ACTUAL TRAVEL COST TOTAL | = | | |

2. If "actual travel cost total" above is greater than "projected travel cost total".
5(i) on reverse side - please explain

3. APPROVED FOR PAYMENT BY: _____

Signature: _____

ONCE APPROVED, PLEASE FORWARD TO HIRRA BOOKEEPER FOR PAYMENT

ANY COMMENTS:
