



COMMISSION SCOLAIRE
Eastern Shores
SCHOOL BOARD

TRAVEL POLICY

ES - 233

Adopted
04-08-1999
Amended:
11-12-2002
12-12-2018
23-02-2022
22-06-2022

Resolution
C99-08-020

C02-12-091
C18-12-311
C22-02-831
C22-06-785

Table of Contents

| | |
|--|----|
| 1. PURPOSE OF THE POLICY | 3 |
| 2. APPLICATION OF THE POLICY..... | 3 |
| 3. TRAVEL PRE-AUTHORIZATION AND REPORT..... | 3 |
| 4. REIMBURSABLE EXPENSES | 4 |
| 4.1. Transportation..... | 4 |
| 4.1.1. Modes of acceptable transportation..... | 4 |
| 4.1.2 Group travelling | 5 |
| 4.1.3 Carpooling..... | 5 |
| 4.2 Meals..... | 5 |
| 4.3 Accommodations | 6 |
| 5 DEROGATION..... | 7 |
| 6. TERMS OF REIMBURSEMENT | 7 |
| 7. POLICY REVIEW..... | 7 |
| 8. EFFECTIVE DATE..... | 7 |
| Appendix A – Authorization to Travel..... | 8 |
| APPENDIX B - Travel Advance Form | 9 |
| APPENDIX C - Travel Expense Claim Form..... | 10 |

1. PURPOSE OF THE POLICY

- 1.1. To provide an equitable and ethical framework for administering the public funds at the disposal of the school board;
- 1.2. To encourage employees to choose the most practical and/or the least expensive way of travelling
- 1.3. To reimburse employees equitably for travel expenses incurred during the course of their functions on behalf of the Eastern Shores School Board.

2. APPLICATION OF THE POLICY

- 2.1 This policy applies to all ESSB employees and commissioners and will be effective upon its approval.

3. TRAVEL PRE-AUTHORIZATION AND REPORT

- 3.1. At least one week prior to each scheduled trip, the **AUTHORIZATION TO TRAVEL form (Appendix A)** must be completed and approved for any travel that requires an overnight stay:
 - 3.1.1. By the immediate supervisor and the Director, for teachers, support personnel or professionals, who requested the travel;
 - 3.1.2. By the Assistant Director General for school and centre administrators;
 - 3.1.3. By the Director General for all travel requests by senior board management staff.
 - 3.1.4. By the Chair for all travel requests by the Director General.
- 3.2. The agenda of the meeting or workshop **must, if available**, accompany all authorization requests.
- 3.3. Regular travel of employees, that is part of their regular work day, does not require written authorization if requested by the immediate supervisor.
- 3.4. In emergency situations, and at the request of their immediate supervisor, the **AUTHORIZATION TO TRAVEL** form does not need to be completed.

4. REIMBURSABLE EXPENSES

4.1. Transportation

4.1.1. Modes of acceptable transportation

When choosing a mode of transportation, the most practical and economical mode of transportation should be favored.

Air Travel: Air travel is permitted when it is the most practical and economical way to travel. Choose the lowest fare available when purchasing a ticket.

Travel in business class must have prior approval by the director general, in limited circumstances such as:

- on international flights; and
- on flights within Canada and the USA if related to the provision of reasonable accommodation (e.g., health reasons).

Rail Travel: Rail travel is permitted when it is the most practical and economical way to travel. Choose the lowest fare available when purchasing a ticket.

Travel in business class must have prior approval by the director general in limited circumstances such as:

- the need to work with a team;
- choosing a travel time that allows you to reduce expenditures on meals or accommodation;
- accommodation requirements; and
- health and safety considerations.

Road Travel: When driving is the most practical, economical way to travel, the following choices are available:

- Board vehicle;
- rental vehicle; or
- personal vehicle.

Choosing the Appropriate Vehicle: The use of any vehicle must be discussed in advance with your approver. Provide and document the rationale for using a particular type of vehicle. The most practical and economical option should be selected.

The School Board will refund travel expenses in accordance with section 8(a) of the [Directive sur les frais remboursable lors d'un déplacement et autres frais inhérents](#) from the Conseil du trésor taking the following points into consideration.

- The point of departure is the scheduled place of employment or the place of residence in the case of a commissioner.
- Distances to and from meeting destination should be calculated using Google maps and a print out of the itinerary must be attached to travel form.
- Travelers shall use the most direct, safe and practical road routes and shall claim only for distances driven for school board travel.
- Parking, tolls and taxi fees will be reimbursed upon receipt of supporting vouchers.
- Local travel is generally considered to be part of the employee's job and will not be reimbursed (12 km return or less).
- Alternate transportation services offered within the Montreal area should be encouraged as they offer flat rates, which can often times, be less expensive than taxis.

4.1.2 Group travelling

When many employees must travel to a planned activity (such as ESMC, RSEQ, PD days organized by educational services, etc.), the organizer of the event, or their delegate, may organize the travel for these employees.

4.1.3 Carpooling

Carpooling is recommended whenever possible. When travelling with one or more passengers, an additional \$ 0.10 per KM is allocated to the vehicle owner. Names of additional passengers must be included in the *Travel Expense Form*.

4.2 Meals

Meal expenses incurred are refundable without supporting documents considering the following constraints:

- During a convention, symposium or any other activity for which meals are included in the registration fee or the cost of the room, the School Board will not reimburse any expenses linked to the fact that the participant did not take advantage of the inclusive meal.

- A copy of the schedule or the registration form **must** be included with the claim.

| Meals | Per diem allocated |
|--------------|---------------------------|
| Breakfast | \$15.00 |
| Lunch | \$20.00 |
| Supper | \$35.00 |
| Total | \$70.00 |

- ❖ For departure times prior to 6 a.m., breakfast will be reimbursed.
- ❖ For arrival times after 6 p.m., supper will be reimbursed.

4.3 Accommodations

4.3.1 Lodging expenses incurred are refundable with supporting documents considering the following constraint:

- During a convention, symposium or any other activity for which accommodations are included in the registration fee, the School Board will not reimburse any expenses linked to the fact that the participant did not take advantage of the inclusive accommodation.

4.3.2 The School Board shall pay the cost incurred at hotels, motels or Airbnb accommodations. Staff should endeavor to obtain government or other special rate for accommodation.

Rates should remain inferior to **160.00\$ plus applicable fees and taxes** a night. Exceptions to exceed this amount may be permitted with the authorization from immediate supervisor given a particular circumstance such as block room rates at conventions or in cases when two people are sharing accommodations. ***Original invoices are required. Credit card or debit card receipts are not considered original invoices.***

The school board shall allocate an additional \$10 per night to each employee/commissioner staying overnight at a hotel or motel to cover incidental costs incurred. ***Receipts are not required.***

4.3.3 The school board shall not refund extras incurred at the hotel such as mini bar or movies rentals expenses, etc.

4.3.4 For private accommodations, the School Board shall pay \$50 per night. *(Receipts are not required)*

5 DEROGATION

- 5.1** In general, the maximum amounts refundable amounts for expenses incurred in the course of a staff's functions as specified above prevail. However, higher or lower rates may be established for a special project or professional development activities.

6. TERMS OF REIMBURSEMENT

- 6.1** The Travel Expenses form *Appendix C* and supporting documents, must be submitted to the Accounts payable department no later than thirty (30) days after returning from each trip;
- 6.2** Travel expenses must be approved by the person (s) who authorized the travel, prior to the payment being issued.
- 6.3** Travel paid by another organization should not be claimed a second time through the school board.
- 6.4** Anyone found in contravention with this policy will be sanctioned accordingly.
- 6.5** **Credit card or debit card receipts are not considered original invoices.**

7. POLICY REVIEW

- 7.1** This policy will be reviewed annually or on an as needed basis.

8. EFFECTIVE DATE

This policy comes into effect on July 1, 2022

Appendix A – Authorization to Travel

Commission Scolaire Eastern Shores
Eastern Shores School Board

Appendice A
Appendix A

Formulaire de préautorisation de frais de voyage
Preauthorization of Travel Expenses Form

| | | | |
|---|----------------------|--------------------------------------|----------------------|
| Nom/Name: | <input type="text"/> | Ecole/School: | <input type="text"/> |
| Voyage demandé par / Travel Requested by: | <input type="text"/> | Code budgétaire / Budget code: | <input type="text"/> |
| Fonction / Function: | <input type="text"/> | Raison du voyage: Reason for travel: | <input type="text"/> |
| Date de départ / Date of departure: | <input type="text"/> | Heure de départ / Time of departure: | <input type="text"/> |
| Date de retour / Date of return: | <input type="text"/> | Heure de retour / Time of return: | <input type="text"/> |

| | | | |
|---|---|--|--|
| Voyager par / Travelling by : | <input type="checkbox"/> Location de voiture/Car Rental | <input type="checkbox"/> Véhicule personnel/Personal Vehicle | <input type="checkbox"/> Transports en commun (avion, ferry, Train) /Public Transport (Airplane, Ferry, Railway) |
| Est-ce que d'autres employés de l'école ou du conseil scolaire sont présents? Are other employees of the school or school board attending? | <input type="checkbox"/> Oui / Yes | <input type="checkbox"/> Non / No | <input type="checkbox"/> Je ne sais pas / I don't know |
| Si oui, est-il prévu de faire du covoiturage? If so, is it planned to carpool? | <input type="checkbox"/> Oui / Yes | <input type="checkbox"/> Non / No | <input type="checkbox"/> Si oui, êtes-vous le conducteur ou le passager? If yes, are you the driver or the passenger? |

Nom (s) de la / des personne (s) du covoiturage: / Name(s) of person(s) in carpool:

Les frais de repas sont-ils inclus dans les frais d'inscription à l'activité ou dans les frais d'hôtel? / Are meal expenses included in the activity registration fee or hotel cost?
 Oui / Yes Non / No Si oui, quel repas est fourni? / If yes, which meal is provided?

Les frais d'hébergement sont-ils inclus dans les frais d'inscription aux activités? / Are accommodation expenses included in the activity registration fee?
 Oui / Yes Non / No Si oui, combien? / If yes, how much?

Aurez-vous besoin d'un enseignant suppléant? / Will you require a supply teacher?
 Oui / Yes Non / No Si oui, pendant combien de jours (demi / complet)? / If yes, for how many (half/full) days?

Estimation des frais de déplacement: / Estimate of travel expenses:

| | | | |
|------------------|----------------------|---------------------------------|----------------------|
| Voyage / Travel: | <input type="text"/> | Repas / Meals: | <input type="text"/> |
| Hôtel / Hotel: | <input type="text"/> | Inscription / Registration Fee: | <input type="text"/> |

| | |
|---|----------------------|
| <input type="text"/> | <input type="text"/> |
| Signature de l'employé / Employee Signature | Date |

| | |
|--|----------------------|
| <input type="text"/> | <input type="text"/> |
| Approbation supérieur immédiat / Immediate Superior Approval | Date |

| | |
|--|----------------------|
| <input type="text"/> | <input type="text"/> |
| Approbation du coordonnateur/directeur / Coordinator/Director Approval | Date |

Remarque: la Commission scolaire Eastern Shores offre une avance sur les déplacements si vous en avez besoin. Appendix B
 Note: The Eastern Shores school Board offers an Advance on Travel (AOT) should you require one. Appendix B

APPENDIX B - Travel Advance Form

Travel Advance Request

| | | | |
|-------------------------|---------------|---|--|
| Date Submitted | | <div style="border: 1px solid black; padding: 5px;"> <p align="center">IMPORTANT NOTICE</p> <p>By signing and submitting this form you agree that the requested funds will be used for the purposes stated in this form. Failure to provide an expense report with receipts within 30 days of your return date can result in a paycheck deduction to cover the amount of funds advanced to you.</p> </div> | |
| Traveler Name | | | |
| Traveler Address | | | |
| E-mail Alias | | | |
| Phone | | | |
| Department | | | |
| Destination | | | |
| Departure Date | | | |
| Return Date | | | |
| Purpose of Travel | | | |
| Total Advance Requested | \$0.00 | | |
| Approved By | | | |
| Approval Signature | | Date Signed | |
| Traveler Signature | | | |

Anticipated Expenses

| Type of Expense | Description of Expense | Daily Expenses (Except Airfare) | # of Days | Total Expenses |
|------------------------------|------------------------|---------------------------------|-----------|----------------|
| Airfare | | | | \$0.00 |
| Ground Transportation | | | 0.52 | \$0.00 |
| Conference/Registration Fees | | | 1 | \$0.00 |
| Lodging | | | 1 | \$0.00 |
| Meals and Tips | | | 1 | \$0.00 |
| Miscellaneous | | | 1 | \$0.00 |
| Grand Total | | | | \$0.00 |

Reserved for Finance department

| | |
|------------------|------------------------|
| Invoice number : | |
| Vendor number : | |
| Date of check : | |
| Code : | 000-1-01511-000 |
| Check number : | |

Note : The travel advance request may be faxed to the accounts payable department. The original copy should be forwarded without delay.

APPENDIX C - Travel Expense Claim Form

Appendice C / Appendix C

Commission Scolaire Eastern Shores
Eastern Shores School Board

Formulaire de remboursement des frais de déplacement
Travel Expense Claim Form

Nom/Name : _____ # Facture/Invoice # : _____
(Initiales-année-mois-jour ex PR-2019-01-25)
 Adresse/Address : _____
(Initiale-year-month-day ex PR-2019-01-25)
 Fournisseur/Vendor : _____
 École/School : _____
 Fonction /Function : _____ Raison/Reason : _____
 Date du Départ/Date of Departure : _____ Heure de départ/Time of Departure : _____
 Date du retour/Date of Return : _____ Heure d'arrivée/Time of Arrival : _____

A.

| DATE | DESCRIPTION | TRANSP. | LOGEMENT HOTEL | REPAS MEALS | REGIST. | TOTAL |
|-------------------------|-------------|---------|-------------------|----------------|---------|-------|
| | | | | | | \$ - |
| | | | | | | \$ - |
| | | | | | | \$ - |
| | | | | | | \$ - |
| | | | | | | \$ - |
| | | | | | | \$ - |
| | | | | | | \$ - |
| TOTAL | | \$ - | \$ - | \$ - | \$ - | \$ - |
| A TOTAL | | | | | | \$ - |
| B INDEMNITE / KM | | | | | | \$ - |
| ADVANCE | | | | | | |
| GRAND TOTAL | | | | | | \$ - |

B. PRIVATE TRANSPORT PRIVÉ

| DATE | DE / FROM | A / TO | #KM | Taux RATE | MONTANT AMOUNT |
|--------------|-----------|--------|-----|--------------|-------------------|
| | | | | | \$ - |
| | | | | | \$ - |
| | | | | | \$ - |
| | | | | | \$ - |
| | | | | | \$ - |
| | | | | | \$ - |
| TOTAL | | | | | \$ - |

Accompagné de / Accompanied by: _____

| | | | | | |
|------|----------------------|------------------|----------------------|------------------|----------------------|
| Code | <input type="text"/> | Projet / Project | <input type="text"/> | Montant / Amount | <input type="text"/> |
| Code | <input type="text"/> | Projet / Project | <input type="text"/> | Montant / Amount | <input type="text"/> |

Signature _____ Employee Immediate Superior Coordinator / Director

