

The Corporation of the City of Stratford

Policy Manual

T.2 Travel and Conventions

Dept: CAO's Office

Committee: Finance and Labour Relations

T.2.1 Travel and Conventions

Adopted: December 21, 1998 by R98-669

Amended: Sept. 10, 2001 by R2001-492, November 25, 2013 by R2013-466

Reaffirmed: March 10, 2003

Related Documents:

Council Policy Administrative Policy

1.0 PURPOSE AND SCOPE:

This policy is for the guidance and direction of elected officials and employees of the City of Stratford who incur expenses while travelling on authorized corporation business. Such persons are expected to use discretion and good judgement in all matters where municipal funds are spent.

2.0 OVERVIEW:

It is municipal policy to reimburse elected officials and employees for specific expenses as provided herein incurred on the City's behalf while on authorized corporation business. Such expenses must be reasonable in the circumstances and must be necessary and incidental to the performance of municipal business. The policy is not intended to reimburse elected officials and employees for expenses of a purely personal nature.

The City encourages elected officials and employees to become involved in conferences, conventions, training courses and workshops in order to network with other professionals and further develop their skills and knowledge.

3.0 AUTHORIZATION:

Prior to commitment, approval is required as follows:

3.1 Elected Officials:

The travel costs for elected officials are authorized by an allocation in the current budget for the mayor and council. Prior to commitment, there is no approval required for travel costs which are within the annual budget. Travel costs which are in excess of the travel budget for elected officials will require Council approval.

3.2 Management:

The travel costs for managers are authorized by an allocation in their current budget. Prior to commitment, there is no approval required for travel costs which are within the annual budget other than any provisions contained within this policy.

3.3 Employees:

The managers shall give prior approval for planned travel for any employee in the division. These costs must be provided for in the budget.

4.0 TRANSPORTATION:

4.1 All transportation arrangements must be approved as established under Section 3.0 and must be the most practical method of travel considering both time and total cost.

4.2 All travel by private automobile on City business will be paid at the prevailing rate plus parking charges supported by receipts to a maximum 600 km. radius of the City of Stratford.

4.3 Other forms of transportation may be used within the 600 km. radius of the City of Stratford provided such arrangements are approved as provided for in this policy.

4.4 Spousal travel costs for travel within a 600 km. radius of the City of Stratford will only be paid if the elected official or employee elects another form of transportation, but only to the extent that the cost for the alternate form of transportation for both does not exceed the costs that would normally be incurred as described in Clause 4.3 immediately above.

4.5 If a private automobile is used, out of personal preference, beyond the 600 km. radius of the City of Stratford, reimbursement will be limited to the lesser of mileage and parking expenses or an alternative transportation which could be used to travel there within one day.

4.6 When more than one employee and/or elected official attends a function, they shall attempt, where feasible, to travel together to reduce costs.

4.7 If a person is approved to travel by rental car, train or air, the City will cover the cost of first class return train fare, economy return airfare or full rental of a sub-compact car.

- 4.8 If a person is approved to travel by train or air, the City will cover reasonable costs to and from the hotel and terminal.
- 4.9 Where an authorized individual has access to a City owned vehicle, such vehicle should be utilized for the purposes of travel, where feasible.
- 4.10 A detailed log must be kept by employees driving City owned vehicles and provide it to management upon request.
- 4.11 Employees, other than Fire Department employees, using their own vehicles for approved work related business may claim mileage from the lesser distance from either the employee's normal place of work to approved destination or from employee's home to approved destination.
- 4.12 City employees who use their own vehicles for City business are advised to carry a minimum \$2,000,000 liability limit and to ensure that their insurer is aware that their vehicle is used for city business and that it is rated correctly for that use and that the employee review their Automobile Accident Benefit limits to ensure that those limits satisfy their individual needs.

5.0 MEALS AND INCIDENTALS:

- 5.1 An elected official or employee attending approved functions shall be eligible for reimbursement of actual expenses for meals plus taxes and gratuities.
- 5.2 Original itemized receipts (showing HST) will be required for meals.
- 5.3 If more than one staff are present at a meal and there is one bill, the most senior staff person will make the claim for the meal.

6.0 ACCOMMODATION:

- 6.1 An elected official or employee attending approved functions shall be eligible for reimbursement of actual hotel rate charged for single/double room plus tax.
- 6.2 The Head of Council may upgrade his or her room for the purposes of hosting meetings and delegations. Such upgrades must be reasonable in the circumstances.
- 6.3 If a member of council registers for a conference, convention, training course or workshop 45 days beyond notification to council on Order of the Day and cannot be accommodated at least at the standard convention rate, any additional costs over and above such standard rate shall not be reimbursed.
- 6.4 Accommodation expenses are only eligible within any or all of the following periods:
- the actual days of the conference, convention, training course or workshop;
 - the day previous if the function begins before noon;

- the day following if the function ends after 6:00 p.m.;
- additional days required for travel if authorized by the Chief Administrative Officer for staff and the Mayor for members of Council.

6.5 Employees who elect to stay at a private residence instead of a hotel while travelling on City business are eligible to be paid a \$30 per day per diem in lieu of hotel/motel accommodations.

7.0 REGISTRATION:

7.1 An elected official or employee attending approved functions shall have the actual amount of the registration fee paid by the City of Stratford. Registration fees for companions will be the responsibility of elected official or employee.

8.0 ADVANCES:

8.1 Travel advances may be given in respect to this policy provided that the Director of Corporate Services has ten days advance notice and is properly authorized in accordance with this policy.

8.2 The applicant is liable for the whole amount until the expenditure for which it is being requested is approved.

8.3 Any unexpended advance must be repaid within thirty days of the last day of the conference or convention.

8.4 Advance requests and reimbursement claims shall be in the format prescribed by the Director of Corporate Services.

9.0 INELIGIBLE EXPENSES:

9.1 Ineligible expenses include:

- Spousal or family expenses other than that detailed in the policy;
- Personal entertainment (hotel bar charges, movies, etc);
- Personal side trips while travelling;
- Flight insurance premiums;
- Charges for excessive personal luggage;
- Meals which have already been paid for as part of the conference package.

10.0 LOCAL BOARDS AND CITIZENS:

10.1 These policies will apply to members of local boards, with the exception of the Police Services Board and Library Board who are governed by their own policies, and other

citizens with necessary modifications, provided that prior approval is received either through the budget process or by resolution of Council.

11.0 OTHER MATTERS:

- 11.1 Receipts are required, except where noted, wherever possible, to justify expenses.
- 11.2 Where an elected official or employee is registered to attend a function, every reasonable effort shall be made by the registered participant to give appropriate notification of cancellation. Notification should be directed to the approval authority.
- 11.3 Elected officials attending conferences or conventions shall report, either verbally or in writing, to City Council on the benefits of attending the function as soon as practical.
- 11.4 Any conventions, conferences, training courses and workshops outside the Province of Ontario and within North America shall not exceed one per year for any individual elected official and no more than two shall attend any one function outside the Province of Ontario. The only exception is where the elected official has been invited to participate and the costs are substantially covered by the organization extending the invitation. Any functions outside North America must be approved by resolution of Council.
- 11.5 Any conventions, conferences, training courses and workshops outside the Province of Ontario and within North America shall not exceed one per year for any member of staff and no more than one staff member may attend any one function outside the Province. The only exception is where the staff member has been invited to participate and the costs are substantially covered by the organization extending the invitation. Any functions outside North America must be approved by resolution of Council.
- 11.6 The limitations in clauses 11.4 and 11.5 do not apply to elected officials and employees who sit on national boards and committees who meet regularly throughout the year.
- 11.7 It is recognized that, from time to time, circumstances may arise that cannot be tied to the preceding guidelines and that, in the case of staff, the chief administrative officer and, in the case of the Council or the chief administrative officer, the mayor shall have discretion to make minor exceptions to the policy that, in their opinion, fall within the overall intent of the policy.
- 11.8 The Director of Corporate Services has responsibility for monitoring this policy.
- 11.9 This policy is effective immediately upon passage by Council.