



SUDBURY CATHOLIC DISTRICT SCHOOL BOARD

165A D'YOUVILLE STREET, SUDBURY, ONTARIO P3C 5E7 tel. (705) 673-5620 fax (705) 673-6670

<http://www.scdsb.edu.on.ca>

ADMINISTRATIVE PROCEDURES AND GUIDELINES APG # CS22

TRAVEL AND EXPENSE CLAIMS

PREAMBLE

The Sudbury Catholic District School Board is committed to an organizational culture that operates with integrity and promotes stewardship and accountability with respect to all decisions and practices.

The Sudbury Catholic District School Board will reimburse employees for appropriate and approved travel expenses while performing duties on behalf of the Board.

Guiding Principles

- This policy applies to all Board personnel in their capacity as employees and covers expenditures from all sources of funding.
- Travel expenditures incurred are associated with the employee's duties, support the objectives of the Sudbury Catholic District School Board and provide a benefit to the Board.
- School Board expenditures for travel, meals and accommodation must be reasonable, appropriate and transparent.
- Appropriate accounting procedures, reporting mechanisms and approvals are to be in place to ensure that expenditures are in compliance with established policies and procedures.

References

Education Act

Ministry of Education Guidelines – Memo 2006:B15

Income Tax Act

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GUIDELINE

The board will reimburse individuals for expenditures submitted on a statement of expenses, Travel and Expense Claims, subject to the following parameters:

1. Allowance for Use of Personal Automobile

- a. The allowance paid for the use of a personal automobile is deemed to cover all costs of operation including insurance, depreciation, gas, oil, repairs etc.
- b. The cost of travel from home to the work site is considered a personal expense and is not reimbursable by the board. The board will, however, pay for any incremental kilometres incurred in conducting business as part of an employee's home to work travel.
- c. Individuals will be reimbursed for the use of their personal automobile provided:
 - i. It is the most convenient method of travel;
 - ii. The travel is authorized by a designated authority for board business;
 - iii. Whenever possible, two or more individuals traveling to the same destination use one vehicle.
- d. Individuals must satisfy themselves whether their motor vehicle insurance coverage should include business use of their vehicles. Subject to the provisions of any applicable collective agreement this additional insurance is at the cost of the individual.
- e. The Sudbury Catholic District School Board assumes no financial responsibility for privately owned vehicles other than paying the kilometre rate when used for board business. The Sudbury Catholic District School Board is not responsible for reimbursing deductible amounts related to

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insurance coverage. Individuals driving a personal vehicle on board business cannot make claims to the board for damages as a result of collision or breakdown.

- f. For regular work days, travel will be paid in accordance with travel procedures subject to applicable collective and employment agreements.

2. Other Expenses Incurred on Board Business (i.e. Professional Development or Conferences)

- a. These claims will include, but are not limited to, actual out-of-pocket expenses incurred for:
- i. Courses, conferences or workshop charges;
 - ii. Hotel room charges for accommodation in a standard room – no additional reimbursement will be made for suites, executive floors, or concierge levels;
 - iii. Meals;
 - iv. Reasonable tips and gratuities;
 - v. Business telephone calls;
 - vi. Taxi receipts;
 - vii. Superintendent approved car rental, when a rental vehicle is more economical than the use of a personal vehicle;
 - viii. Public transportation at the lowest fare practicable;
 - ix. Necessary parking fees; and
 - x. Other business expenses (i.e. fax, internet).
- b. All out of province travel requires approval of the Director of Education.
- c. The following will not be reimbursed:
- i. Recreational costs (i.e. fitness facilities, video rentals, mini-bar charges, etc.);
 - ii. Movies;
 - iii. Alcoholic beverages;

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- iv. Charges incurred by any one other than the attendee;
- v. Parking or traffic tickets; and
- vi. Auto expenses (reimbursed per kilometer charge).

d. Meals:

- i. Reasonable and appropriate actual meal expenses will be reimbursed if the expenditure is incurred when the individual is on board business.
- ii. If more than one employee is included in the expense receipt then employee names must be included on the claim form.
- iii. costs must not include reimbursement for any alcoholic beverages.

e. Alternate modes of transportation are recommended where it is cost effective:

- i. use of rental car;
- ii. by bus;
- iii. by train;
- iv. by air.

3. Reporting

- a. Travel and Expense Claim forms are available electronically or at the school board office.
- b. When submitting a statement of expense, the purpose of the trip must be stated in the space provided and the specific budget code to which it is to be charged, as well as sufficient details to explain the expenses. If the expense is to be charged to a specific project and the staff member is unaware of that code, the staff member shall identify the project and the budget holder will apply the code.
- c. The claimant must sign the form and attach all original receipts showing the detail of the expense. Photocopies of receipts, or credit/debit card slips

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are not acceptable, as they do not show sufficient detail to authorize payment or meet audit requirements. Individuals are asked to send in the expense form with the original signatures.

- d. All expense forms will be reviewed and signed by the superintendent prior to their submission to the accounting department. Expense forms will be reviewed and signed approval as follows:
- i. for the Director by the Chair of the Board;
 - ii. for the Chair of the Board by the Vice Chair of the Board;
 - iii. for the Trustees by the Chair of the Board;
 - iv. for the Superintendents by the Director;
 - v. for the Principal/Vice-Principal by the appropriate Superintendent.

Expenses also require, where applicable, approval by the Manager, Principal or Superintendent.

- e. Travel and Expense Claim forms should be submitted monthly to the attention of the accounting department. Payment for kilometres driven will be calculated according to the current rates of the Board.
- f. The superintendent must sign the approval line as the person knowledgeable about the activity and the one who acknowledges that the expenditure complies with this administrative procedure and established practice. Superintendents are also acknowledging their approval of the expense being charged against a budget for which they are responsible.
- g. All amounts paid are subject to budget restrictions set annually by the board and provisions within existing collective agreements.
- h. The Sudbury Catholic District School Board assumes no obligation to reimburse expenses that are not in compliance with this procedure.

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