



Policy History
Policy No. FM5
Approving Jurisdiction: President
Administrative Responsibility: Chief Financial Officer
Effective Date: July 21, 2020

Business and Travel Expense Policy

A. CONTEXT AND PURPOSE

1. The purpose of this policy and its related procedures is to establish a framework and guidelines for the purchase and reimbursement of approved business and travel expenses incurred on behalf of the University while on authorized University business. The policy and procedures will:
 - a. define approved reasonable business and travel expenses and establish responsibility for the approval of business and travel expense reimbursements.

B. SCOPE AND LIMITS

1. This policy covers the purchase and reimbursement of reasonable business and travel expenses incurred while on authorized University business. This policy pertains to all employees of the University, and to individuals associated with and/or working on behalf of the University.
2. In the event of a discrepancy between this policy and KPU’s Collective Agreement with either the KFA or the BCGEU, the Collective Agreement shall prevail.

C. STATEMENT OF POLICY PRINCIPLES

1. General

- a. Kwantlen Polytechnic University (KPU) will accept and reimburse approved travel and business related expenses that are reasonable, properly reported, and comply with the related procedures. If purchased or claimed expenses exceed reasonable costs, only the reasonable portion will be accepted or reimbursed.
- b. Preapproval is required for the following:
 - i. business travel outside of the [Metro Vancouver Regional District](#) that requires overnight accommodation; and
 - ii. *hospitality* expenses.
- c. Departments or Faculties may have additional restrictions on travel and business expenses which will be communicated from and monitored by the respective departments or faculties.

- d. Corporate programs, on-campus vendors, or University-wide Agreements shall be given first right of refusal, and established processes should be followed in accordance with any existing agreement.
- e. This policy and related procedures applies to all sources of funding, unless it directly conflicts with an external sponsor (i.e. external granting agencies that may have their own Business and Travel Expense policy).
- f. Any request for exception to this policy must be provided to the Vice President, Finance and Administration or designate, the Board Chair for expenses claimed by the President. Reimbursement outside the scope of this policy is determined at the discretion of the Vice President, Finance and Administration, or the Board Chair for expenses related to the President, subject to the rationale provided for the exception.

2. Travel

- a. Eligible expenses are listed in Appendix A, Table A1 of the related-procedures.
- b. Allowable meal / per diem expenses while on Travel Status are listed in Appendix A, Table A3 of the related procedures.
- c. Employees should consider alternatives to travel whenever possible to avoid incurring any unnecessary travel expenses.
- d. In planning for international travel, consideration is given to the travel advice and advisories provided by the Government of Canada and KPU policy SR10 *International Travel and Security*.
- e. In arranging business travel, departments and employees will consider the potential risks associated with travel plans to the same destination involving multiple employees.
 - i. Established travel restrictions are required to mitigate operational risk. Each senior executive is required to minimize its exposure to loss by limiting the number of key personnel who travel together by any mode of transportation.
 - ii. The following key personnel are prohibited from traveling together unless deemed an emergency. Any exceptions must be granted by the President.
 - The President and Vice Presidents
 - Vice Presidents
 - Vice Presidents and their direct reports
- e. Flexible Travel Arrangements are permitted as long as no additional expenses are incurred by KPU.
- f. Transportation should use the most direct and economical method, with consideration of effective use of time.

3. Business Expenses

- a. Eligible business expenses are listed in Appendix A, Table A1 of the related procedures.
- b. Appendix A, Table A2 of the related procedures outlines eligible mileage expenses as well as additional parameters of claiming mileage for reimbursement. Standard distances between KPU campuses are provided in Appendix B, Table B1 of the related procedures.

- c. Preapproval is required for hosting external clients at University functions held off-campus and must be obtained by the area Vice President and sanctioned at the discretion of the administrator or designate responsible for the department/division.
- d. University gifts for employees, students, speakers and guests are reimbursable for retirements, special achievements and similar purposes up to the maximum provided in Appendix A, Table A4 of the related procedures.
 - i. Entertainment and gifts are ineligible on externally sponsored grants and contracts unless written sponsor approval has been provided.
 - ii. Gifts of alcohol or gift cards of a direct supplier of alcohol are not reimbursable.
- e. Any funds administered by the University cannot be used for the purpose of making a donation to another organization. The only exceptions are the President, Provost, Vice Presidents, Directors and Deans who are required to attend public fundraising events by virtue of the position they hold. If made, these donations are not considered to be sponsorship by KPU and must have pre-approval of the Vice-President, External Affairs.
- f. The Employee Engagement Fund provides each Department/Division with preapproved \$50 per person per fiscal year to be used at the discretion of the Department/Division for activities which enhance employee engagement. Departments/Divisions are responsible for ensuring that the coordination of their activity has minimal impact on the University's operational services.
- g. Honoraria payments are reimbursable and considered token payments for services. In addition, honoraria must adhere to the following criteria:
 - i. the work does not contravene the contracting out provisions of a collective agreement;
 - ii. the work is generally infrequent or one-time in nature; and
 - iii. the work does not exceed the maximum outlined in Appendix A, Table A4 of the related procedures.

4. Responsibilities

- a. Employee responsibilities:
 - i. To obtain one-over-one pre-approval for any travel outside of the Metro Vancouver Regional District.
 - ii. The signature of an employee's direct supervisor and signing authority officer, who may be the same individual, is required to certify that travel expense claims are correct, complete and comply with the Policy and/or funding agencies expense and approval requirements.
 - iii. Submission of original, itemized receipts and associated pre-approval forms is required for expense reimbursement, unless otherwise stipulated in the Policy or Procedure (i.e. meal / per diem while on travel status).
 - iv. To obtain appropriate insurance relating to health, rental vehicle, and equipment, including suitable personal vehicle insurance if a personal vehicle is used for business purposes.
 - v. Employees are expected to demonstrate fiscal responsibility for the use of any University resources or facilities.

- b. Signing Authority officers are responsible for:
 - i. approving requests before expenses are incurred; and
 - ii. determining and/or ensuring that the expense is a reasonable, appropriate and supported business or travel expense.
- c. Financial Services is responsible for the administration of this policy and the related procedures. The Executive Director, Financial Services will provide interpretation of and/or clarification on items not specifically addressed in this policy and/or the related procedures.

D. DEFINITIONS

Refer to the related Procedures document for definitions which will enhance the reader's interpretation of this Policy.

E. RELATED POLICIES & LEGISLATION

AD3 Purchasing Policy

ER9 Political Fundraising Expenses

GV4 Signing Authority Policy

HR6 Service Recognition

SR10 International Travel and Security

F. RELATED PROCEDURES

Refer to Procedure FM5 *Business and Travel Expense*.