



Staff and Volunteer Travel Policy

1. PRINCIPLES

- 1.1. This policy is based on the following principles, which are the foundation for the management of travel for staff and volunteers on The Foundation for Student Science and Technology business.
 - 1.1.1. Fairness – staff and volunteers act in a fair and reasonable manner in the management and implementation of the policy, which balances staff and volunteer needs and interests with The Foundation for Student Science and Technology fiscal and operational requirements.
 - 1.1.2. Fiscal responsibility – staff and volunteers make all reasonable efforts to limit expenses, consistent with The Foundation for Student Science and Technology’s status as a charitable organization dependent on sponsor support and volunteer time.
 - 1.1.3. Transparency – ensure the consistent, fair and equitable application of the policy and its practices.

2. PURPOSE AND SCOPE

- 2.1. The purpose of this policy is to ensure fair and reasonable treatment of staff and volunteers required to travel on The Foundation for Student Science and Technology business, consistent with the principles above. The provisions contained in this policy are mandatory and provide for the reimbursement of reasonable actual expenses, not claimable in whole or in part from any other source, necessarily incurred while travelling on The Foundation for Student Science and Technology business and to ensure staff and volunteers are not out of pocket. These provisions do not constitute income or other compensation that would open the way for personal gain.

3. AUTHORIZATION

- 3.1. The Foundation for Student Science and Technology has the responsibility to authorize and determine when organization travel is necessary, and to ensure that all travel arrangements are consistent with the provisions of this policy. Following consultation between the Executive Director (or his/her designate) and the staff or volunteer, The Foundation for Student Science and Technology shall determine travel arrangements that best accommodate the staff or volunteer’s needs and interests and The Foundation for Student Science and Technology’s operational requirements.



4. REIMBURSEMENT CLAIMS AND RECEIPTS

- 4.1. Travellers are expected to submit individual claims for reimbursement using the Foundation for Student Science and Technology Expense Claim Form, supported by original receipts, invoices and tickets or electronic airline tickets, within 30 days of travel. Photocopies of receipts are not normally acceptable.
- 4.2. For frequent travellers, expense claims shall be submitted once per month showing the details of each trip separately.
- 4.3. Where the traveller certifies that the receipt was lost, accidentally destroyed or unobtainable, a personal declaration may replace the receipt with the approval of the Executive Director (or his/her designate).
- 4.4. Expenses resulting from misinterpretations or mistakes are not a basis for reimbursement or non-reimbursement. However, such situations shall be reviewed on a case-by-case basis.

5. RESPONSIBILITIES

- 5.1. The Executive Director or his/her designate, in consultation with the staff or volunteer shall:
 - 5.1.1. determine whether travel is necessary
 - 5.1.2. ensure that travel arrangements are consistent with the provisions of this policy
 - 5.1.3. authorize travel, including blanket travel authority
 - 5.1.4. verify and approve travel expense claims before reimbursement
- 5.2. The traveller shall:
 - 5.2.1. become familiar with the provisions of this policy
 - 5.2.2. consult and obtain authorization including blanket travel authority, where applicable, to travel in accordance with the policy;
 - 5.2.3. inform the organization of his/her needs that may require accommodation;
 - 5.2.4. complete and submit travel expense claims with necessary supporting documentation as soon as possible after the completion of the travel.
 - 5.2.5. be responsible for cancelling reservations as required, safeguarding travel advances and funds provided, and making outstanding remittances promptly.

6. TRANSPORTATION

- 6.1. The selection of the mode of transportation shall be based on cost, duration, convenience, safety and practicality. Expenses associated with the selected mode of



transportation shall be reimbursed based on receipts. Such expenses include: seat selection fee; airport improvement fees, not otherwise paid (e.g., prepaid as part of the fare); airport departure tax, not otherwise paid; excess baggage/excess weight for commercial, private and/or chartered carriers (written explanation also required); public carrier ticket "change fee" for legitimate authorized The Foundation for Student Science and Technology purposes; and legitimate, mandatory transportation service charges and fees, incurred while travelling, not otherwise paid (e.g., docking fees, road/bridge tolls, ferries and other transportation service charges/fees).

6.2. Commercial

- 6.2.1. Where commercial transportation is authorized and used, the traveller shall be provided with the necessary prepaid tickets whenever possible.
- 6.2.2. The standard for air travel is economy class. The lowest available airfares appropriate to particular itineraries shall be sought and bookings shall be made as far in advance as possible.
- 6.2.3. The standard for rail travel is economy class (e.g., VIA Rail Comfort).
- 6.2.4. Taxis, shuttles and local transportation services are alternatives for short local trips. Actual expenses, including gratuities, shall be reimbursed.

6.3. Rental and Private Vehicles

- 6.3.1. The standard for rental vehicles is mid-size. Rental vehicles beyond the standard shall be authorized based upon factors such as, but not limited to, the number of additional passengers to accommodate, safety, and the bulk or weight of goods transported.
- 6.3.2. Credit card sales slips may be used to support claims for gas used for rental cars.
- 6.3.3. Use of private automobiles should be limited to those trips where no suitable public transportation is available or where a private automobile is more economical considering all costs and time availability.
- 6.3.4. The kilometric rates payable for the use of privately owned vehicles driven on authorized The Foundation for Student Science and Technology travel are prescribed in Appendix A. Travellers shall claim only for distances necessarily driven on The Foundation for Student Science and Technology travel.
- 6.3.5. Travellers who are driven to or picked up from a public carrier terminal shall be reimbursed the kilometric rate based on the distance to and from the public carrier terminal for each round trip.
- 6.3.6. Parking charges shall be reimbursed where it is practical and economical to leave a private vehicle at the public carrier's terminal during the period of absence.



6.4. Vehicle Insurance

- 6.4.1. Collision damage waiver coverage for the entire period that a vehicle is rented is required. This coverage is included when travellers use an individual designated The Foundation for Student Science and Technology credit card and shall be reimbursed in circumstances where an individual designated credit card is not used.
- 6.4.2. The Foundation for Student Science and Technology assumes no financial responsibility for privately owned vehicles other than paying the kilometric rate. The Foundation for Student Science and Technology is not responsible for reimbursing deductible amounts related to insurance coverage.
- 6.4.3. Privately owned vehicles used on The Foundation for Student Science and Technology travel shall have at least the minimum provincial/territorial/state/country insurance coverage of public liability and property damage. If a private automobile is used on approved The Foundation for Student Science and Technology business, a minimum of \$2,000,000 third party liability coverage is recommended. The staff or volunteer shall pay any costs of arranging this business-use coverage.
- 6.4.4. Travellers who intend to carry passengers are advised to confirm with their insurance agent that they are adequately insured.

7. ACCOMMODATION

- 7.1. Reimbursement for overnight accommodation within 40 km of a staff or volunteer's home shall not normally be authorized.
- 7.2. The standard for accommodation is a single room, in a safe environment, conveniently located and comfortably equipped. Generally this includes hotels, motels, university/college residences, and government and institutional accommodation. Shared accommodation is encouraged.
- 7.3. Unless The Foundation for Student Science and Technology authorizes otherwise, when travel is related to activities held in an institution, the staff or volunteer shall stay in institutional accommodations.
- 7.4. The Foundation for Student Science and Technology shall not reimburse claims for unused reservations.

8. MEALS

- 8.1. A traveller shall be reimbursed for actual meal expenses, up to the applicable meal allowance, for each breakfast, lunch and dinner while travelling. Meal allowances are specified in Appendix A.



- 8.2. Reimbursement shall not be paid to a traveller with respect to a meal that is provided. In exceptional situations where a traveller has incurred out-of-pocket expenses to supplement meals provided, the actual incurred costs may be reimbursed, based on receipts, up to the applicable meal allowance.
- 8.3. Reimbursement for alcoholic beverages is not normally authorized.
- 8.4. Where a traveller incurs meal costs that are higher than the established meal allowances in situations outside the traveller's control, the actual and reasonable expenses incurred shall be reimbursed, based on receipts.
- 8.5. Breakfast may be claimed if the first day of travel begins before 6:30 a.m. Dinner may be claimed if the last day of travel ends after 6:30 p.m.

9. OTHER BUSINESS EXPENSE

- 9.1. Staff shall be reimbursed for The Foundation for Student Science and Technology-related business expenses not otherwise covered, such as business calls, photocopies, word-processing service, faxes, internet connections, rental and transportation of necessary office equipment and transportation of required personal effects.
- 9.2. Staff shall also be reimbursed for service charges/fees for actual and reasonable expenses for financial transactions such as but not limited to Automated Banking Machine use; The Foundation for Student Science and Technology travel card use; credit/debit card use; financial institution foreign currency transaction commission(s); traveller's cheques acquisition; and cheque-cashing fees.
- 9.3. Volunteers may be reimbursed for The Foundation for Student Science and Technology-related business expenses not otherwise covered, subject to prior authorization.

10. TRAVEL ADVANCES

- 10.1. Staff or volunteers on The Foundation for Student Science and Technology travel may be provided with a travel advance to cover travel expenses where services and products are not prepaid or cannot be paid with an individual designated The Foundation for Student Science and Technology credit card. Travel advances are normally reserved for program-related travel outside Canada.

11. CURRENCY EXCHANGE

- 11.1. The costs incurred to convert reasonable sums to foreign currencies and/or reconvert any unused balance to Canadian currency shall be reimbursed, based upon receipts, from all transactions and sources.



APPENDIX A

Kilometric Rates

The rates payable in cents per kilometre for the use of privately owned vehicles driven on authorized The Foundation for Student Science and Technology travel are calculated at 80% of the allowance prescribed for Ontario by the Treasury Board of Canada Secretariat, Travel Directive, Appendix B. The rate is updated annually, effective the first day of January. The Foundation for Student Science and Technology Expense Claim Form shall be updated accordingly.

Effective October 1, 2014

46.0 cents per kilometre (taxes included)

Meal Allowances

The maximum allowance claimable for reimbursement for meals on authorized The Foundation for Student Science and Technology travel is calculated at 75% of the allowance prescribed by the Treasury Board of Canada Secretariat, Travel Directive, Appendix C. The rate is updated each year, effective the first day of January.

Effective October 1, 2014 (taxes included)

Allowances (CAD\$)	Canada & USA*
Breakfast	11.80
Lunch	12.25
Dinner	31.65

References

Treasury Board of Canada Secretariat, Travel Directive, Appendix B:
<http://www.njc-cnm.gc.ca/directive/index.php?sid=97&svid=1&lang=eng>

Treasury Board of Canada Secretariat, Travel Directive, Appendix C
<http://www.njc-cnm.gc.ca/directive/index.php?sid=98&lang=eng>

The Foundation for
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La Fondation pour les
**ÉTUDIANTS EN
TECHNOLOGIE ET SCIENCES**

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