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The following was approved by the Chief Administrative Officer (CAO) as an Administrative Policy on **Month day, 2024**.

## **PURPOSE**

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This policy sets out guidelines, authority, permitted expenses, payment limits and reporting requirements for expenses incurred by staff that are eligible for reimbursement for equipment, travel, and training opportunities for District of Lake Country (“District”) related business.

## **POLICY**

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### **1. GENERAL**

- 1.1. As contained herein, the District will reimburse employees for expenses incurred for:
  - (a) Costs associated with attendance at business meetings, conferences, seminars and other training
  - (b) use of personal cell phone devices
  - (c) work related clothing
- 1.2. The Chief Financial Officer may authorize reimbursement for other District business-related expenses such as the use of personal equipment for business purposes.
- 1.3. Request for reimbursement of expenses must be within budget and approved by the Employee’s Director or Manager.
- 1.4. Reimbursements will not be provided for alcoholic beverages or cannabis related products.
- 1.5. Requests for reimbursement must be submitted on an Expense Claim Form as established by the Finance Department within 30 days of an event, or as otherwise contained herein. Requests for reimbursement received more than 30 days after an event must be approved by the CAO.
- 1.6. All requests for reimbursement must include receipts, mileage record, GST, confirmation of booking, applicable name and employee ID number and complete credit card or debit card receipts.
- 1.7. The Mayor, or designate, is responsible for approving the Chief Administrative Officers (“CAO”) expense claims.
- 1.8. Out of country travel expenses may be reimbursed with prior approval from the CAO, using the average daily exchange rates from the Bank of Canada for the destination country and the number of days of travel.

## **2. REGISTRATION FEES**

The full amount of registration fees will be reimbursed.

## **3. AIR TRAVEL**

Air travel and associated costs will be reimbursed as follows:

- (a) return economy air transportation on a regularly scheduled flight at a reasonable and convenient travel time, booked far enough in advance to take advantage of discounted fares (if possible)
- (b) Where the cost of air travel is significantly reduced by extending the travel days, expenses will be reimbursed provided the additional expenses are less than the savings
- (c) Air travel cancellation insurance with approval from the CFO
- (d) transportation to and from airports at both the points of departure
- (e) airport parking, and taxi fare

## **4. VEHICLE TRAVEL**

Costs of travel via vehicle will be reimbursed as follows:

- (a) Where a personal vehicle is used, mileage for the distance traveled to and from the event will be reimbursed at the current CRA reasonable per kilometer rate. Requests for reimbursement will include a mileage record for distances travelled.
- (b) A District fleet vehicle may be used for travel where operationally feasible wherein fuel, parking, ferry, highway tolls and incidentals on route, will be reimbursed. The per kilometer rate will not be applied for use of a District fleet vehicle.
- (c) Where applicable, the maximum amount that will be reimbursed for travel by vehicle will not exceed the cost of return economy air transportation travel. Where the cost of travel by vehicle exceeds the cost of return economy air travel, a copy of both mileage record and air travel costs will be submitted with the claim.
- (d) Where two or more employees travel in one personal vehicle, only one employee may claim mileage for the distance travelled.
- (e) When a rental vehicle is necessary for business travel and no other reasonable transportation options are available, rental vehicle costs will be reimbursed. Reimbursement is limited to a compact vehicle unless three (3) or more employees are traveling together, in which case a larger vehicle is permitted.

## **5. ACCOMMODATION**

Costs of accommodation will be reimbursed as follows:

- (a) Single room hotel accommodation costs not exceeding the event or government rate at the event location, subject to availability.
- (b) A \$25 nightly allowance without receipts for stay with friends or relatives (private accommodation) instead of staying at a hotel, plus additional costs (e.g., taxi, mileage). Total expenses for stay at private accommodation (including additional costs) must not exceed the conference hotel's event or government rate.

**6. PER DIEM**

- (a) Where attendance at an event is for more than one day or one day with overnight travel, a per diem rate of \$85 per day without receipts to cover meals, gratuities, dry cleaning, phone calls and other miscellaneous costs, may be claimed.
- (b) Where meals are included in the event registration fee, the following Allowance per meal will be deducted from the per diem rate as follows:

<b>MEAL</b>	<b>ALLOWANCE</b>
Breakfast	\$15.00
Lunch	\$15.00
Dinner	\$30.00

- (c) For day of departure and day of return where business is required before or after 2:00 p.m. the per diem will be prorated to one half of the daily allowance.
- (d) Reimbursement for using a District credit card for meals while travelling requires advanced permission from the CFO or CAO.
- (e) For travel that does not exceed one day and does not require an overnight stay, meal reimbursements may be claimed up to the maximum Meal Allowance rates.

**7. DAY BEFORE AND AFTER TRAVEL EXPENSES**

When required, travel-related expenses may be claimed for one day immediately preceding and one day immediately following the event as contained herein in accordance with section 6 (b).

**8. ALTERNATE TRAVEL METHODS**

When air or vehicle travel is unavailable, the most economical transportation option will be used. Reimbursement will not exceed the equivalent return economy air transportation cost. A copy of the air travel estimates must accompany the expense claim.

**9. BUSINESS MEETINGS**

Directors and Managers may be reimbursed for meals costs for business meetings involving at least one other person.

**10. SHARED EXPENSES**

When an expense benefits more than one person the cost will be divided among those who benefit, for example if one registration fee covers three people, each person is responsible for one-third of the fee.

**11. PERSONAL TRAVEL EXPENSES**

- (a) Business and personal travel may be combined, however additional travel and accommodation expenses not associated with the business travel are the responsibility of the Employee. The District will reimburse the lesser of the employee's cost of a direct return flight based on the lowest fare available on the date of booking.
- (b) Spousal travel expenses including transportation, accommodation, registration and meals are at the expense of the employee. At the discretion of the Chief Financial Officer, registration fees or travel expenses for the travel partner may be pre-paid by the District with reimbursement from the employee within 30 days.

**12. WORK CLOTHING**

Expenses for work-related clothing will be reimbursed in accordance with the maximums defined in the Collective Agreement.

**13. CELL PHONES**

Employees eligible for a cell phone in accordance with Use of Technology Policy 224, 2025 will be reimbursed as follows:

- (a) Bring Your Own Device (BYOD) expenses will be reimbursed through the submission of an Expense Claim Form on June 30 and December 31 of each year in the amount of \$50.00 per month.
- (b) Summer Students identified as requiring a cell phone will be reimbursed \$100.00 at the end of their summer employment for use of their personal phone.
- (c) LCFD POC Members and LCFD Union Employees required to carry a cell phone, as identified by the Fire Chief will be reimbursed \$100.00 per year on the first pay period of January each year for use of their personal phone.

**14. REPEALS**

14.1. Travel and Expense Policy for Staff 172, 2019 is hereby repealed

**15. APPROVALS, AMENDMENTS AND ANNUAL REVIEWS**

Date	Approver	Type

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**Chief Administrative Officer**

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**Date**