

**FRONTIER SCHOOL DIVISION**

# **Staff Travel Guidelines**



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This document is available in alternate formats upon request.

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## **INTRODUCTION**

Geographically, Frontier School Division is the largest school division in the province of Manitoba. In order for staff to perform their duties travel may be required.

The following guidelines encompass all travel requirements, and outline the most economical, fair and equitable approach to expenses for travel.

## **RATIONALE**

These guidelines will outline travel requirements, clarify appropriate expenses and provide reimbursement procedures. Travel expenses should be:

- reasonable,
- necessary,
- related to Division business,
- transparent.

Extenuating circumstances can and do arise in a Division of this size. No two communities are the same in terms of geography, distance, and factors associated with performing Division business. Consideration of these extenuating circumstances will be reviewed by the appropriate supervisor and staff member on a case-by-case basis.

These guidelines serve as a resource document to Division Policy D.3.D – Travel Expenses. This document will be reviewed annually by the Finance Committee sub-committee of the Board of Trustees, the full Board, and the Secretary-Treasurer's department to ensure relevance and consistency of application.

## **AUTHORIZATIONS, APPROVALS, DOCUMENTATION AND SUBMISSIONS**

The most economical and reasonable means of transportation must be used for all travel arrangements. It is imperative employees request and receive approval for any potential travel expenses. Reimbursement may not be granted for expenses incurred without approval.

The Division's primary method of payment for travel expenses is a Division-issued Corporate Card. Employees should use this card as method for payment whenever possible. Some establishments may not accept Visa in which case they may invoice the Division directly. Should an employee be required to utilize personal funds, they are to complete an expense claim.

Expense claims must be supported with receipts and itineraries, have the approval of a supervisor and be submitted to the Accounting Department within thirty days of the incurred expense. No individual may authorize reimbursement of his or her own travel expenses.

## **CORPORATE CARDS**

Corporate cards are issued to employees based upon their requirement for travel. Corporate cards are assigned a credit limit based upon the employee's role and the type and amount of travel required. Corporate cards are to be used for travel related expenditures incurred in relation to Division duties as well as small incidental expenditures for which you have prior approval from your supervisor.

Each month employees are required to reconcile their statement by providing budget codes and attaching receipts to their statement. The corporate card charge slip is not sufficient support for expenditure. It is preferable to have the detailed original-dated receipts. An airline itinerary or original airline ticket should be kept and attached to the request. Employees are required to submit the reconciled statement to their supervisor for their approval.

Employees submit their corporate card reports to the Division Office Accounting Department prior to the indicated deadline. Individuals who fail to complete three consecutive monthly corporate card reports will have their card suspended.

## TRAVEL BY AIR

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These guidelines are applicable to employees travelling by air on official business which includes travel to conferences, seminars and other professional development programs.

### a. **Booking Requirements**

Employees should become aware of the different advanced booking requirements for different airlines and different destinations. Employees are responsible to ensure any cost savings opportunities associated with advance requirements are realized.

Employees are expected to consider all potential savings opportunities such as driving versus flying or fares with restrictions which may involve penalties for changes. For example:

- potential savings for an additional night stay which outweighs the incremental cost of lodging and meals,
- the possibility of holding the meeting by conference call or video conference, or
- combining multiple journeys into one trip.

Division and/or Area office staff can assist individuals with reviewing, selecting and advance booking flights for travel.

### b. **Travel Agencies**

Discuss your travel requirement needs with your supervisor prior to contacting a travel agency. In circumstances where the supervisor feels the use of a travel consultant is required, the Division will cover the fee associated with the use of this service. **Please note the Division will not cover the fee associated with the use of a travel agency for travel within the country.**

### c. **Receipts**

Employees should request a copy of their itinerary or receipt as this documentation must be attached to the corporate card statement or expense claim form as verification of travel.

### d. **Extenuating Circumstances**

Extenuating circumstances such as family emergency, poor weather conditions or illness may warrant a change in an employee's flight arrangements once the ticket has already been booked. In such circumstances, the Division will cover expenses associated with the change to flight arrangements.

## **TRAVEL BY ROAD**

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The most cost effective, safe and efficient method of transportation is to be used. Employees operating a vehicle while on Division business must:

- have a valid Province of Manitoba drivers' license,
- have a valid vehicle registration,
- adhere to the traffic laws of any jurisdiction, and shall be personally responsible for any fines or other sanctions resulting from their violation,
- not operate a vehicle if under the influence of drugs or alcohol.

### **a. Pool Vehicles**

Some Division departments and/or Area offices have pool vehicles available for staff use. Employees are encouraged to contact the Area Administrative Officer or appropriate Division departmental staff at their destination to inquire about the availability of an office pool vehicle.

Area and Division departments which have pool vehicles are responsible for maintaining a record of pool vehicles available and assisting employees in securing a booking for their travel needs. Pool vehicle records should include the date, time, location and reason for the trip, as well as accounting codes for payment.

The Division encourages staff to explore the option of carpooling for employees travelling to the same destination.

### **b. Rental Vehicles**

If a pool vehicle is not available employees may rent a vehicle which is appropriate for the area of travel. Staff should discuss specific vehicle travel requirements with their supervisor and/or Area Superintendent and obtain approval for any vehicle rental.

Comparison between different dealers should take place prior to any rental.

#### **i. Insurance**

Employees should be aware the insurance provided by our corporate card covers loss/damages up to the cash value of the rental vehicle to a maximum of \$65,000. There is no coverage for the other party if the Division is found to be at fault. The corporate card does not provide any liability coverage.

In order to ensure there is adequate coverage when renting a vehicle, staff must purchase a Rental Car Insurance Policy through Manitoba Public Insurance. The policy can be purchased through local insurance brokers. The policy provides coverage up to a maximum of \$100,000 for repairs and \$5,000,000 in liability coverage. The liability coverage covers the cost of repairs to another vehicle involved in the accident as well as coverage in the event of any legal action.

**c. Personal Vehicles**

The use of a personal vehicle for conducting school or Division business depends upon many factors including location of work sites, nature of employee's position and/or emergencies. It is important to obtain approval from your supervisor before using a personal vehicle for business purposes.

**i. Reimbursement**

Reimbursement for use of a personal vehicle is based on the most economical method of travel. For example, when travel by air is more cost effective than travel by automobile, employees will receive reimbursement based on the air fare. The rate used for mileage reimbursement is based upon the employee's home community. For example, a staff member from Falcon Beach travelling to Brochet receives reimbursement based upon the South rate.

Frontier School Division will reimburse kilometers for use of personal vehicles based on the current Division Policy D.3.D - Travel Expenses.

Employees will not be reimbursed for daily travel between their residence and work site.

**ii. Transportation of Students**

The preferred method for the transportation of students is a school bus or other Division vehicle. On occasion an employee may be required to utilize their vehicle due to an emergency or the number of students on a trip does not warrant the use of a bus. With the exception of an emergency, written permission from the parent should always be obtained prior to transporting a student.

**iii. Vehicle Deductibles**

If an employee is involved in a car accident while using their vehicle for Division business, the Division may pay the person's vehicle deductible. This should be discussed with the employee's supervisor.

**d. Accidents**

If an employee is involved in an accident while operating a vehicle, they should contact Manitoba Public Insurance Corporation and the Secretary-Treasurer's Department within twenty-four hours, or as soon as possible, after the accident.

## **ACCOMMODATIONS**

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Employees should consider convenience and their safety when selecting accommodations.

### **a. Hotels**

The Division recognizes hotel rates may vary, depending on location. The most economical and practical accommodation alternative should be used when making a hotel reservation.

When the Division designates a hotel for a certain function, employees will be required to take advantage of these arrangements.

Employees staying in Winnipeg should take advantage of the Division-negotiated corporate rate. The current preferred hotel is the Canad Inns. Employees will be required to identify that they are FSD. Please contact the Secretary-Treasurer's department in the Winnipeg office for this information.

In order to offset hotel room costs, it is recommended staff share a hotel room. Employees staying in the hotel for additional nights are required to pay the hotel directly upon check out. Employees are responsible for their incidentals, such as personal phone calls, in-house movies, etc. The Division will invoice employees for any additional expenses such as damages or cleaning charged by the hotel.

### **b. Private Residence**

Employees wishing to stay at a private residence instead of a hotel may claim a "payment in lieu of" hotel as per Division Policy D.3.D. To be eligible, the employee must be travelling on behalf of the Division and require overnight accommodation.

Claims must be submitted monthly indicating the function attended utilizing the standard Division expense claim form. Staff are reminded that all claims are paid on the principle of travel by "most economical means".

## **MEALS**

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The Division meal allowance outlined in Regulation D.3.D – Travel Expenses are the guidelines for incurred meal expenses.

Supervisors have the discretion of reimbursing employees the meal allowance rates in place of actual meal expenditures either prior to or after occurrence.

**a. Payment of Expense/Meal Allowance**

Employees must complete the “Statement of Expense” form to claim these amounts. This form is available on the Division website. Expense claims must be approved by the employee’s supervisor within thirty days of the incurred expenses.

**b. Meals Charged to a Corporate Card**

Staff assigned corporate cards are expected to use their card for payment of their meals. Meal expenditures must be supported by an actual receipt with an itemized listing of purchases. When a receipt covers meals for more than one person, each employee’s name and purpose of meal should be indicated on the statement.

Incidental food costs (snacks, groceries etc. purchased in place of meals) will be reimbursed at the discretion of a supervisor.

## **MISCELLANEOUS EXPENSES**

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The Division will cover business-related expenses incurred while conducting Division business. For example, the following expenses, with appropriate receipts, will be covered:

- local or long distance telephone calls,
- photocopying,
- purchase of supplies,
- faxes,
- internet,
- parking, and
- taxis.