



## Travel Policy

Policy owner:	Vice-President Operations and Finance
Audience:	URSU Staff, Members
Approved:	Board of Director's Meeting, June 18, 2019
Last Reviewed:	May 14, 2019
Review Schedule:	August 2020

### 1. Introduction

This policy is designed to provide a consistent structure for managing travel related activities of the organization. It provides guidelines for how to plan trips and how to manage associated expenses. It also outlines what sort of travel costs may be reimbursed and to what extent they may be reimbursed.

### 2. Definitions

- **URSU** – The Students' Union of the University of Regina Inc.
- **Sundries** - toiletries, newspapers, laundry, etc.

### 3. Policy

#### *3.1. Criteria for travel authorization*

All travel authorized must be for the purpose of URSU business. It must also respect the following criteria;

1. Board travel must be authorized by a majority vote of the Board of Directors. All board travel shall be deemed to be of material or promotional interest to URSU.
2. Executives and Employees of URSU are authorized for budgeted travel and must receive the prior authorization of the Vice-President Operations and Finance or the General Manager. Unbudgeted travel must receive prior approval from the Board of Directors.

#### *3.2. Rules Governing Travel Expenses*

The following rules apply when travelling on behalf of the Union;

1. A complete accounting of any trip made by any Executive shall be kept and made available upon request by any of the other Executive or the Board of Directors.
2. URSU shall only reimburse costs for sundry items and essential medical/accessibility items in the case of extenuating circumstance or need (i.e. lost luggage) upon approval post travel by any two of the President, VP Operations Finance, Accounting Manager, or General Manager.



### ***3.3. Meals***

The per diem rates for meals while traveling shall be the daily “meal allowance total” as posted on Canada Revenue Agency’s Travel Directive which can be found at:

<https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/travel-directive/appendix-c-meals-allowances-april-2019.html>

Per diems represent the maximum allowable reimbursement for meal expenses. There shall be no breakfast/lunch/dinner breakdown of the daily allowance. Application/distribution of the daily allowance shall be at the discretion of the traveler. Original receipts must accompany all reimbursement requests or credit card reconciliations.

Unused per diem amounts cannot be accumulated or carried forward to other meals or days.

Daily meal expenditures that are in excess of the maximum allowable will be recognized only if supported by original receipts and reimbursed at the discretion of the General Manager. Such additional expenses must be reported to the Board of Directors. Per diem reimbursement may only be claimed if no other organization is providing the traveler a per diem or meal allowance.

### ***3.4. Emergency Assistance***

Depending on the situation there are a multitude of ways travellers can receive assistance. URSU is committed to providing any URSU executive, director or staff member with full assistance and support while travelling for URSU sanctioned business. Travellers requiring any emergency assistance should contact any Executive Member or the General Manager.

### ***3.5. Advance support***

URSU appreciates that not all URSU members may have access to a personal credit card or sufficient personal cash resources for the purpose of paying for travel related expenses. In such an event the traveller may make a request for a cash advance to cover incidental expenses. Granting of such an advance is at the sole discretion of the General Manager. Remaining cash from any advance along with receipts for all expenditures must be returned to URSU within seven days of return from trip.

### ***3.6. Accommodations***

The traveler is expected to seek hotel accommodations that are comfortable, convenient, meet business and personal needs, and offer good value. When appropriate and applicable, representatives of URSU shall stay in accommodations provided by the host organization. If members stay with a host friend/family or in a non-commercial venue, they may reimburse the hosts up to \$50/night for expenses incurred (no receipt required).

Corporate hotels/motels shall be the preferred choice for accommodations. Alternatives such as B & B, Airbnb and VRBO may be considered in certain situations, Requests for such alternative accommodation is subject to prior approval by the General Manager.



Accommodation reservations for other than conference host hotels must be made on behalf of the traveler by the Administrative Coordinator or designate.

### ***3.7. Air Travel***

When booking airfare, coach or economy class is to be used unless special discount fares are offered that are below coach or economy fare. Any other class of fare must be approved by the Executive Committee and be reported to the Board of Directors if it makes the trip more expensive. Air travel reservations must be made on behalf of the traveler by the Administrative Coordinator or designate.

### ***3.8. Land Travel***

#### Private Vehicles

Land travel when traveling by personal car shall be reimbursed at the most current rate per kilometer as posted on Canada Revenue Agency's Travel Directive up to a maximum of 1500 kilometers. The most current rate can be found at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/travel-directive/appendix-b-cra-kilometric-rates-april-2019.html>

#### Taxis/Lift Services/Public Transportation

Taxi services or suitable public transportation (subways, monorails, buses, etc.) are encouraged as the main modes of transportation. Receipts must be provided.

Taxi charges are allowed between an employee's home and the airport and for fares incurred on URSU business away from home. If the traveler has used their own vehicle or uses a rental vehicle, reimbursement will not be made for any cab fares.

#### Car Rentals

The standard for rental vehicles is mid-size, without any added options. Car rental reservations must be made on behalf of the traveler by the Administrative Coordinator or designate. Car rentals and related expenses shall not exceed budgeted approval, including daily rental, gas, and kilometer charge. URSU will not reimburse any optional insurance offered by car rental companies as URSU's insurance provides the necessary coverage for business use. All optional insurance coverage with the car rental company should be declined.

In the event that one or more representatives of URSU are traveling to the same meeting by ground travel, only one person per vehicle that is being reimbursed shall claim travel costs.

#### Parking

Parking charges incurred for business purposes shall be reimbursed. The most inexpensive parking option should be used wherever possible.

### ***3.9. Entertainment***

Allowable expenses include invitation costs, food and beverage, catering, service charges, equipment, entertainment, and local transportation for guest to/from events.

Alcohol will not be reimbursed if only URSU executive, directors or staff are present.



All claims for reimbursement must be supported by original itemized receipts in the amount for which reimbursement is expected.

### **3.10. Reporting**

Any Executive traveling to a conference, networking or training event must provide a full report of the experience to the Board of Directors. This shall typically be done by creating a written document and forwarding it to the Board. If the member wishes they can also present the report to the Board of Directors at a regularly scheduled meeting. The report shall include the following;

1. the purpose, location and length of the conference/meeting, including dates
2. the activities of the conference/meeting, including what activities the traveler attended and contributed to, and what speakers, or organizations presented at the conference/meeting
3. specific examples of skills, knowledge, or information the traveler gained
4. recommendations for future attendance at the same or similar meetings
5. a detailed itemization of any costs incurred to URSU
6. if possible; photos, quotes, resources and other media that can be used to create a blog post for the URSU website

## **4. Roles and Responsibilities**

Travelers funded by URSU shall;

- accurately complete reports
- avoid over-spending and where deemed necessary provide a detailed explanation to the Executive Committee or the Board of Directors
- adhere to the URSU Travel Policy in its entirety

## **5. Consequences for Noncompliance**

If members fail to abide by the travel policy (including failing to create acceptable reports) or incur travel expenses that are deemed unreasonable by the Executive Committee or the Board of Directors, then the traveller may not be reimbursed for those expenses.