

## **OBSI Travel and Entertainment Expense Policy**

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**The following draft expense policy is proposed to cover all OBSI staff and Board directors. For recommendation to the Board for approval.**

### **Travel and Entertainment Expense Policy**

OBSI allows employees and Board directors flexibility when making their travel arrangements. OBSI will reimburse employees for reasonable expenses incurred while conducting business.

All OBSI-paid travel outside of Canada requires the formal approval of the Board Chair in advance of booking a trip (all requests are to be submitted in writing).

For greater clarity, these policies apply to both OBSI employees and to travel of non-staff representatives of OBSI (including Board directors), where OBSI will pay the cost of travel.

### **Per Diems**

Per Diem rates are not provided to employees. Board director per diem rates are set by the Board of Directors.

### **Travel**

- OBSI will reimburse employees for business travel. All travel must have the prior approval of the Ombudsman or Senior Deputy Ombudsman.
- If required, employees and Board directors can obtain a cash advance to cover the cost of the trip.

### **Airfare**

- When possible, employees are asked to book at least 15 days in advance and achieve the best possible rate.
- All employees are expected to fly economy class at all times for travel within Canada and the United States unless upgraded to Business Class at no cost to OBSI. Business class travel for flights outside of Canada and the United States require the prior approval of the Board Chair.
- Whenever possible, meetings should be arranged so that all destinations are linked to reduce the overall cost of the trip.
- OBSI encourages, but does not require, the use of the lowest fare offered.

## **Ground Transportation and Parking**

- Taxi/limousine service to and from airports and taxis for meetings, etc. will be reimbursed and receipts are required. Receipts for parking fees are also required. Consideration should be given, where possible, to share taxis or use public transportation where feasible.
- The employee's manager is to approve car rentals prior to booking
- Use of one's own car is permitted and OBSI will reimburse employees and Board Directors at a rate per kilometer consistent with industry practice (currently \$0.52 per km).

## **Meals**

- General guidelines for meal reimbursements can be obtained from the Manager, Administration. The overall guideline is one of validity of the claim as during international travel, the cost of meals can vary from country to country.

## **Hotels**

- For all travel, employees are expected to seek comfortable and convenient (to the location of the meeting) accommodations. If the cost of the room appears excessive, the approval of the Ombudsman or Senior Deputy Ombudsman must be obtained in advance of the trip.

## **Special Arrangements**

- An employee may be able to obtain reduced fares and encounter substantial savings by taking advantage of chartered flights and similar forms of transportation. In so doing, the employee may be required to extend their stay beyond the required business time for the trip. If this occurs, OBSI will consider reimbursing the additional cost of meals and hotels subject to the following conditions:
  - Up to six nights' hotel cost;
  - Up to seven days for meals;
  - Any additional days taken over and above the time required for the trip would be taken as vacation;
  - Full details of travel expenses must be submitted to the Ombudsman or Senior Deputy Ombudsman for prior approval;
  - Approval is dependent upon the savings to OBSI over the cost of a normal trip and the individual's own workload.
- Should a friend or spouse accompany an employee or Board director, the guest is expected to pay their costs, all meals and the difference between a single and double room rate. Any savings on airfare are not to be used to defray the accompanying guest's airfare.

## **Entertainment**

- OBSI management may be called upon to entertain individuals from special interest groups for business purposes. Reasonable expenses will be reimbursed.
- All other employees should obtain the approval of the Ombudsman or Senior Deputy Ombudsman prior to entertaining clients.

## **Guidelines**

- Contact OBSI's Manager, Administration for current guidelines for hotel and meal costs.
- All claims for travel and entertainment expenses should be submitted on OBSI's Expense Statement form and signed by the appropriate manager. These statements should be submitted to Accounting within two weeks of the trip or event.
- All claims for international travel reimbursement must include the Board Chair's written approval documentation.
- Receipts are required for reimbursement.