

Section	Expenditures
Policy:	FP 2.05 Travel, Meals & Hospitality Expenses Policy
Effective Date:	April 1, 2009; Revised Dec. 01, 2010; Apr.01, 2014; Jan.01, 2019
Revised:	Oct 2025

1 POLICY

- 1.01 Employees approved to travel on agency business are representing the organization. They are expected to conduct themselves with dignity and behave ethically at all times.
- 1.02 Expenses incurred on agency trips should be consistent with normal living standards. Those who are in doubt as to the appropriateness of a specific travel expense should consult with their supervisor for guidance.

2 PURPOSE

- 2.01 The purpose of this Statement of Policy and Procedure is to guide all employees who travel on agency business.

3 SCOPE

- 3.01 The Travel Expenses policy applies to all employees, volunteers, and students travelling on approved agency business and their supervisors.

4 RESPONSIBILITY

- 4.01 **Every person travelling on agency business is responsible for:**
- Behaving as a representative of the agency at all times
 - Obtaining prior approval to incur expenses
 - Considering other options for meetings before travel is approved, including audio or video conferencing
 - Following agency procedures and guidelines for expenses
 - Retaining all receipts
- 4.02 **Operating department supervisors are responsible for:**
- Reviewing and approving all travel expenses submitted by the travelling personnel
 - Guiding appropriate types and levels of expenses
- 4.03 **The Finance Department is responsible for:**
- Ensuring that travel expenses are properly authorized
 - Ensuring that travel expenses are processed promptly

5 DEFINITIONS

- 5.01 Mileage allowance means the payment to the individuals who use their own personal vehicles for agency-approved travel based on a flat rate per kilometre (also referred to as "mileage").

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5.02 Meal rate means the payment for meals when away from assigned office(s) or location(s) on agency business.

6 REFERENCES and RELATED STATEMENTS of POLICY and PROCEDURE

FP 2.01 Expense Authorization Policy FP 2.03

Company Credit Cards Policy

FP 2.04 Expense Advances and Expense Allowances Policy

7 PROCEDURES

7.01 Allowable Travel Expenses

In general, the agency recognizes the following as normal travel expenses:

- a) Economy class air fares/train or bus tickets to the city of destination or if the estimated costs are expected to be less, a rental car for travel to the city of destination
- b) Travel insurance
- c) Airport fees
- d) Lodging in the city of destination
- e) Personal meals and associated tips
- f) Telephone calls home of a reasonable duration, telephone calls to the office and telephone calls with clients or business contacts. Wherever possible, you are expected to use the least expensive means of communication, such as calling cards or Internet.
- g) Taxi fares, to and from destinations, within a city and associated tips or, if the estimated costs are expected to be less, a rental car in the destination city
- h) Parking and gasoline charges in the case where a rental car has been deemed appropriate (for use of personal car for business travel, see 7.06 below)
- i) Minor miscellaneous expenses which would not otherwise be incurred by the employee, such as tips in a hotel, or public transportation costs
- j) Expenses for a group can only be claimed by the most senior person present In general, the agency does not reimburse for:
 - *Entertainment in the city of destination*
 - *Alcoholic purchases*
 - *Upgrades to higher classes of service for air or train travel*
 - *Fines for traffic or parking violations*
 - *Personal items of any nature, including clothing or toiletries*
 - *Additional expenses related to travelling with a spouse or other guest*
 - *Fees for excess baggage or baggage handling*

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7.02 **Exceptional Expenditures**

The Executive Team may be required to participate in stakeholder entertainment activities such as meals, social events, client golf tournaments, etc., for public relations or stakeholder purposes. The agency will reimburse these expenses. (See more in 8 Hospitality).

7.03 **Gifts in Lieu**

When a person travelling on agency business has an opportunity to lodge with a friend or relative and, in doing so, will reduce the overall cost to the agency, a gift in lieu may be purchased at agency expense. Gifts are expected to be symbolic in nature and not exceed \$50.00.

7.04 **Credit Card Points**

Approved employees with Company Credit Cards with Point programs are required to use Company Credit Cards rather than their own personal Point Cards. Those without Company Credit Cards may participate to personal advantage in their own Point programs as long as all decisions regarding carriers are made first with due regard to the best available flight prices and times.

7.05 **Price Advantages for staying over into a Weekend**

Many airlines offer deep discounts for travellers willing to return on a Saturday or Sunday. Where this discount benefits the agency, the traveller has the option of taking advantage of it. In these cases, normal meal and lodging expenses will be considered reimbursable.

7.06 **Use of Personal Car for Business Travel**

- a) An employee, volunteer or student has the option of using their personal car for business travel as long as they have minimum insurance coverage of at least \$1,000,000 for both personal injury and third-party liability.
- b) The agency will not reimburse the costs of insurance coverage for business use, physical damage or liability. In the event of an accident, you will not be permitted to make a claim to the agency for any resulting damages.
- c) Mileage expenses to and from work will not be reimbursed. For clarity, work is considered any Springboard location. However, if an employee makes multiple travel destinations during the course of their work duties in a day, the mileage accrued throughout the day, less the first and last destinations, will be reimbursed.
- d) At the discretion of the CEO or designate, an employee may be reimbursed for expenses incurred for road, ferry, or bridge tolls if there was no reasonable alternate route that an employee could have taken or there was need to get from one location to another in the shortest time possible.

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- e) Parking fees may be reimbursed when employees use their personal vehicles in the course of the work only if an explanation of the parking is provided on the Expense Claim Form, along with the original parking receipt attached and approved by a supervisor.
- f) To be eligible for mileage expense reimbursement as outlined in this policy, an employee must complete an Expense Claim Form and clearly indicate the number of kilometres travelled, the destination(s), and the purpose for the travel. Incomplete Expense Claim Forms will not be processed.

The agency reimburses mileage at a rate of \$0.46 per kilometre for Southern Ontario.

7.07 **Meal Rates for Travel Away From Assigned Office/ Location**

An employee, volunteer or student who travels away from their assigned office(s) or location(s) (i.e., at least 24 km) over a normal meal period on agency business is entitled to claim a reimbursement for meal expenses.

Meal expenses will be reimbursed at the established meal reimbursement rates, regardless of the actual meal costs, as follows:

- a) Breakfast - \$10.00
- b) Lunch - \$15.00
- c) Dinner - \$25.00

This is a meal allowance. Taxes and gratuities are included in the meal reimbursement rates.

Meals must be purchased in order to be able to submit a claim for reimbursement.

In limited and exceptional circumstances (e.g., health considerations; limited options available) where a meal expense is higher than the meal reimbursement rate, the actual cost of the meal may be reimbursed. In this situation, the claim for meal reimbursement must be accompanied by an original itemized receipt and a written rationale for exceeding the rate. A credit card slip is not sufficient.

Approval is subject to managerial discretion.

7.08 **Dependent Care**

A dependent is a person who resides with the traveller on a full-time basis and relies on the traveller for care (e.g., a child or parent). Prior approval for reimbursement of dependent care expenses is required, as well as a written

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explanation of the circumstances. Requests for dependent care expenses may be reimbursed under the following circumstances:

- if travel is occasional or unexpected, and
- if expenses are incurred above and beyond usual costs for dependent care as a direct result of travel.

In these situations, the employee may be reimbursed for actual costs up to a daily maximum of:

- \$75/day, with a caregiver receipt or
- \$35/day, with a written explanation.

7.09 **Documentation of Travel Expenses**

The organization expects all receipts to be retained and submitted with an Expense report and subsequently, with the company credit card statement if applicable.

All receipts should indicate the nature of the expense, the date, the location and the client on whose business it was incurred.

HST should be identified for all expenses on which it was incurred

Only receipts which have been approved by the person's supervisor will be reimbursed.

Expenses for which a receipt has been lost or misplaced will be reimbursed only at the discretion of the person's supervisor and are subject to review by the Finance Department and the CEO.

8 HOSPITALITY

8.1

Hospitality is the provision of food, beverages, accommodation, transportation, or other amenities at Springboard's expense to people who are not engaged in work for Springboard where there is a benefit to Springboard for such hospitality.

- a) Hospitality will be provided in an economical, consistent and appropriate manner that facilitates the agency's business or is desirable as a matter of courtesy.
- b) Hospitality may be extended to cover the expenses of:
 - professionals coming to Springboard from a distance,
 - guests visiting Springboard in an official capacity
 - hosting conferences and interagency functions

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- facilitating interactions with, or rewarding volunteers, donors and business partners.
- c) Hospitality expenditures are to be kept modest and consistent with the status of the guest(s), the number of persons attending, and the business purpose to be achieved.
- d) Hospitality may include a meal or a reception in a responsible manner and only under the discretion and approval of the CEO.
- e) All expenses must be documented and reflect the purpose of hospitality, the form of hospitality, the cost, name and location of the establishment, number of attendees, names of the individuals entertained and their titles/company name, and the name of the member of Springboard management approving the expenditure.
- f) The following functions will not be reimbursed:
 - *Office social events*
 - *Retirement parties*
 - *Holiday lunches*

8.2 Expenses for Consultants and Other Contractors

Consultants and other contractors will not be reimbursed for any hospitality, incidental and food expenses, including:

- *Meals, snacks and beverages*
- *Gratuities*
- *Laundry and dry cleaning*
- *Valet services*
- *Dependent care*
- *Home management*
- *Personal telephone calls*

9 ATTACHMENTS

FPM 2.04 Personal Expense Reports Map FPF 2.05
A Travel Expense Report Form