



## TOWN OF PORT HAWKESBURY MUNICIPAL TRAVEL EXPENSE POLICY

### GENERAL STATEMENT OF POLICY

The Town of Port Hawkesbury wishes to establish and maintain an orderly system for the administration and control of Council and Employee *Travel and Expense*.

#### Objective

To ensure uniform standards and procedures respecting Council and Employee Travel and Expense Claims.

### GENERAL STATEMENTS OF RESPONSIBILITY AND PROCEDURE

#### Responsibilities

##### I. Town Council's Responsibilities

The Town Council will:

- (1) approve any changes in the amount provided or manner in which it is disbursed

##### II. Chief Administrative Officer's Responsibilities

The Chief Administrative Officer will:

- (1) administer the policy and procedures as outlined; and
- (2) recommend to Council, for consideration, any changes in the amount provided or manner in which it is disbursed

#### Travel Expense Claims Policy and Procedures

##### 1.1 General

- i. All Municipal travel for which an expense claim will be submitted must be approved at the appropriate level.
- ii. Expenses will be provided to Council members, employees, *and bonafide representatives*, who attend meetings, seminars, conferences, training sessions, etc., as representatives of the Town.
- iii. All requests for reimbursable travel by members of Council shall be reviewed by the Chief Administrative Officer, who shall consider the necessity for travel on the basis of information provided on the claim form under the title "Purpose of Travel". The Council shall, where possible, be advised of who is travelling.

- iv. When two or more requests are made by Councilors for the same purpose, the Chief Administrative Officer in discussion with the Mayor shall then determine the appropriate number of persons necessary to represent the Town. Should a Councilor have a disagreement regarding their request for travel, the request will be reviewed with the Mayor.
- v. All requests for travel by the Chief Administrative Officer shall be reviewed by the Mayor, who shall follow the same guidelines established for Council members, as contained in section (iii) above.
- vi. All requests for travel by employees shall be reviewed by the Chief Administrative Officer or appropriate supervisory Director or Manager, who shall follow the same guidelines established for Council members, as contained in section (iii) above.
- vii. The Town of Port Hawkesbury is not responsible for the cost of travel, lodging, meals, registration, etc., of spouses when they are accompanying the elected or appointed officials to meetings, seminars, conferences, training sessions, etc. unless specifically authorized by Council.
- viii. Travel must have a justifiable Town of Port Hawkesbury purpose in order to be reimbursed. The person authorizing the travel will determine if the intended purpose is a valuable investment for the Town of Port Hawkesbury. All travel should be discussed with the signing authority in advance of travel to guarantee reimbursement.
- ix. It is expected that when attending a conference, in order to be eligible for reimbursement of expenses, 80% of the conference sessions be attended. If this is not possible, it should be discussed with the signing authority in advance of attendance.
- x. Where attending a conference or a meeting where there is agenda material, the agenda must be attached to the claim form. Where there is travel for the purpose of meetings or appointments where there is no agenda material, the following details must accompany the claim form in the Written Travel Report:
  - a. Date of meeting
  - b. Place of meeting
  - c. Start and end time of meeting
  - d. Persons present at the meeting
  - e. Brief statement of discussions held
- xi. Travel claims are to be completed by the Claimant.

## 1.2 Rates

- i. Claimable travel shall be paid in accordance with rates established by the Council. (Schedule 'A' attached)
- ii. A current schedule of rates should be appended to the Policy at all times.

## 1.3 Disbursements

- i. Payment shall be made upon presentation of a completed travel expense form (Schedule 'B' attached).

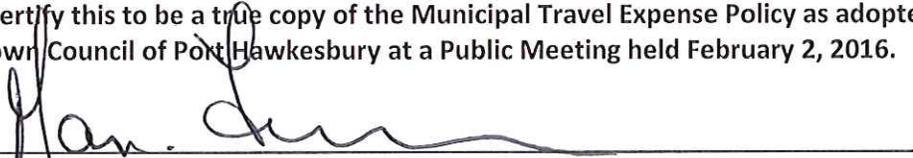
- ii. The travel expense form shall provide the following information:
  - a) Destination (City & Province)
  - b) Purpose of travel
  - c) Date and time of departure and return
  - d) Claimable costs
  - e) Declaration (to be signed upon trip return)
  - f) Brief written travel report or copy of event agenda
- iii. The Mayor must approve the Chief Administrative Officer's completed travel claim form. The Chief Administrative Officer must approve Mayor and Council's completed travel claim forms.
- iv. All other staff completed claim forms must be approved by the appropriate supervisory Director or Manager.
- v. To be eligible for payment, travel expense forms must be presented for approval not later than 30 days after return.
- vi. Any adjustments noted after the claim form has been approved and paid will be indicated on the travel claim form and initialed by the claimant. Any payment for adjustments of an over/underpayment will be reconciled on a subsequent travel claim.

**1.4 Report**

- i. On a monthly basis, the Mayor, Council, and Chief Administrative Officer shall present the Council with a **written** travel report for all trips they are involved in, outlining the nature of each meeting, cost of travel, and a brief statement of discussions held. This summary will be posted on the Town of Port Hawkesbury website on a monthly basis.
- ii. All other trips shall be reported by the claimant in the manner provided in 1.3 (ii).

**1.5 Previous Travel Expense Claim Policy**

- i. The previous policy approved August 6, 2013 is repealed.

Policy Review Notification:	<u>January 8, 2016</u>
Policy Review Date:	<u>January 18, 2016</u>
Approved by Council:	<u>February 2, 2016</u>
I certify this to be a true copy of the Municipal Travel Expense Policy as adopted by the Town Council of Port Hawkesbury at a Public Meeting held February 2, 2016.	
	
Maris Freimanis, P. Eng. Chief Administrative Officer	



**SCHEDULE 'A'**  
**TOWN OF PORT HAWKESBURY**  
**APPROVED TRAVEL RATES**

**1.1 Accommodations**

- i. Whenever possible, overnight accommodations will be arranged by the Administrative Office and billed directly to the Municipality. If this is not possible, the room rate will be reimbursed at the actual cost. (Receipt required).
- ii. Travel expenses for accommodations shall only be reimbursed if the traveler cannot reasonably be expected:
  - a) To travel to a function commencing early in the day
  - b) To return at the conclusion of the function
  - c) To travel to or return from a function due to weather conditions

**1.2 Meal Expenses**

- i. Meal expenses will be compensated at the rate of:
  - a) \$15 for breakfast may be claimed when the claimant is required to commence travel prior to 7:30 am
  - b) \$20 for lunch may be claimed when the claimant is required to be travelling and away from the office during their normal lunch period
  - c) \$30 for dinner may be claimed when the claimant is not expected to return to Port Hawkesbury before 6:30 pm
  - d) Meal expenses should only be claimed by the claimant when there has been an out of pocket expense for the meal claimed
- ii. Any meal expense incurred for entertaining business associates will be reimbursed at the amount incurred. (Receipt required). Alcohol purchases will not be reimbursed.
- iii. Meals provided through registrations for business meetings, seminars, conferences, training sessions, etc., are not eligible for reimbursement. (Agendas to be appended to the expense claims).
- iv. Time of departure and return must be consistent with timing of function. Legitimate reasons for earlier/later departure/return should be documented on the claim form and discussed with the signing authority.

**1.3 Vehicle Use**

- i. Travel by private vehicle outside the Town will be reimbursed at the rate of \$0.48 (forty-eight cents) per kilometer and will cover return travel originating from Port Hawkesbury to the required destination. Shared use is encouraged where possible.
- ii. Travel within Town limits will be reimbursed as follows:
  - a) For trips 10 kilometres or less - \$5 per trip
  - b) For trips greater than 10 kilometres – mileage rate of \$0.48 (forty-eight cents) per kilometre

**1.4 Other**

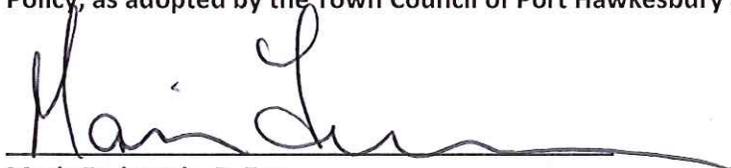
- i. Incidental expenses will be reimbursed at the rate of \$10 where overnight accommodations are required.
- ii. Parking, taxis, and tolls will be reimbursed at the actual rate incurred. (Receipt(s) required).

Policy Review Notification: January 8, 2016

Policy Review Date: January 18, 2016

Approved by Council: February 2, 2016

I certify this to be a true copy of Schedule 'A', Approved Travel Rates, of the Municipal Travel Expense Policy, as adopted by the Town Council of Port Hawkesbury at a Public Meeting held February 2, 2016.



Maris Freimanis, P. Eng.  
Chief Administrative Officer