Greater Essex County District School Board

Policy: Expenses (Staff) – Conferences, Workshops, Meetings and Travel

Reference No: P-BA-15

In order to provide opportunities for employees to gain a greater depth of knowledge and experience, and to keep abreast of current developments relative to their work in education and in the school system, the Greater Essex County District School Board encourages the attendance of selected personnel at conferences, workshops and meetings. Eligible expenses incurred during the business of the Board will be reimbursed.

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As a publicly funded organization, the Greater Essex County District School Board is committed to protecting the interests of taxpayers by ensuring accountability, transparency, fairness and value-for-money with respect to employee-related expenses.

All staff submitted and/or approving expense claims shall comply with the requirements set out in this regulation.

Approval

Professional development, conferences and workshops will be approved based on budget availability, relevance to the employee's position and the ability to benefit from the experience. Employees are to share the benefits gained with their colleagues.

The appropriate Supervisor shall be informed well in advance of all planned absences of staff during the school hours for attendance at conferences, workshops and meetings. All requests must be authorized by the appropriate level of management with the approver being superordinate to the applicant. Approval is based on budget, scheduling and relevance of the conference topics.

Staff are required to report their absence in Smart Find Express (commonly referred to as "TESS).

Allowable Expenditures

<u>Travel</u>

The most practical and economical mode of travel shall be used within the limitations of the schedule for the conference, workshop and/or meeting.

Where use of alternative modes of public transportation is not available or feasible, an automobile may be used, subject to payment of kilometrage allowance as follows:

- Kilometrage includes the actual distance travelled to destinations in a personal vehicle while on Board business;
- No claim should be made from home to normal work location;
- No claim should be made if the home to normal work location distance is the same or greater than the distance traveled to an alternate location;
- Claims should be calculated based on the total distance from home to alternate work location for the day less the distance from home to the normal work location;
- Kilometrage at the current rate will be paid for an amount not to exceed the equivalent economy airfare to the conference, workshop, or meeting destination.
- Kilometrage rate is based on the automobile allowance rates determined by the Canada Revenue Agency;

- Highway toll fees such as, but not limited to, 407 Electronic Toll Route (ETR) charges are not eligible for reimbursement.

Meals

Reimbursement of actual meal expenses will be provided up to the daily per meal maximum, inclusive of tax and gratuities. Supporting documentation is required for reimbursement.

Daily maximum, including taxes and gratuities, is $70. Employees with special dietary requirements may seek accommodations to the daily maximum rate.

Meals which are already provided for (e.g. included in the cost of the conference) are not eligible for reimbursement.

Expenses for a group may only be claimed by the most senior position present.

Alcohol, including LCBO gift certificates, cannot be claimed and will not be reimbursed, except in accordance with the Hospitality policy and regulation BA-26.

An advance of funds based on the estimated expenses may be authorized by the Superintendent of Business or designate. The advance will be deducted from the total of the expenses submitted after the conference, workshop or meeting is attended.

If the nature of the expense requires the exercise of discretion, a written explanation of the rationale shall be provided by the next highest level of authority and shall be attached to the expense claim. Approvers shall consider whether the request is:

- Able to stand up to scrutiny by auditors and members of the public;
- Properly explained and documented;
- Fair and equitable; and
- Reasonable and appropriate.

Submission of Expense Reports

When employees request reimbursement, itemized receipts must be submitted for all items (debit/credit card slips will not be accepted). Expense claims must be submitted by the end of the month following the month in which the expense was incurred. If collective agreements or letters of agreement stipulate a different time period, then that time period shall govern.

Those individuals who are accountable for the review and approval of employee expense claims shall be responsible to ensure the expenses are reasonable, are fully supported and adhere to this regulation.

Individual Incurring Expense	**Required Approval**
School Staff	Superintendent, Principal
Principal	Superintendent
Non-School Staff	Department Manager
Department Manager	Superintendent
Superintendent	Director of Education
Director of Education	Chair of the Board

Trustee Expenses:

A distinct policy and regulation, BA-07 “Trustee Expenses” has been established for trustee expenses.