

**Travel and Expense Policy T-088-20**

Effective Date:
March 25, 2020

Part 1 Purpose

It is the policy of the Municipality of the District of Yarmouth to reimburse employees and elected officials who are required to travel on municipal business. The rates for reimbursement are as set out in Appendix A and may be adjusted from time to time as considered necessary.

Part 2 Application

This policy applies to all elected officials, employees and volunteers of the Municipality who are travelling on behalf of the Municipality.

Part 3 Policy Directives

Any person authorized to travel for the benefit of the Municipality is expected to travel by the most direct route and use the most economical means of transportation, taking into consideration the travel time involved. Whenever possible, employees shall use departmental vehicles for travel.

The Municipality will provide reimbursement of appropriate and reasonable expenses for transportation, meals, accommodation and other disbursements incurred for such travel, in accordance with the guidelines herein. (Excluding alcoholic beverages).

Expenses on mileage incurred while traveling on behalf of a commission or authority shall be reimbursed by the outside body, not the Municipality of the District of Yarmouth.

There shall be no reimbursement to Councillors for travel within the Municipality as such travel is deemed to be included in the portion of the Council member's salary or remuneration that is an allowance for expenses incidental to the discharge of duties. (As per the Income Tax Act of Canada)

Part 4 Event Registration

Elected officials and employees will be responsible for event registration.

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Elected officials or employees who register for conferences, courses, seminars or municipally related activities that result in fees/costs and do not attend shall be responsible for any and all costs incurred by the Municipality, except if attendance was not possible for any of the following reasons:

- Illness (personal or immediate family)
- Weather conditions
- Travel emergencies
- Municipal emergencies
- Other reasons as approved by Municipal Council

Part 5 Employees travelling for work purposes

Employees travelling for municipal business are considered to be at work. Regardless of the time the employee chooses to leave, they shall be considered as having left at the appropriate time. (For example: for a meeting in Halifax the following morning, an employee would be expected to leave after lunch. If an employee chooses to leave earlier, they will be expected to use vacation leave. If an employee chooses to leave after work, they will not accumulate overtime.) Travel on a Sunday for a Monday morning meeting will be compensated at straight time with time in lieu. Travel times will be subject to weather conditions at the discretion of the CAO.

Part 6 Methods of Transportation

- 6.1 Private Automobiles** - Whenever possible employees/elected officials are expected to travel by the most direct route and use the most economical means of transportation, taking into consideration the travel time involved and working schedule. Travel expenses will be paid, when personal vehicles are used for Municipal business, at a rate set by Council which shall be no less than as that set by the Province of Nova Scotia. The expense will be paid at a straight kilometer rate, with the rate being reviewed periodically by Council. In addition to the kilometer allowance, an individual traveling on municipal business may claim the actual expenses incurred for ferry charges and parking (receipts required), and bridge/road tolls. Two or more persons traveling during the same time period to the same destination shall car pool to the greatest extent appropriate or practical in the circumstances.



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Employees and elected officials should not claim any mileage for personal use while on travel status.

INSURANCE - The Municipality does not accept any liability under any circumstances for claims arising from the use of privately owned automobile(s). Persons(s) using privately owned automobile(s) for municipal business travel are responsible for ensuring the automobile(s) is properly insured for such use and is in compliance with all relevant statutory requirements.

6.2 Air - On business trips for which air travel is the most economical, timely and effective means of transportation, economy air fare shall be booked in advance by the employee or elected official to obtain discount seats. Additional accommodation and meal expenses are permitted when more extensively discounted air fares are available which require an earlier departure and/or return date (e.g. weekend) and the additional discount more than offsets the other additional travel expenses. When air travel is the most economical, timely and effective means of transportation, employees choosing to use a private automobile must travel on their own time, except to the extent of work time that would have otherwise been devoted to air travel. Reimbursement shall not exceed the cost of the least expensive air fare available.

6.3 Automobile Rentals - Rental vehicles are available for a person or persons traveling on Municipal business. The Municipality will pay the daily rental, gasoline and kilometer charges invoiced by the rental agency, as applicable. Rental agreements have been made with specific companies, and individuals requiring a rental shall check with the Municipal office prior to making arrangements.

Part 7 Accommodation, Meal Allowance & Incidental Expenses

7.1 Accommodations - Employees/elected officials are expected to participate in the Union of Nova Scotia Municipality's agreed Hotel Room Rate Program. The government rate should be requested at the time of booking and be confirmed prior to being billed. Accommodations for elected officials may be booked through the Municipal or Department office using the Hotel Reservation Request Form (Appendix B). Cancellations for hotel reservations are the responsibility of the elected official or employee. If any charges are



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incurred due to late cancellation, these will be the responsibility of the elected official or employee, unless cancellation was due to the following reasons:

- Illness (personal or immediate family)
- Weather conditions
- Travel emergencies
- Municipal emergencies
- Other reasons as approved by municipal council

An employee/elected official who makes private arrangements for overnight accommodations while traveling on municipal business may be reimbursed at a rate of \$25.00 per night in lieu of hotel arrangements, subject to the approval of the CAO.

7.2 Meal allowances & Incidentals – Meal allowances will be provided on a per diem basis when elected officials and employees are travelling on Municipal business. The meal allowance for breakfast may be claimed only when the claimant has been travelling on Municipal business for more than 1 hour before the recognized time of the start of the work day (travel before 7:30 am). The meal allowance for dinner may be claimed only when the claimant is not expected to return to his or her residence before 6:30 pm. Meal allowances may not be claimed in situations where a meal was provided as part of the event registration or method of travel.

Allowances will be paid as follows (amounts include tip and taxes):

- Breakfast \$20.00
- Lunch \$20.00
- Dinner \$35.00
- Incidentals \$10.00

In situations where the claimant has no option other than going over the allowances (breakfast at a hotel that goes over \$20, set meal price at an event that goes over the lunch or dinner allowances), a receipt must be kept and attached to the expense claim. The claimant should keep both the detailed receipt and the debit machine receipt.



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Incidentals – Incidental expenses may be claimed on overnight travel for miscellaneous and out-of-pocket expenses such as bridge tolls, long distance calls, or tips not related to a meal expense.

7.3 Business Meeting, Exhibits & Trade Shows - Reimbursement will be provided for reasonable expenses incurred for room and equipment rentals, fees, business meals, gratuities and other related service costs to facilitate the conduct of municipal business programs.

7.4 Other Expenses - Extraordinary expenses may be considered for reimbursement upon proof of receipts and approval by Council

Part 8 Travel Advances and Claims Procedures

8.1 Travel Advances - Cash advances are available on request to cover the anticipated expenses of an authorized business trip. Within (30) days of the completion of a business trip for which a travel advance was made, the employee/elected official must account for the advance by submitting a travel expense claim for allowable expenses and by remitting any balance in excess of the expenses actually incurred and claimed. If the advance has not been accounted for within the prescribed time limit, the CAO may deduct the balance owing to the Municipality from any sum of money that may be due and payable by the Municipality to that employee/elected official.

8.2 Travel Claims Procedures - Claims for reimbursement of travel expenses shall be submitted on the forms prescribed by the Municipality, detailing the expenses incurred. The following expenses shall be supported by vouchers or receipts that must be attached to the travel expense claim form:

- commercial transportation (air fare, ferry charges, train tickets)
- hotel, motel, inn and bed & breakfast accommodations;
- automobile rentals;
- taxis;
- parking expenses;
- business meeting, exhibition and or trade fair costs;
- necessary expenditures for operation of municipal vehicles

All travel claims must be signed by the person making the claim and be approved for payment by the CAO.



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Part 9 Spouse/Partner Cost

If the spouse/partner of an elected official or employee accompanies the individual while on municipal business, all additional costs incurred shall be at the expense of the individual.

Part 10 Policy review

No later than January 31st following an election year, Council shall formally review this policy by way of motion, to ensure that the contents of the policy are in accordance with provincial legislation and best practices.

Chief Administrative Officer's Annotation for Official Policy Book	
Date of Notice to Council members of Intent to Consider (7 days Min)	March 12, 2020
Date of Passage of current Policy	March 25, 2020
I certify that this Travel and Expense Policy T-088-20 was adopted by Council as indicated above.	
 _____ Chief Administrative Officer	<u>April 6, 2020</u> Date

Date last reviewed: March 25, 2020
Date last amended: March 25, 2020



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Appendix B



Councillor Hotel Reservation Request Form

Name	Dates (inclusive)	Bed size <u>preference</u> (king/queen/dbl beds)	If parking is available is it required?	# of people in room	Hotel <u>preference</u>

PLEASE BE REMINDED THAT COUNCILLORS ARE RESPONSIBLE FOR HOTEL CANCELLATIONS AS WELL AS CONFERENCE/FUNCTION REGISTRATIONS.

Office use only
Confirmation # _____

Hotel Reservation Request Form