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1.        The following individuals/entities may claim expenses as follows:

**1.1 National Conference/Annual General Meeting**

- 1.1.1    National Executive (President, Vice President, Immediate Past President, Secretary, Treasurer), in line with item 2 below
  - 1.1.1.1    Financial support for travel and accommodation for the President and their Partner will be budgeted as part of the Annual Budget. . Registration to attend the conference events, usually the companion program, for the Partner, shall also be budgeted.
  - 1.1.1.2    Financial support for the Vice President, Immediate Past President, Secretary and Treasurer will be budgeted as required. Support will be upon request and when approved in the Annual Budget .
  - 1.1.1.3    Registration and additional hotel costs for any pre or post conference workshops or events (golf, sightseeing, etc.) are the responsibility of the member or their employer.
  
- 1.1.2    Chapter Chairs
  - 1.1.2.1.    Chapter Chairs, as members of the CHES Board of Directors, are expected to receive financial support through their Chapter for travel and accommodation to attend the National Conference including any Board of Directors meetings or strategic planning .
  - 1.1.2.2    Conference Planning Committee for the National Conference
    - 1.1.2.2.1    The Committee will receive 5 complimentary registrations to the National Conference. The Chair of the Conference Planning Committee shall decide to whom these registrations should be assigned and inform the National Office.
  
- 1.1.3    Board Members
  - 1.1.3.1    If a meeting of the National Board is scheduled on a day prior to, or following the National Conference, CHES National will provide financial support for additional meals and accommodation for those extra days for all Board members.
  
- 1.1.4    Committee Chairs:
  - 1.1.4.1    Financial support for the Committee Chairs will be budgeted as required. Support will be upon the request and when approved in the Annual Budget.

**1.2 Representative to a Chapter Meeting, Regulatory Body, or External Event**

- 1.2.1    It is expected that the CHES President (or Executive member delegated) will represent CHES at international event including at either one of the annual ASHE Conferences (Innovation Conference or the Project Design Conference) and at the bi-annual IFHE congress or should a required in-person meeting be called for of

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IFHE Member A representative to attend, when budgeted and approved by the CHES Board of Directors. It is normally expected that the President annually attend one of the ASHE events and bi-annually the IFHE Congress.

- 1.2.1.1    When attending these events, the expenses for the President (or designate) will be reimbursed as per item 2.1 below.
- 1.2.1.2    For an IFHE congress expenses for the President's (or delegate's) partner will be reimbursed as per item 2.1 below.
  
- 1.2.2    The CHES President (or Executive member delegated) is expected to attend all Chapter conferences and will be budgeted as required. Support will be upon request and when approved in the Annual Budget.
  
- 1.2.3    Any appointed CHES representative who must attend a meeting of a standards setting committee or body, any partner association meetings, or other related CHES business, will be budgeted as required. Support will be upon the request and when approved in the Annual Budget.
  
- 1.2.4    Any representative at an event external to CHES must be authorized in advance by the CHES Board of Directors.
  
- 1.2.5    Any unbudgeted event must be authorized in advance according to Policy 5.5, In Year Budget Adjustment .

**2. Reimbursable Expenses**

- 2.1 Reimbursement will be given for all reasonable expenses in accordance with the guideline attached:
  
- 2.2 Costs for laundry, dry cleaning, or sundry or entertainment expenses will not be reimbursable.
  
- 2.3 If the trip is prolonged for personal reasons reimbursement will support only the business portion of the trip.

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**3. Process for Reimbursement**

- 3.1 The CHES National Report on Expenses form is used to submit expenses following the trip, and must be accompanied by receipts to support the expenditure. Expense form to be submitted to the National Office for approval by the CHES Treasurer. In the event that the expenses have been incurred by the National Treasurer, the National Office will submit to the National President for approval.
- 3.2 The CHES National Report on Expenses form must be used to list estimated expense for last-minute trips that are authorized after the budget is set. The form shall be submitted in advance of the trip to the CHES Treasurer. The Treasurer will notify the submitter whether the expenses are approved.
- 3.3 If the expenses significantly exceed the approved estimate submitted to the Treasurer, an explanation must accompany the Report on Expenses form.

Approved by: \_\_\_\_\_  
 President

Date: \_\_\_\_\_

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**Appendix A:  
CHES National Travel Guideline**

The gaps or issues we are trying to address with changes to the policy and this guideline (attached as an Appendix) are as follows:

- a) clarify that all CHES National funded travel regardless of the persons standing within CHES, is covered (by CHES Executive, CHES representatives on CSA committees, CHES representatives to other conferences, CHES award winners)
- b) clarify the class/level of air travel and hotels which should be budgeted for and booked
- c) clarify how personal expenses will be reimbursed and at what level/rate (food normally at per diem rates, personal vehicle use, other forms of travel)

Refer to CHES Policy B5.1 Expense & Travel Policy for actual policy language.

- This guideline shall be adhered to during the budgeting process, when booking travel and when seeking reimbursement for travel.
  - Should a variation be requested/required at time of budgeting, the variation must be requested to the Treasurer and noted for consideration during the budgeting process.
  - Once approved during budgeting this is the maximum reimbursable cost. Any need to adjust the budget amount subsequently requires financial approval as per CHES Policy 5.5 In Year Budget Adjustment Process
- Booking & reimbursement: when booking and seeking reimbursement for travel, variations from this guideline (even if still operating within the approved budget amount) must be pre-approved prior to the travel as per policy 5.1 (or in extenuating circumstances with reasonable notice after the expense is incurred). Approval will follow Policy 5.5 In Year Budget Adjustment Process.
- Travelers can book outside of this guideline (higher class fares/seat, higher quality hotel, meals outside of the recommended per diem rates, etc.) as long as they personally cover the cost difference.

**1. Flights**

1.1. The standard reimbursement will be for economy flights except for any flight greater than 6 hours (see 1.3.1).

1.1.1. Book the most economical ticket which allows for changes or would at least recognize the full value of the flight, even though there may be a change fee (i.e. do not book a ticket which does not allow for flight changes even though the price maybe attractive).

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- 1.1.2. Booking a fully refundable ticket is not necessary (CHES accepts the risk if full or partial flight cost is lost due to trip cancellation, personal situations arising which result in the person not being able to fly, etc.).
- 1.1.3. Flights which include bundled seat selection and baggage fees should be considered as these may offer good value.
- 1.2. Cost of baggage is reimbursed.
- 1.3. Pre-paid & pre-selected seat selection is reimbursed.
  - 1.3.1. Where the one-way in-air flying time of a trip is cumulative 3 hours in a day, booking with a seat selection on upgrade above basic (i.e. an extended leg room seat including exit row) is allowed.
  - 1.3.2. Where a single flight is over 6 hours, the cost for a seat selection two seat upgrades above a regular economy flight/seat selection can be booked.
  - 1.3.3. When a traveler intends to exercise these options this shall be submitted during the budgeting process, or if requested after annual budgeting, a request to the Treasurer prior to travel indicating the specific options desired and its associated cost requires pre-approval .
- 1.4. When travelling overseas, sufficient time to recover from jet lag in order to effectively participate in the event should be factored in travel plans; this normally means up to 2 days of accommodations and per diems prior to the engagement;
- 1.5. In certain long flight situations, when considering the cost of an Economy ticket, plus seat selection, baggage, etc. a business class ticket may provide better value. This can be considered with approvals as per policy.

**2. Meal Reimbursement:**

- 2.1. The start of a trip begins at departure from the traveler's residence and anytime up to and including when returning to the traveler's residence (and all time between).
- 2.2. The following per-diem rates should be used as a guide for budgeting and reimbursement.
  - 2.2.1. Where attending an event which includes meals, suggested per diems are to be followed for the meals claimed.
  - 2.2.2. All meals will require proof of receipt.
  - 2.2.3. Tip (maximum of 20%) will be reimbursed.
  - 2.2.4. Meals should be from a reasonably priced restaurant.
  - 2.2.5. Only entrée's and single beverages will be reimbursed.

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2.2.6. Per-diem guide (set in 2024) is as follows:

Country	Breakfast	Lunch	Supper	Daily per-diem
Canada	\$30	\$35	\$70	\$135
USA (in USD)	\$30	\$35	\$70	\$135 USD (converted a current rate)
Other (in equivalent Cdn)				
	<i>Includes tips</i>			

2.3. When per-diem rates are not appropriate (due to high location costs) ideally these should be provided at time of budgeting. If this has not occurred, and the traveler meal costs greatly exceed (by 20%) the total trip per-diem budget, then this needs to be disclosed at the time of budgeting.

**3. Accommodations:**

- 3.1. Where attending a conference, the accommodations should be booked at the conference hotel and with the conference rate.
  - 3.1.1. Where the conference hotel is not available, it is expected that the traveler finds a suitable option within the same hotel quality.
- 3.2. Room type chosen shall be the standard room.
  - 3.2.1. Upgrades for higher floors, views, suites, etc. are not reimbursed, or the differential paid personally.
- 3.3. If staying in a residence of personal friend, no reimbursement is provided.
- 3.4. If staying within a 45-minute trip from travelers' personal residence, no reimbursement is provided.
- 3.5. Do not use non-refundable or pre-paid hotel rates to gain a lower price.
  - 3.5.1. Guaranteeing bookings with a 24-48-hour cancellation penalty is a normal practice.
  - 3.5.2. Some conference arrangements require a deposit longer cancellation periods, these will be reimbursed when the expense is incurred.
  - 3.5.3. CHES accepts the risk if full or partial guarantee loss due to trip cancellation, personal situations arising which result in the person not being able to attend, etc.
- 3.6. Where a traveler chooses an alternate accommodation arrangement (including Hostel, Airbnb, VRBO, etc.) reimbursement with receipt will be provided up to the price of the conference accommodation.

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**4. Transportation to, and parking at departure airport:**

- 4.1. Mileage to/from traveler's house can be claimed for reimbursement using mileage rates noted in Guideline point 6.
- 4.2. Where use of a public transit, common carrier (taxi, Uber), shuttle is used to/from the departure airport, reimbursement will be made upon receipt with maximum 20% tip if appropriate.

**5. Transportation (non-personal vehicle):**

- 5.1. Where use of public transit, common carrier or a shuttle is used to/from the destination airport and the destination location (hotel, conference site, etc.) reimbursement will be made upon receipt with a maximum 20% tip if appropriate.
- 5.2. Where use of public transit or a common carrier is used while attending the conference is required (to go from conference centre to hotel, to restaurants, etc.) reimbursement will be made upon receipt with a maximum 20% tip if appropriate.
- 5.3. Where using a rental car is the only reasonable option for transport (i.e. where distance from destination airport to destination event requires driving "out of town", etc.) cost for the rental car (rental, fuel, insurance) and parking costs, reimbursement will be made upon receipt.
- 5.4. Where the traveler chooses to rent a car, or purchase a multi-day public transit pass, etc. tied to an extended personal stay, pro-rated reimbursement will be provided (i.e. if staying for a total of 7 days with a 3-day conference, where one day ahead of the conference and one day the conference for return travel) transportation will be reimbursed at a rate no more than 5 day rate (should the longer rental or public transit pass be cheaper than the 5 day rate, the longer rental will be reimbursed).

**6. Personal vehicle usage:**

- 6.1. Where a personal vehicle is used, mileage any associated parking fees and tolls will be reimbursed.
- 6.2. The reimbursement rate shall align with the published Government of Canada reimbursement rates found: [Automobile allowance rates - Canada.ca](https://www.canada.ca/en/revenue-agency/services/tax/individuals/pages/automobile-allowance-rates.aspx)
- 6.3. Where there is damage to a personal vehicle, whether parked or in transit, any deductible or damage costs are the responsibility of the traveler/driver.
- 6.4. Where a traveler wishes to drive their personal vehicle in lieu of flying, reimbursement will be capped at the cost of a flight.
- 6.5. Where there are no reasonable flight options, travelers can either rent a vehicle (as per the Guideline section below) or using their own personal vehicle capped at the cost of the rental, but no greater than the personal mileage reimbursement.

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**7. Travel Rewards Programs:**

- 7.1. The points earned while travelling (flights, hotels, car service, points earned on credit cards, etc.) on CHES reimbursed travel can be kept by the traveler.
- 7.2. Upgrades beyond those covered in the Guideline sections, solely to provide extra travel reward points are not reimbursed.
- 7.3. The annual fee for a travel rewards credit card is the responsibility of the traveler.

**8. Travel Costs & Reimbursement:**

- 8.1. Expenses pre-paid prior to the trip (e.g. airfare and conference registration) can be submitted for reimbursement prior to departure when the expense is incurred.
- 8.2. Submit for all other expenses incurred during the trip in a timely enough manner after the trip to allow for reimbursement processing by CHES.
  - 8.2.1. CHES does not issue an advance payment to cover travel expenses which will occur during the travel.
- 8.3. CHES will not cover interest expenses on the traveler's credit cards resulting from late payments after the travel (i.e. timely submission of expenses is the traveler's responsibility).
- 8.4. Travel expenses will be reimbursed in the equivalent Canadian funds.
  - 8.4.1. Where foreign expenses are incurred on a credit card, use the exact conversion rate from the credit card statement on the day.
  - 8.4.2. Where foreign expenses are incurred from a cash transaction, use the conversion rate at which the foreign cash was purchased on that day.



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**Appendix B:**

**Reimbursement Template:**

To be provided and updated by CHES National Office