



The Terry Fox Research Institute
L'Institut de recherche Terry Fox

TRAVEL EXPENSES

This policy covers reasonable reimbursable expenses for individuals invited to attend TFRI meetings, conferences, workshops and renewals at TFRI's expense. Expenses are not reimbursable for specific travel, accommodation and/or refreshments which are paid for directly by TFRI or its grantee. TFRI reserves the right not to reimburse expenses that fall outside of this policy.

This policy is best achieved when the activities are carried out in the most economical and effective manner and are likely to satisfy the public's perception of what is an acceptable expenditure for a charitable organization.

Meals

Meals are eligible for reimbursement by submitting receipts for the actual cost of the meal and when the meal is not already included in conference or meeting fees and agendas. Please refer to the Receipt section of this Policy to review what receipts must be submitted. The maximum daily limit allowable for reimbursement in Canada is \$60.00 including taxes and gratuities. Individually, the maximum per meal is:

Breakfast: \$14.00

Lunch: \$16.00

Dinner: \$30.00

Hotels

Hotel accommodations are to be selected on the basis of location, convenience and cost. Meeting participants whose accommodation requirements exceed those provided by TFRI, (*for example, room upgrades which involve an increase in the nightly rate*) will be responsible for the extra cost and will be reimbursed *only* for the cost of the hotel accommodations made available to TFRI.

Transportation

Air Travel

Air travel must be planned as far in advance of the meeting date(s) as possible so as to obtain the lowest fares. TFRI will reimburse meeting participants at the lowest fare available for the flight (*for example, Air Canada's Flex*), with any cost differential in airfare resulting from an upgrade being paid for by the participant.

Car Rental

Every effort must be made to minimize the cost of rental cars by using non-luxury vehicles that are suited to the number of passengers. Reimbursement will be made for the car rental fee, the kilometer/mileage charge by the car rental agency, cost of gas and insurance coverage (*if applicable*). Damages to the rental vehicle will be the sole responsibility of the person who rented the vehicle.

Private Automobile

Travel by your personal vehicle may be required to save time and/or costs to TFRI. The reimbursement rate for the use of an individual's personal automobile is intended to cover all operating costs except parking. The kilometer/mileage incurred while using a private automobile is applied to the actual driving distance, using the most direct route, and will be reimbursed at a rate of \$0.49 per kilometer/mile.

Airport Transportation

Airport buses and hotel shuttle services must be used rather than taxis or limousines whenever possible.

Loyalty Program Points

Travellers may retain for personal use any loyalty program points (*for example, frequent flyer points or hotel loyalty program points*) accumulated from TFRI travel. Meeting participants are not expected to use points from loyalty programs for TFRI travel. However, should they choose to do so, the participant shall not claim reimbursement for the equivalent cost of the airline ticket. TFRI will reimburse the cost of taxes and surcharges actually paid by the participant based on receipts submitted.

Travel Insurance

Travellers must ensure that they have adequate insurance coverage for the planned travel.

Combining TFRI Travel with Personal Travel

Travellers may combine TFRI travel and personal travel with prior approval of the Chief Operating Officer. Prior to the participant scheduling indirect routes (*interrupting the business portion of the trip for personal travel or vice versa*), the traveller must contact TFRI to agree on a fair allocation of expenses for the trip. In no event will the Institute's portion of expenses exceed what would have been charged had the personal travel interruption not occurred.

Conference Registration

A registration receipt (*or confirmation of registration*) indicating the delegate name, amount paid, location and date of the conference must be submitted if reimbursement is requested.

Receipts

Original, itemized, and dated receipts are required to support the expense claim. Cancelled cheques and "paid" notices are not acceptable.

Meals and Incidentals

Credit card vouchers for gasoline and meals may be submitted. Meal receipts must include both the itemized bill (*showing the food and beverage items, prices, date and time of the meal, names of the guests*) and the final customer copy (*showing the gratuity and final bill amount*).

Airline Tickets

Paper or electronic tickets are acceptable for reimbursement. A copy of the travel agent's invoice or online booking invoice must be submitted for reimbursement. The ticket must indicate the passenger's name, ticket number, breakdown of the various costs, including applicable taxes, and the form of payment used to pay for the ticket.

Expense Claim Forms

Expense reports must be completed by the participants accurately and fully, using the Expense Report template provided by TFRI. Travel claims must be submitted within thirty (30) working days of the traveller's return. Each expense claim must have:

- A clear statement of the purpose and the duration of the trip or the name of the meeting attended.
- Clearly detailed expenses supported by the dated receipts.
- The original signature of the traveller certifying that all information is correct.

Expense reports and all required original receipts must be reviewed and approved by the Chief Operating Officer, TFRI, before being forwarded to the National Office for processing.

In order to reduce administration costs, participants are requested not to submit expense reports for less than \$25 unless there are special circumstances approved in advance by the Chief Operating Officer.

Minor Expenses Where Receipts Are NOT Provided

- The use of parking meters.
- Transit fares where no ticket or receipt showing the fare paid is available.
- Gratuities (*please indicate where, when, and how much for each gratuity*).

Other Reimbursable Travel Expenses

- Parking is reimbursable; however every effort should be made to minimize costs when travelling in large urban areas.
- Reasonable expenses for taxis and public transportation to and from meetings and appointments.
- Voice and data communication charges including in-room internet charges.
- Baggage handling and storage by the hotel when you are not able to take your luggage with you to your meeting or appointment or when there is a significant delay in your departure.
- Charges levied by the airlines to check one (1) piece of personal luggage.

Expenses That Are NOT Reimbursable

- Alcoholic beverages.
- Meals when they are included or pre-arranged in your meeting or conference package.
- Additional costs for pets or children in the hotel room.
- Currency exchange rate charges or fees.
- Mileage claims using your personal vehicle for round trips of less than 10 km.
- Fees levied by airlines to change or cancel an existing airline reservation unless approved in advance by the Chief Operating Officer, TFRI.
- Laundry and valet expenses.
- Hotel athletic or spa facility charges.
- In-room beverage service (mini bars) and in-room movies.
- Upgrades to hotel accommodation where there is an increase in the nightly rate.
- Traffic violations and parking tickets.
- Personal expenses such as kennel fees, overnight dependent care expenses, travel, accident and life insurance costs.
- Interest charges on outstanding credit card statements.
- Loss or damage to personal possessions.
- Expenses for failure to cancel transportation or hotel reservations.
- Excess personal baggage charged by the transportation carrier in excess of one bag.
- Passport application fee or renewal fee.