



Title	Travel Policy and Procedures
Policy Number	E 1.15
See also	Signing Authority Policy Hospitality Policy Alcohol Policy – Service and Consumption Kilometre Reimbursement Policy Cellular Device Policy Collective Agreements Code of Ethical Practices

Effective Date of Policy: March 9, 2016
Approval Date: March 8, 2016
Applies to: Employees, Students, Contractors
Approving Body: President
Supersedes/New: January 12, 1999 Supply Management Procedures Manual Travel Policy; revised March 10, 2005; revised August 2010

The following are responsible for the administration of this policy,

Primary Office	Contact
Office of the Vice President, Employee and Corporate Services	Vice President, Employee and Corporate Services

Policy Statement

As a publicly funded institution, the College is accountable for the effective and efficient use of its resources. Travel expenditures must be reasonable, support the College's activities, and adhere to the Okanagan College Strategic Plan.

Policy Details

1.0 **General**

- 1.1. This policy applies to travel expenses for College related business, including expenses paid from all College administered funds, including those from grants, research funding and other funding contracts.
- 1.2. The College will pay or reimburse the cost for travel expenses incurred by employees, and, in special cases, with advance approval from a Leadership Team member, students or other persons, provided they are on a College related activity and comply with College policies and procedures.
- 1.3. Travelers are encouraged to use tele-conference, video-conference, etc. where possible as an alternative to travel.
- 1.4. To the extent that a collective agreement conflicts with this policy, then the collective agreement terms will apply.
- 1.5. The Okanagan College region is defined as the area from Revelstoke to Osoyoos.

2.0 **Authorization**

OUT OF REGION TRAVEL, WITHIN BRITISH COLUMBIA

- 2.1 Prior to travel outside of the Okanagan College region and within the Province of British Columbia, the traveler must give advance notice including details of the travel to his/her supervisor.

TRAVEL OUTSIDE OF BRITISH COLUMBIA

- 2.2 Prior to travel outside of the Province of British Columbia, excluding travel for Professional Development approved by the PD Committee, the traveler must receive approval from his/her supervisor through the Travel Approval Form. The traveler must complete and sign the Travel Approval Form (<http://www.okanagan.bc.ca/Asset1497.aspx>), and obtain his/her supervisor's approval before the date of travel.
- 2.3 For the President and Vice Presidents, the Travel Approval Form is required for travel outside of Canada and the United States. Notice of travel in section 2.1 is not required.

3.0 **Accountability**

- 3.1. All travelers must exercise care in incurring travel expenses. It is the responsibility of the traveler to make the most operationally feasible, economical travel arrangements possible consistent with the purpose of the trip.

4.0 **Accuracy and Repayment**

- 4.1. The traveler and the supervisor who approves the travel expenses are responsible for ensuring that claims for expenses are in accordance with the College's policies and procedures and are for College purposes only.
- 4.2. Travel expense claims and supporting documents must be accurate and complete with claims being submitted in a timely manner.

Procedures

5.0 **Accommodation and Meals**

ACCOMMODATION

- 5.1. Commercial Accommodation:
 - a) Reimbursement for accommodation will be limited to reasonable amounts in the particular circumstances and will not exceed the standard single occupancy rate;
 - b) Travelers should request B.C. government rates when booking hotel rooms; and
 - c) For a listing of hotels with B.C government rates, see the B.C. government website, Procurement Services, Business Travel Accommodation Listing at the following link <http://csa.pss.gov.bc.ca/businesstravel/>.
- 5.2. Non-Commercial Accommodation and Private Dwelling:
 - a) When non-commercial lodging or private dwelling accommodation is used, travelers:
 - i) are entitled to claim \$33.00 as a lodging allowance per night (amount is subject to change with amendments to the collective agreements). This payment may be counted as a taxable benefit to the traveler; or
 - ii) may be reimbursed for modest gestures of appreciation for individuals who have provided accommodation to a maximum of \$33.00 per night. Original receipts for the token of appreciation must be submitted to claim this expense and will not be counted as a taxable benefit to the traveler.

MEALS

- 5.3. For travelers who are bargaining unit employees, meal expenses will be in accordance with the respective collective agreement.
- 5.4. For travelers not covered by a collective agreement, meal expenses will be the same rates provided to bargaining unit employees for receipted meals and non-receipted per diem costs. Any exceptions to meal rates for travel outside of the College region, must be reasonable (use the Hospitality Policy meal rates as a guideline) and must be approved by the traveler's supervisor.

- 5.5. Travelers may be reimbursed for the cost of meals either by submitting itemized receipts for actual meal costs or by claiming meal per diems up to the daily maximum value.
- 5.6. Meals hosted by a Leadership Team member related to College business during travel will be governed by the Hospitality Policy.
- 5.7. Alcoholic beverages will not be reimbursed except under the terms of the Hospitality Policy.
- 5.8. Where multiple employees are traveling together, meal expenses should be expensed either individually or by the employee with the most senior classified position present and include a list of employees attending.
- 5.9. Per diem meal allowances:
 - a) No receipts are required, but meal expenses without receipts may be a taxable benefit;
 - b) May only be claimed by travelers for themselves; and
 - c) May not be claimed where meals are already included for a meeting, event or conference.
- 5.10. Entertainment will not be reimbursed except in accordance with the Hospitality Policy.
- 5.11. Travel outside Canada will be reimbursed based on National Joint Council rates for meals and daily per diems. (See <http://www.njc-cnm.gc.ca/doc.php?sid=3&lang=eng>).

6.0 **Transportation – Air, Private Vehicles, Rental Vehicles, Other**

AIR

- 6.1. The most operationally feasible, direct and economical route is to be used.
- 6.2. Flights should be booked as far in advance as possible to obtain the best rate.
- 6.3. Travel shall be economy class unless specifically pre-approved by the President or the appropriate Vice President on the Travel Approval Form.
- 6.4. International travel (excluding travel in the United States) by travelers not in the International Department must be approved in advance by the President or an appropriate Vice President on the Travel Approval Form. The Director, International Department has the authority to approve international travel for employees in that department.

- 6.5. Travelers are discouraged from using personal loyalty points (e.g. Aeroplan, Air Miles) to book College travel. However, should the traveler choose to do so, the traveler will not be reimbursed for the equivalent cost. The College will reimburse for amounts actually paid by the traveler.

PRIVATE VEHICLES

- 6.6. Kilometres will be reimbursed to the traveler who incurred the expense and will be reimbursed as per the respective collective agreement or the Kilometre Reimbursement Policy. Reimbursement for kilometres will not exceed the cost of an economy airfare and other related transportation costs.
- 6.7. The traveler must submit a Kilometre Log (<http://www.okanagan.bc.ca/Asset28155.aspx>) for reimbursement of kilometre expenses.
- 6.8. The traveler is responsible for ensuring that the vehicle has the appropriate business use insurance documentation.
- 6.9. An employee who is required to travel in excess of six days per month between College centres, campuses, or locations on College business shall, subject to the prior approval of his/her supervisor, be reimbursed, upon presentation of appropriate receipts and documents, 100% of the annual incremental cost, prorated for the term of the appointment, of the Insurance Corporation of British Columbia Class 007 (Business) premium that is over and above that for Class 002 (Drive to Work or School) or 003 (Drive to Work or School under 15k), whichever is appropriate. Such reimbursement shall be limited to one vehicle per employee and it is the employee's responsibility to purchase Class 007 vehicle insurance when necessary. If the College so reimburses the employee, the employee shall normally use his/her personal motor vehicle for travel on College business requiring a motor vehicle.
- 6.10. If the vehicle is insured for Class 002 (to and from work over 15km) there is no rate difference to Class 007.
- 6.11. All costs incurred by a traveler in a personal vehicle as the result of "collision" (e.g., own damage) or "comprehensive" type claims (e.g., fire, theft of vehicle, vandalism) are the responsibility of the traveler. Examples of such costs include the insurance policy deductible, loss or damage of personal property, and costs incurred while the traveler's vehicle is undergoing repairs.

VEHICLE RENTALS

- 6.12. Traveler may wish to rent a car to save time or reduce costs.
- 6.13. Travelers should request the BC government rate.

- 6.14. All rentals should be for non-luxury, intermediate size or smaller cars, unless four or more people are travelling together, in which case a larger vehicle is permitted. Reimbursable expenses include the rental fee, the km/mileage charge by the car rental agency and fuel charges. Only College business-related kilometer charges will be reimbursed.
- 6.15. It is the responsibility of the traveler to ensure appropriate insurance coverage is in place on vehicle rentals, for example, if someone other than the traveler operates the vehicle.
- 6.16. Rental companies do not provide full collision and comprehensive insurance for their vehicles as part of the basic rental rate. The College Travel VISA includes Auto Rental Collision/Loss Damage Insurance for cars, SUVs and mini-vans only. Vans, trucks, and other vehicles are not included. When the traveler uses the College Travel VISA, the traveler should decline the “CDW” or “LDW” protection offered by the rental car company at the time of check in.

OTHER TRANSPORTATION EXPENSES

- 6.17. Reasonable expenditures for parking, road tolls, ferries, taxis and public transportation to and from airports, railway stations, between appointments, hotel locations and meeting places are reimbursable.

7.0 Other Reimbursable and Non-Reimbursable Expenses

REIMBURSABLE EXPENSES

- 7.1. Reimbursable expenses include the following:
 - a) Voice and data communication charges to stay in touch with the College and to allow the traveler to stay in reasonable contact with their immediate family. Whenever possible, VOIP (such as SKYPE) phone service should be used for international phone charges. If this is not available, then one reasonable personal call per day is permitted when travelling internationally;
 - b) Internet charge in a hotel. This cost should be billed directly to the traveler’s hotel room;
 - c) Airline seat reservation charge;
 - d) Required baggage (excluding excess personal baggage) and storage charges;
 - e) Airline flight cancellation insurance cost (if purchased);
 - f) Necessary laundry expenses after 5 consecutive nights of domestic travel. The cost for laundry expenses are included in the incidentals amount for international travel;
 - g) Reasonable gratuities up to 15% (the per diem amount for meals includes the gratuity and taxes; amounts in collective agreements include gratuity and taxes);

- h) Travel visas or other related costs (excluding passports); and
- i) Exchange rate expenses. Exchange rates for international travel should be calculated using Thomas Cook's website www.oanda.com choosing the (+4%) typical cash option.

NON-REIMBURSABLE EXPENSES

7.2. Non-reimbursable expenses including the following:

- a) Costs for passports;
- b) If a personal credit card is used, interest charges on outstanding credit card balances or banking fees;
- c) Insured losses to personal vehicles, including the deductible;
- d) Parking fines, traffic fines, car washes or vehicle detailing;
- e) Personal expenses such as accident and life insurance, movies and mini bar charges;
- f) Expenses for failure to cancel transportation or hotel reservations;
- g) Roadstar coverage, BCAA and other similar plans for a traveler's private vehicle;
- h) Excess personal baggage; and
- i) Child, dependent person or pet care costs while away on College travel.

8.0 **Methods of Payment & Travel Advance**

8.1 Okanagan College Travel VISA Credit Card:

- a) If the traveler has an Okanagan College Travel VISA credit card ("College Travel VISA"), this must be the method of payment, where accepted, for all travel expenses;
- b) The Travel Approval Form, if applicable, must be attached to the College Travel VISA statement when submitted to the Finance Department;
- c) The traveler must submit his/her Professional Development Application Form, if applicable, with the signed College Travel VISA statement; and
- d) Unauthorized expenses inadvertently charged to the College Travel VISA, must be reimbursed by the employee to the College on or before the date the statement is due to be returned to Financial Services.

- 8.2 Personal Credit Card: If the traveler is using a personal credit card, an Expense Claim Form (<http://www.okanagan.bc.ca/Asset1483.aspx>) must be submitted to be reimbursed for College related travel expenses.
- 8.3 Travel Advance:
- a) If a traveler has a College Travel VISA, a travel advance is generally not permitted, except for international travel, and in limited cases, reimbursable kilometre costs;
 - b) Approval for a travel advance must be obtained from the traveler's supervisor on the Travel Approval Form <http://www.okanagan.bc.ca/Asset1497.aspx>;
 - c) Under normal circumstances, travel advances should not be made more than ten (10) business days prior to the start of the travel; and
 - d) Any unexpended funds from a travel advance must be repaid to the College within 30 days after the last day of travel.

9.0 **Expense Claim Process**

- 9.1. Claims for reimbursement of travel expenses must be submitted on an Expense Claim Form or Non-Employee Expense Reimbursement Form (<http://www.okanagan.bc.ca/Asset18786.aspx>) within 30 days of the last day of travel, and prior to fiscal year-end.
- 9.2. Travel expenses on the Expense Claim Form and the Non-Employee Expense Reimbursement Form must have:
- a) a clear statement of the purpose and duration of the trip;
 - b) expenses supported by original receipts, including itemized meal receipts unless the claim is a per diem meal expense. Please note that credit card or debit transaction receipts, room service or in-restaurant meals on hotel invoices are not acceptable as itemized meal receipts;
 - c) the original signature of the traveler certifying that all information is correct;
 - d) written approval from the traveler's Supervisor;
 - e) written approval from the President or appropriate Vice President as necessary; and
 - f) an attached Travel Approval Form and/or a Professional Development Application Form when applicable.
- 9.3. Missing Receipts:
- a) If the traveler is missing a receipt for a meal that was paid by cash then the traveler will be reimbursed as a per diem expense;

- b) If a traveler is missing a receipt for any other type of expense that was paid by cash, a reimbursement cannot be claimed;
- c) When a travel expense receipt or an itemized meal receipt is missing and a duplicate cannot be obtained, the traveler must submit the Declaration Form for Lost/Missing Receipts signed by the traveler and the traveler's Supervisor, along with some type of proof of payment (i.e. credit card statement, etc.); and
- d) A traveler is expected to provide receipts, therefore the traveler's use of this form will be on a very limited basis. Declaration Form: Lost/Missing Receipts (<http://www.okanagan.bc.ca/Asset35549.aspx>).

9.4 If a traveler requires special travel arrangements that vary from this policy, those arrangements must be detailed and approved on the Travel Approval Form. An example of special arrangements may include staying an additional night for accommodation costs to achieve a greater savings on airfare or overall travel costs.

10.0 **Combining College Travel with Personal Travel**

- 10.1 The cost of personal travel (e.g. extending trips or excursions for personal benefit) is not eligible for reimbursement. Prior to the traveler scheduling indirect routes, the traveler's supervisor and the traveler must agree on a fair allocation of expenses for the trip. In no event will the College's portion of expenses exceed what would have been charged had the personal travel not occurred.
- 10.2 Traveler must obtain vacation approval from his/her supervisor according to the vacation policy or collective agreement prior to making combined personal and business travel arrangements.
- 10.3 Travel expenses for a family member are not reimbursable unless it can be shown that the family member's presence was both essential and directly related to the effective accomplishment of College business. In these limited instances, the traveler must obtain prior written approval from the President or the appropriate Vice President on the Travel Approval Form.

11.0 **Medical Insurance**

- 11.1 Travelers should ensure they have adequate personal medical insurance before travel.
- 11.2 Travel medical insurance is included in the employer provided extended health care plan for eligible employees.
- 11.3 Travelers should be aware that some of the non-medical insurance (e.g. WCB coverage) provided by the College only applies when the traveler is conducting

College business. Vacation periods before, during and after College business are not covered.

Appendix A – Forms

- 1) Travel Approval Form – <http://www.okanagan.bc.ca/Asset1497.aspx>
- 2) Expense Claim Form - <http://www.okanagan.bc.ca/Asset1483.aspx>
- 3) Kilometre Log Form - <http://www.okanagan.bc.ca/Asset28155.aspx>
- 4) Lost/Missing Receipt Form - <http://www.okanagan.bc.ca/Asset35549.aspx>
- 5) Professional Development Application –
<http://www.okanagan.bc.ca/Asset1542.aspx>
<http://www.okanagan.bc.ca/Asset5116.aspx>
<http://www.okanagan.bc.ca/Asset1923.aspx>
<http://www.okanagan.bc.ca/Asset20087.aspx>
<http://www.okanagan.bc.ca/Asset20083.aspx>
<http://www.okanagan.bc.ca/Asset20084.aspx>
<http://www.okanagan.bc.ca/Asset20085.aspx>
- 6) Grant-in-Aid Form – <http://www.okanagan.bc.ca/Asset5009.aspx>
- 7) Non-Employee Expense Reimbursement Form -
<http://www.okanagan.bc.ca/Asset18786.aspx>