



**TRAVEL POLICY**  
**Approved by the Board of Directors**  
**September 2013**

## **INTRODUCTION**

STLHE shall provide reimbursement for reasonable expenses incurred by individuals while carrying out STLHE business. The same policy will apply when expenses are related to an Award co-sponsored by STLHE (see Appendix A).

The guidelines contained in the following sections are intended to assist travellers in understanding and applying the policy. Any questions related to the policy should be directed to the STLHE Administrator (Sylvia Avery) or STLHE Treasurer (Davar Rezania).

## **DEFINITIONS**

**Individual**—includes, but is not limited to: a member of the STLHE Board of Directors\*, an award coordinator, an award recipient, members of the Council of 3M National Teaching Fellows Executive, the Educational Developers Caucus Executive, and STLHE administrative staff.

**Reasonable Cost**—based on sound judgment and moderation, reflecting consideration of accountability, efficiency, and value for money, and does not attract a taxable benefit as defined by the Canada Revenue Agency.

**Approval**—the STLHE Administrator is authorized to review purpose, reasonable cost, and prepare reimbursements to individuals. The STLHE Treasurer must approve any reimbursement over \$500.

**\*Note**—Members of the Board of Directors are expected to receive financial support from their home institution to attend one face-to-face meeting.

## **POLICY**

1. All reasonable accommodation, transportation, meals and out-of-pocket expenses incurred on STLHE business will be reimbursed after travel has been completed.
2. If personal and business travel is combined, personal costs are not reimbursable and the amounts claimed should be appropriately prorated.
3. Original receipts must support expense claims. These should include both the ticket and boarding pass (if applicable) for air or rail travel and both the credit card payment slip and the itemized bill for restaurant meals.
4. Travel expense reports shall be submitted on a timely basis, ideally within fifteen (15) days of return travel or from the date the expense was incurred and not exceeding twelve (12) months after the expense is incurred.
5. Reimbursements for costs in a foreign currency will be converted at the exchange rate in

effect at the date of purchase.

6. Reimbursements will be issued by cheque within 30 days of receipt of the completed documentation.

## GENERAL INFORMATION

### AIR FARE

Individuals shall use Economy airfare for STLHE business. Claims for First Class and Business Class travel are not eligible and will be reimbursed at the economy rate.

Airfare and flight cancellation insurance shall be reimbursed where supported by a printed itinerary indicating payment.

Financial penalties related to flight changes and cancellations of non-refundable tickets are reimbursable if the change is made for STLHE business reasons, not for personal reasons.

### ACCOMMODATIONS

Reimbursement is limited to a single room rate per traveller, supported by an original hotel invoice marked "paid."

Travellers attending conferences should stay at the host hotel at the designated attendee rate, unless a lower rate can be obtained elsewhere.

Accommodation is provided for the number of nights necessary to enable the traveller to participate in the event for which she/he is travelling. Those who wish to extend their stay before or after the event may do so at their own expense.

Where reservations must be cancelled, it is the responsibility of the traveller to ensure the cancellation is made in advance so "no show" charges will not be incurred.

### MILEAGE

Individuals have the option to choose road transportation providing the travel cost does not exceed the overall total cost of lowest and reasonable airfare and associated ground transportation to the same destination.

Where a personally owned vehicle is used for STLHE business, a kilometer allowance shall be provided to defray operating costs including gasoline, insurance, repairs and maintenance.

The kilometer allowance shall be equal to the Canada Revenue Agency's automobile allowance set for each calendar year based on the rate established for travel of greater than 5,000 kms. The current rate is **48 cents** per kilometer driven.

Where a personally owned vehicle is used for STLHE business, the owner shall carry adequate personal car insurance on the vehicle. The cost is not reimbursable.

### **VEHICLE RENTAL**

The full cost for vehicle rental (30 days or less) for approved STLHE business will be reimbursed. The renter shall purchase insurance coverage, which is reimbursable.

STLHE will reimburse the rental cost of intermediate sized vehicles. A larger size vehicle may be rented if three or more travellers are sharing.

Rental vehicle gasoline is reimbursable based on submission of original receipts.

### **RAIL**

Individuals have the option to choose train travel providing the travel cost does not exceed the overall total cost of lowest and reasonable airfare and associated ground transportation to the same destination.

Travel by rail shall use Club Car accommodation for day travel, or standard lower berth or roomette accommodation for overnight travel.

### **GROUND TRANSPORTATION**

Travellers will be reimbursed for limousine, taxi and public transportation expenses incurred for STLHE business trips to and from airports, hotels or meetings. The most practical and safe method of ground transportation should be selected.

### **PARKING**

Parking costs while on STLHE business are reimbursable with an official receipt.

### **TRAVEL CANCELLATION AND CHANGES**

Cancellation and change penalties for air, rail, hotel and car rentals can be expensive. Travellers should review change and cancellation policies at the time of booking with a view to minimizing costs should changes become necessary. In the event a change or cancellation is required, travellers should request and retain the change/cancellation number for verification purposes.

### **TRAVEL ADVANCES**

STLHE does not provide travel advances.

If travel expenses have been incurred on a personal credit card, the interest on any unpaid balances is not eligible for reimbursement.

## MEALS

Reasonable costs for meals are reimbursable provided an original, detailed restaurant bill (including date, items consumed, amount and gratuities with proof of payment) is submitted. Only meal costs incurred while on University business or during travel for University business should be claimed.

A per diem meal allowance may be claimed in lieu of actual costs in the amount of \$51 per day (or \$17 per meal) in Canadian dollars for travel in Canada or U.S. dollars for travel outside Canada. Receipts are not required to support a per diem meal allowance. The meal allowance includes gratuities and taxes.

The per diem allowance will not apply where meals are included as part of another reimbursable item (e.g. conference, transportation). The per diem claim should be reduced accordingly.

## ALCOHOL

Reasonable costs for alcoholic beverages with a meal or during a reception are reimbursable where the consumption is: nominal or moderate, does not exceed the cost of food, and is not specifically restricted by funding source.

## HOSTING GROUP EVENTS

It may be reasonable and necessary to host a group event in a restaurant where the maximum meal allowances identified above will likely be exceeded. Nevertheless, costs should be managed effectively. The following guidelines will assist in this regard:

- Pre select a menu if at all possible
- Pre select beverages if at all possible
- Request the host be consulted before wine is uncorked
- Consider the necessity of uncorking additional bottles of wine near the end of the meal
- Unless the venue specifies a service charge, which may be the case for a pre-selected, fixed priced menu, add 15% of the total cost of food and beverage to the bill; do not include taxes in the calculation
- Check the bill carefully before paying it

## COMMUNICATION

Personal mobile device calling and data usage charges are not reimbursable.

## **MISCELLANEOUS EXPENSES**

### **Tips/Gratuities**

Reasonable incidental tip or gratuity charges are permissible without receipt. This does not apply to tips and gratuities included in other expenses (for example, meals).

### **Laundry and Valet Service**

In the event of an emergency situation, or where a trip involves seven nights or more hotel accommodation, reasonable and necessary laundry and valet expenses may be claimed.

## **EXCEPTIONS**

Under some circumstances, exceptions to the travel expense policy may be justified. A brief note explaining why there was a deviation from the guidelines should accompany the expense reimbursement claim. Any exceptions will be reviewed on a case-by-case basis by STLHE Administrator and STLHE Treasurer, but will not be considered a precedent.

## APPENDIX A

### Award Programs: Allowances and Eligible Expenses

#### 3M National Teaching Fellowship

- 3M National Teaching Fellows are invited to attend scholarly retreat at the Banff Springs Hotel in November of the year their Fellowship was awarded.
- The following expenses related to the Retreat will be paid by STLHE and 3M Canada:
  - Return travel to Calgary, Alberta
  - Ground transportation, shuttle service, and taxis
  - Four nights accommodation, scheduled meals and nutrition beaks, pre-arranged activities, applicable taxes and gratuities at the Fairmont Banff Springs Hotel.
- Not covered are long distance calls, internet charges, spa treatments and products, and personal bar tabs.
- 3M National Teaching Fellows are also invited to attend the STLHE annual conference in the year the Fellowship was awarded. We encourage each Fellow to approach the Provost at their own university to ask for financial support to attend the conference.

#### 3M National Student Fellowship

- 3M National Student Fellows are invited to attend the STLHE annual conference in June of the year their Fellowship was awarded.
- The 3M Program will cover the cost of travel, three nights accommodation, scheduled meals and nutrition beaks, pre-arranged activities, applicable taxes and gratuities.
- STLHE conference registration at the student rate is also covered.

#### Desire2Learn Innovation Award

- Each award recipient will receive up to \$1,200 for registration and travel to attend D2L's FUSION Conference with accompanying receipts.
- Each award recipient will also receive \$1,000 for registration and travel to attend the STLHE annual conference with accompanying receipts.

#### Alan Blizzard Award

- \$2,000 in funding will be awarded to assist the winning team with travel and other expenses associated with attending the annual STLHE Conference.
- Five complimentary registrations to the STLHE annual conference will also be given to the winning team.

#### College Sector Educator Award

- Each award recipient will receive up to \$1,000 to attend the STLHE annual conference with accompanying receipts.

#### Christopher Knapper Lifetime Achievement Award

- The recipient of the award is invited to attend the STLHE annual conference. All reasonable travel expenses will be paid.

**Outstanding Volunteer Award**

- At this point in time, there are no funds available to help with travel to the STLHE Conference to receive the Award.