

## WACC POLICY

# TRAVEL

*Issued by the General Secretary*

*Revised October 2010*

Staff travel is a major cost for WACC. The primary purpose of this policy is to ensure that the cost of travel is managed appropriately. It is the Association's intention that travel costs be limited in so far as is practical, without compromising the health and safety of staff, ensuring that the organisation's needs are met, and taking into account the requirements of travellers.

WACC will cover the cost of all approved travel undertaken for the benefit of the Association, including reimbursing travellers for any reasonable out-of-pocket expenses that they may incur while travelling, provided that such travel is undertaken in compliance with the provisions of this policy.

## Planning

In order to ensure optimum use of the travel budget, those members of staff who travel regularly on behalf of the Association must develop, before the start of each calendar year, a proposed annual travel plan. This plan should be prepared in consultation with the appropriate Director and/or the General Secretary. The purpose of the planning exercise is to ensure that optimum use is made of the travel budget by limiting travel to those trips that provide the most value to WACC.

Inclusion of a trip on the travel plan is no guarantee that it will be approved, as priorities and available funding may change. Employees must not commit to any travel until such time as approval has been received.

A database is available for recording travel plans at W:\Forms\TravelPlan.

## Approval

All travel undertaken on behalf of WACC requires the prior approval of the General Secretary. This should be secured at the earliest opportunity, generally as soon as location and dates are known, by completing a Travel Proposal Form. Advance planning will avoid the need to have travel proposals approved by an Acting General Secretary, except in an emergency.

The sections of the Travel Proposal Form relating to the costs and benefits of travel must be completed in full and as accurately as possible, so that it can be determined if the expenditure is justified by the benefits available. The Manager of Administration can assist in providing estimates of travel costs.

An employee should only submit a Travel Proposal Form if he or she believes that the expenditure is justified. If there is any doubt about this, the matter should be discussed with the employee's supervisor before the form is completed.

Completed and approved Travel Proposal Forms will be passed to the Manager of Administration.

## **Booking**

Long distance travel will normally be booked by the Manager of Administration through WACC's appointed travel agent. The bookings will be made in consultation with the staff member who is travelling. Employees should be prepared to identify the flexibility available in their travel plans in order that less expensive alternatives may be considered.

If actual travel costs are found to be more than 10% greater than the cost estimated on the Travel Proposal Form, the approval of the General Secretary will be required before the booking can be confirmed.

## **Accommodation**

Except for events organised by WACC, and where hotels are easily and appropriately booked in conjunction with travel bookings, employees are responsible for arranging their own accommodation while travelling. Whenever possible, this should be done in consultation with local hosts. Accommodation should be selected to limit costs, with hotels usually being no more than 3-star rated or equivalent.

When WACC is covering the cost, hotels expenses should either be prepaid or settled on departure.

The attention of staff is drawn to the provisions of the Conflict of Interest Policy which may be relevant when booking accommodation.

## **Cost Control**

Unless otherwise approved by the General Secretary, travel will be arranged to minimise total costs, taking into account efficiency and safety. This means that flights will usually be economy class, with arrival no more than one day in advance of commitments and departure as soon after commitments end as is practicable. When it is possible to save on airfare by extending a stay, this will only be acceptable if the savings can be shown to be significantly more<sup>1</sup> than all other costs that will be incurred, such as for accommodation and meals.

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<sup>1</sup> What is significant should be determined by considering the time that the employee will not be available for work as a result of the extended travel.

Employees will not be required to travel on lesser-known airlines or to accept routings with multiple connections when alternatives are available at reasonable cost.

Employees may opt for a particular carrier, mode of travel, schedule, or routing if the cost is no more than 5% greater than the alternative that would otherwise be selected.

In general, lower-cost airfares are available by booking earlier. However, it must be recognised that such fares are not always fully refundable or able to be modified. Employees should, therefore, make every effort to finalise their travel plans early, and make bookings immediately thereafter. Once bookings are made, there can be no modifications, if this will incur any additional cost, without the approval of the General Secretary.

### **Travel Incentives**

Employees may keep any frequent flyer benefits that they accrue while travelling on behalf of WACC. It should be noted that the Association will not be responsible for any tax liability that may result from the use of such benefits.

Any other incentives offered in conjunction with travel paid for by WACC must be reported and will usually become the property of WACC. Where possible, incentives are to be used to offset the cost of travel on behalf of the Association.

### **Safety**

Whenever possible, no more than two WACC employees should travel on the same flight. Flights on non-commercial aircraft should be avoided. WACC will not permit employees to travel on behalf of the Association on any flight where they are a part of the crew. Any exceptions to these guidelines must be pre-approved by the General Secretary.

All staff travelling on WACC business must provide the Manager of Administration with a copy of their itinerary and contact details while travelling.

### **Local Travel**

Whenever possible, public transport (trains and buses) should be used for local travel, when transport is not otherwise provided<sup>2</sup>. However, it is recognised that this may not always be practical or desirable, for example because of time constraints or late at night, and staff are expected to use discretion to limit expenses.

Rail travel should, if possible, be booked in advance. Airport buses should be used in preference to taxis. Rental cars, which should be avoided unless it can be demonstrated that their use is cost effective, must be booked in advance, with the vehicle being returned to the location from which it was rented, wherever possible.

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<sup>2</sup> For example by the local hosts or by a hotel.

The cost of travel from an employee's home to an airport or other embarkation point must be included in the cost estimates on the Travel Proposal Form. Airport parking, if required, is a part of the travel cost.

## Employees' Vehicles

The use of an employee's personal vehicle may be authorised for travel on WACC business. In such cases, the employee will receive reimbursement for the distance travelled at a standard rate which will be established from time-to-time by the General Secretary (with reference to the rate used by the United Church of Canada).

At July 2010 the rate for reimbursement is 0.41 CAD per kilometre.

## Expenses

Staff travelling on WACC business will often incur out-of-pocket expenses. Per diem allowances made to staff are intended to cover such expenses, and reimbursement will, therefore, only be considered for expenses which exceed the total per diem allowance for the trip. For any trip, an employee may claim per diem expenses or actual expenses but not both. Employees are expected to retain records of all expenses in order to be able to support claims for amounts over the per diem allowance. Where no additional expenses are claimed, no receipts are required to justify per diem allowances. Per diem allowances are not paid where most expenses are pre-paid by WACC or by another organisation, or are included in the registration fee.

Expense claims should be submitted promptly after the completion of travel. The following expenses will not normally be reimbursed:

- Mini-bar charges
- In-room TV or video charges
- Personal telephone calls (except for short duration calls to home no more often than once each four days during trips lasting longer than four days)
- Room service (except following late arrival and when no other food is readily available)
- Laundry (except where a trip is longer than seven days)
- Entertainment (except with the prior approval of the General Secretary<sup>3</sup>)

Gratuities paid may be reclaimed without a receipt, provided that they are reasonable and that service has not been included in the bill. Other expenses may be reimbursed without receipts at the discretion of the General Secretary.

At July 2010 the per diem rate is 40.00 CAD.

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<sup>3</sup> The General Secretary may issue blanket exemptions to specific members of staff.

## **Credit Cards**

Employees who have WACC credit cards should use them to pay for expenses incurred in conjunction with travel. They should not be used for any expenses that might be covered by the per diem allowance. Any use of credit cards not related to travel requires the prior approval of the General Secretary<sup>3</sup>. Credit cards may not be used for personal expenses, except in an emergency that arises in conjunction with travel on behalf of WACC.

## **Advances**

A cash advance may be made available to cover anticipated cash expenses when such expenses are expected to be significant, eg when travelling in areas where credit cards are not accepted. Advances must be requested at least two weeks prior to departure, submitted to the General Secretary for approval, be for previously approved travel, and not be for more than the anticipated maximum required.

## **Insurance**

WACC carries travel insurance which covers, among other things: loss or damage to luggage, essential replacement of lost or damaged items, loss or damage to money or travellers cheques, personal accident, medical and related expenses, personal liability and cost due to departure delays. Claims for losses incurred by employees must be made through the Manager of Administration, who must also be notified of any occurrence that might be the basis for WACC making a claim against this insurance.

Any loss of baggage while travelling by air must be reported to airline and airport officials. Any theft must be reported promptly to the local police.

## **En Route Changes**

Changes in itinerary can be very expensive and must, therefore, be avoided unless absolutely necessary. If an employee finds it essential to make changes to their travel plans once a trip has commenced, they must ensure that the Manager of Administration is advised at the earliest opportunity.

## **Cancellation**

If, for any reason, a trip or any portion of a trip has to be cancelled, it is essential that the carrier and hotels be notified at the earliest opportunity in order to maximise the available refund, if any, that can be secured. All unused tickets and coupons must be returned promptly to the Manager of Administration.

## **Holiday in Conjunction with Travel**

When an employee chooses to take leave in conjunction with business travel, all additional expenses incurred beyond those that are related to WACC business are the

responsibility of the employee. However, when the extension of the duration of a trip to facilitate a holiday results in an increase in airfare of not more than 5%, WACC will cover the additional cost. The sum of any increase in fare price relating to a holiday and the variation contemplated in the section on Cost Control must not exceed 5%.

Employees who intend to pursue any personal business interests while travelling at WACC's expense must supply the General Secretary with full details and provide assurance that this will not interfere with pursuing WACC business.

## **Time off in Lieu**

Time off in lieu after travelling on behalf of WACC is governed by the Employee Leave Policy.

## **Other Travel**

Where WACC is paying for travel by non-employees, the general principles of this policy will apply.

Employees taking Home Leave must comply with the provisions of this policy.

Where WACC is booking travel for employees and the cost of such travel is to be underwritten by others, this policy will apply, subject to any relevant policies of the funding organisation. In such cases, any additional cost that WACC might incur as a result of applying the provisions of this policy requires the approval of the General Secretary.