

STANDING BYLAWS
COMMITTEE

UNDE



Travel Policy

April 2018

UEDN

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SECTION 1 – INTRODUCTION

Mandated during the 2017 Triennial Convention that was held in Victoria, BC the members in attendance concurred that a UNDE Travel Policy be created by the Bylaws Standing Committee and that a continuous review process also be put in place – resolution #67.

“WHEREAS while members are travelling for union business under UNDE there is often confusion about the travel policy;

WHEREAS UNDE does not have its own travel policy:

BE IT RESOLVED that the Standing Bylaws Committee write a UNDE Travel Policy;

BE IT FURTHER RESOLVED that the mandate of the Standing Bylaws Committee be updated to ensure a system of review of the Travel Policy is set in place.”

1.1 Policy statement

It is the aim of the UNDE Travel Policy to ensure consistency and fair treatment of all individuals who are required to travel on authorized UNDE business.

Unionized facilities, suppliers and services must be used whenever available and possible.

The provisions contained in this policy are mandatory. These provisions provide for the reimbursement of reasonable expenses incurred while travelling on UNDE business.

The UNDE National President has the discretion to consider unique circumstances when applying this policy.

1.2 Definitions

Approval - means the person authorizing the travel expense claim.

Business travel – means all travel authorized by the UNDE, and is used in reference to the circumstances under which the expenses prescribed in this policy may be paid or reimbursed from UNDE funds.

Commercial accommodation – means hotel or motel type of accommodation or a similar commercial establishment that provides lodging at an established rate.

Continuous travel –Period of uninterrupted travel between the traveller’s initial point of departure and the final destination.

Economy – means the standard class of air travel, including special discount fares. It excludes first class and business/executive class or equivalents.

Exceptions - means unusual circumstances or special needs that have not been covered in this policy. The UNDE National President has the authority to approve exceptions and make individual decisions that are not covered in this policy.

Incidental expenses– includes such items as gratuities, internet, laundry, dry cleaning, bottled water, phone calls home, grass cutting, snow removal, home security check, plant watering, mail services, pet care, telecommunications hook- ups and service, shipping of some personal effects, and other personal supplies and services, the costs of which can be attributed to a period in travel status, but for which no other reimbursement or allowance is provided under this policy.

Kilometric allowance - means the rate as indicated in Appendix B based on highest provincial rate (exception for the Territories) payable for all authorized travel by motor vehicle.

Maximum Allowed for Driving - means the amount paid to a traveller when he/she chooses to travel by privately owned motor vehicle for distances over 300 kms one way, when commercial air or rail transportation is available. The amount paid will be the kilometric distance at the applicable rate specified in Appendix B plus parking, up to the maximum of \$700 (round trip).

Meal allowance - means the rates for breakfast, lunch, or dinner as indicated on Appendix C.

Non-commercial accommodation and private non-commercial accommodation – means a private dwelling owned or rented by an acquaintance or relative with whom the traveller does not normally reside, campsites, or other accommodation where incidental expenses are minimal.

POMV - means Privately Owned Motor Vehicle.

UNDE – means the Union of National Defence Employees

Receipt – means an original document or carbon copy or certified true copy showing the amount of expenditure, itemized where possible, the date and indicating proof of payment – for outside sourced auditing requirements.

Reasonable expenses – means the specific, itemized expenses incurred, based on receipts, excluding alcoholic beverages, up to the amount determined by the UNDE to be justifiable under the circumstances.

Travel Loyalty Program - Frequent Flyer points - means benefits offered by the travel industry for business or personal use.

Traveller – is used in this policy to designate both UNDE employees and members who travel on authorized UNDE business.

WE Travel Service - is currently the unionized travel agent company that is utilized by UNDE.

SECTION 2 – ADMINISTRATION

2.1 Authorization

2.1.1 It is UNDE's responsibility to determine, when, where, by whom and by what means of travel will be undertaken and to select the mode and class of transportation and the accommodation to be used, subject to the provisions of this policy. All travel must be pre-authorized.

2.1.2 Personal travel can be booked through the UNDE Travel Agency but must be charged to a personal credit card.

2.1.3 Individuals travelling on UNDE business are entitled to transportation and accommodation that is comfortable and of good quality. Allowance, rates, reimbursements and conditions of payment shall be sufficient to meet reasonable, legitimate expenses that are necessarily incurred as a result of the requirement to travel.

2.1.4 Should a change in itinerary on route occur or if emergency travel is required, where pre-authorization is not possible, change will be in accordance with the UNDE Travel Policy.

2.1.5 An explanatory note concerning items not pre-authorized or changes to pre-authorized items should be included with the expense claim or a notation made on the claim.

2.2 Responsibilities

2.2.1 The UNDE:

- determines whether travel is necessary;
- ensures that this policy is available to all UNDE travellers;
- ensures that the selection and reservation of appropriate arrangements (transportation, accommodation, advances, etc.) are consistent with the provisions of this policy.
- pre-authorizes travel; and
- verifies and approves travel expense claims.

2.2.2 The traveller is responsible for:

- being familiar with the UNDE Travel Policy;
- obtaining authorization prior to travel;
- submitting fully completed travel expense claims with necessary supporting documentation, original receipts and explanations of changes as required;
- submitting travel expense claims within the month after completion of the travel.
- the safeguarding of travel advances and funds provided.

2.3 UNDE travel agent

2.3.1 Travel agent contact information:

Voyages W.E. Travel 25-A York Street, Ottawa,
Ontario K1N 5S7

Tel.: 613-232-9908 or Toll free: 888-676-7747 (Ottawa) Fax :
613-232-9931

E-mail : Lorna@wetravel.net web page:
www.wetravel.net Reservation Office Hours:
Monday through Friday - 8:30 a.m. - 5:00 p.m. EST

24 HOUR EMERGENCY TRAVEL CENTRE
1-800-787-6030

2.3.2 *A client profile form is necessary for each frequent traveller in order to save time when making their bookings. Individuals who occasionally travel on authorized UNDE business do not need a profile. If a travel profile is not completed, the Travel Agent will request the information directly from the traveller, for example, seating preferences, special service requests, frequent travel program information, etc.*

2.4 Travel problems and complaints

2.4.1 All problems and complaints should be fully documented in writing and sent by email to the Vice-President of your region.

2.5 Travel advances

2.5.1 Traveller's on UNDE business shall, upon request be provided with a travel advance to cover travel expenses not paid directly by the UNDE. This request should be done at least 3 weeks prior to the activity.

2.6 Gifts, hospitality and other benefits

2.6.1 When travelling to a UNDE function, the traveller is not permitted to choose to give up their seat. The traveller is expected to be on-time for the UNDE function other than unexpected delays.

2.6.2 Coupons, vouchers or other benefits such as accommodation, which are received due to delays, can be used by the traveller. Claims should not be made for any such benefits that have been provided free of charge to the traveller. The appropriate explanations should be written on the expense claim or an accompanying document.

2.6.3 While on UNDE official business travel, travellers can collect and redeem benefits from Travel Loyalty Program(s) (TLP) also known as Frequent Flyer Points. These benefits are for personal use and cannot be redeemed for cash value towards UNDE business travel.

2.7 Receipts

2.7.1 For claims submitted in hard copy form, original receipts must accompany the claim to be processed. For claims submitted electronically, a copy of the original receipt (scanned, faxed or a picture) must accompany the claim to be processed, retain all receipts until claim has been reimbursed.

2.7.2 If a traveller is claiming return taxi, toll or ferry fares, he/she should submit a receipt for the return portion. However, one receipt is sufficient proof of payment, if the traveller attaches a receipt to his/her claim and indicates on the expense claim form that the amount being claimed is the fare times two (e.g. \$25 x 2 = \$50). Should the receipt for the return fare be more than the amount reimbursed an additional claim may be submitted for the additional amount of the return fare.

2.7.3 The only expenses for which receipts are not required are as follows:

- meal allowances (unless otherwise specified);
- incidental expense allowances;
- kilometric allowance;
- private lodging

2.8 Overpayments

2.8.1 The UNDE is require to recover all overpayments made to traveller.

2.9 Rest Periods

2.9.1 To alleviate fatigue caused by time-zone changes or overnight travel, a suitable rest period of up to 10 hours may be allowed between the time the traveller arrives at the destination (home, hotel, event site) and the time the traveller is required to report for work.

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SECTION 3 – INSURANCE

3.1 Car rental insurance

3.1.1 It is the traveller's responsibility to ensure that full insurance coverage is included for the entire period that a car is rented for the UNDE business.

3.2 Privately Owned Motor Vehicles Insurance

3.2.1 Travellers are responsible for ensuring sufficient insurance coverage at all times for their privately-owned motor vehicles when used for UNDE travel.

Privately owned vehicles travel shall have at least the minimum provincial/territorial/state/country insurance coverage of liability and physical damage.

3.2.2 The UNDE is not responsible for reimbursing deductible amounts related to insurance coverage. The UNDE assumes no financial responsibility for privately owned motor vehicles other than paying the authorized kilometric rate or the maximum allowed for driving rate (depending on the authorization).

3.2.3 Travellers should ensure that their insurance covers any other UNDE travellers in the car.

SECTION 4 – TRANSPORTATION

4.1 Commercial transportation

4.1.1 The selection of the mode and class of commercial transportation is made by the UNDE on the basis of cost, convenience, duration, safety and practicality. The UNDE may authorize alternate arrangements for specific events (example: Convention, Conferences, etc.) for these reasons.

4.1.2 Commercial air transportation is the normal method of travel for distances in excess of 300 km (one way) for the reasons cited in Section 4.1.1. When travel by commercial air carrier or by train presents significant inconvenience, or is not deemed practical by the UNDE, in terms of overall costs, the use of a privately owned motor vehicle (POMV) may be authorized. (See Section 4.6. for guidelines on use of POMV)

4.1.3 Trips of less than 300 kilometers (one way) are not normally authorized via

commercial air transportation. Instead commercial ground transportation (i.e.: train) should be considered where it is available, convenient and more economical.

4.1.4 All commercial air and train transportation, are to be booked using the travel agency chosen by the UNDE and charged to the UNDE Corporate Credit Card unless otherwise authorized.

4.1.5 When commercial transportation by air or train is authorized, the UNDE Travel Agent will provide the traveller with the necessary prepaid electronic tickets.

4.1.6 When commercial transportation other than by air or train is authorized and used, the traveller shall be reimbursed actual and reasonable transportation costs based on receipts. Pre-approval is required.

4.1.7 Any penalty costs incurred as a result of changes or cancellations made by the traveller for personal reasons after tickets have been issued will be paid by the traveller, except in cases where penalty costs are the result of unusual circumstances or emergency situations beyond the control of the traveller. Such changes and exceptions require the authorization of the National President.

4.2 Commercial air travel

4.2.1 All reservations for commercial air travel must be booked through the UNDE Travel Agent and charged to the UNDE Corporate Credit Card. Air transportation should be used for distances in excess of 300 km (one way).

4.2.2 If access to the UNDE Travel Agent is unavailable or, where it is not possible to use the services of the UNDE Travel Agent, a traveller will be reimbursed the actual and reasonable commercial air transportation costs based on receipts. In these circumstances tickets should be purchased directly from the carrier rather than through a travel agent. Pre-approval is required and must be obtained for such travel.

4.2.3 The standard for air travel includes advanced seating assignment and the reimbursement of one (1) baggage fee for each direction of travel (if not already included in cost of ticket) on unionized carriers. Preferred seating costs are not covered by UNDE.

4.2.4 Reimbursement of transportation costs for airfare and accommodation to an alternate location for personal reasons will not be reimbursed. However, it will typically be considered if it is more effective and pre-authorized.

4.3 Train

4.3.1 All rail travel is to be booked using the travel agency chosen by UNDE and charged to the UNDE Corporate Credit Card.

4.3.2 If access to the UNDE Travel Agent is unavailable or, where it is not possible to use the services of the UNDE Travel Agent, a traveller will be reimbursed the actual and reasonable rail transportation costs based on receipts. In these circumstances tickets should be purchased directly from the carrier rather than through a travel agent. Pre-approval is required and must be obtained for such travel.

4.3.3 When rail travel is authorized it should normally be by business class.

4.4 Taxi

4.4.1 Unionized taxi services may be used when other more economical alternatives such as local transit or airport shuttle service are unavailable or impractical.

4.4.2 All claims for taxi fare requires a receipt.

4.5 Car rentals

4.5.1 Rental vehicles may be pre-authorized where this mode of travel is economical and practical. Rentals should be reviewed by VP of the Region and pre-authorized by the National President.

4.5.2 Travellers should use the UNDE Travel Agent for reservations and rentals. The UNDE Travel Agent reserves cars with unionized companies whenever possible and at preferred rates. Only UNDE authorized traveller(s) should be registered as the driver(s) on the car rental agreement.

4.5.3 An intermediate vehicle is the usual standard. Higher vehicle categories may be pre-authorized where the bulk or weight of the goods to be transported, or an extenuating circumstance warrants the authorization of a higher vehicle category (such as unsafe road conditions or if two or more passengers have been authorized to travel together).

4.5.4 In an emergency, where the Travel Agent cannot book car rentals, travellers should deal directly with unionized car rental companies wherever possible.

4.5.5 If the rental charges are higher than those obtained by the UNDE Travel Agent an explanation should be provided on the travel claim. Drop-off charges will be authorized where it is cost beneficial and should be pre-authorized.

4.5.6 The traveller is required to provide a credit card for all car rental reservations and at the time of pickup at the car rental location. The rental company will not rent a vehicle unless the driver has a valid credit card.

4.5.7 Insurance - See Section 3.1, Car Rental insurance.

4.5.8 Gasoline expenses will be reimbursed by the UNDE with receipts. Travellers are required to use the most direct routes and claim for distances driven while on UNDE business travel (from the authorized point of departure to the destination and return and any other distances driven on UNDE business at the destination). Where possible, upon return of the vehicle to the agency, ensure that the vehicle is fully fueled.

4.6 Carpooling

4.6.1 Carpooling shall be used when travelling by vehicle when there is more than one member from the same geographical area travelling to the same event.

All carpooling scenarios shall be reviewed by the Vice-President of the Region and pre-authorized by the National President.

4.7 Privately Owned Motor Vehicle (POMV)

4.7.1 When a traveller is pre-authorized to proceed on UNDE business, travel between home and a carrier's terminal, taking into consideration the necessary luggage involved, shall be by the most economical and practical means. Use of POMV shall be reimbursed at the UNDE kilometric rate (see Appendix B) for the portions driven by the

traveller, plus parking charges where it is cost effective to leave a POMV at the public carrier's terminal during the period of absence.

4.7.2 Travellers who are beginning or ending a period in travel status and are authorized to drive a POMV to and from the carrier's terminal, such as an airport, shall be reimbursed the kilometric rate specified up to the distance between their home and the carrier's terminal.

4.7.3 Travellers may use their POMV for trips where the distance does not exceed 300 kilometres one way. The UNDE may authorize alternate arrangements for specific events (such as Convention and Conferences, etc.), where commercial transportation such as train would be the approved mode of transportation and use of POMV would be up to the most economical train fare. (See Section 4.1.1)

4.7.4 When commercial transportation is not available or practical, a POMV, may be authorized where this method is practical and economical. Payments in excess of those normally incurred such as road, ferry, bridge, tunnel tolls and parking charges shall be reimbursed based upon receipts. When a POMV is the approved method of travel, claims for taxi fares are not authorized. A traveller may request to travel by POMV to suit his or her own convenience; if pre-authorized the cost should not exceed the Maximum Allowed for Driving rate found in Section 4.8.

4.7.5 In the interest of safe driving, travellers should not normally be expected to drive more than:

- 250 kilometres after having worked a full day;
- 350 kilometres after having worked one-half day; or
- 500 kilometres on any day when the traveller has not worked.

These guidelines apply only under the following circumstances:

- 1) If commercial transportation is not available.
- 2) If the use of a POMV has been deemed to be the most practical method of transportation by the UNDE.
- 3) If the UNDE requests that a traveller uses a POMV.

For travellers who choose to use their POMV to suit their own convenience, guidelines

found under Section 4.8 (Maximum Allowed for Driving) shall apply.

4.7.6 The UNDE determines the kilometric allowance rates for UNDE travellers. The kilometric allowance rates are subject to UNDE review and authorization. UNDE kilometric rates can be found in Appendix B.

4.7.7 Travellers are required to use the most direct routes and claim for distances driven while on UNDE business travel (from the authorized point of departure to the destination and return and any other distances driven on UNDE business at the destination).

4.7.8 Insurance - See Section 3.2, Privately Owned Motor Vehicles-Insurance

4.8 Maximum Allowed for Driving

4.8.1 A traveller who chooses to use their POMV to suit their own convenience for distances of more than 300 km, one way, will be reimbursed for kilometric distance at the applicable rate plus parking, up to a maximum of \$700 (round trip).

4.8.2 The traveller authorized to travel by vehicle shall be entitled to claim expenses, salary entitlement and meals in accordance with rates specified in Appendix A for the period of the absence that would have been necessary had commercial transportation been used.

4.9 Parking

4.9.1 Parking costs will be reimbursed upon presentation of an original receipt, where the use of a vehicle has been approved. Valet parking charges are not reimbursed unless the hotel or venue prohibits guests from parking their own vehicles.

4.10 Traveller as a passenger in a privately-owned motor vehicle (POMV)

4.10.1 Travellers may arrange to have another person drive them to, or pick them up from a public carrier's terminal. In either case, the amount claimable must be based on the most direct road route and each round-trip cost claimed cannot exceed the one-way taxi fare to and from the carrier's terminal. Kilometric rates can be found in Appendix B.

4.10.2 When a traveller is authorized to travel as a passenger in a POMV to his or her destination, where the driver is also an authorized traveller who is eligible to claim a kilometric allowance (see Appendix B) or the Maximum Allowed for Driving (Section 4.8), only one individual is entitled to claim reimbursement for use of the POMV.

4.10.3 Insurance - See Section 3.2, Privately Owned Motor Vehicle - Insurance.

SECTION 5 – TRAVELLERS WITH DISABILITIES

Where a traveller with a disability incurs additional expenses related to the accommodation of that disability, the UNDE will reimburse these expenses provided they are reasonable and pre-authorized. Receipts are required.

SECTION 6 – ACCOMMODATION

6.1 Reimbursement and standards.

6.1.1 It is the responsibility of the UNDE to select accommodation for travellers. The traveller shall be reimbursed for actual and reasonable expenses for commercial accommodation where available. Receipts are required for payments in commercial accommodation.

6.1.2 All hotel accommodations are to be booked by UNDE using the UNDE Travel Agency. The traveller is then responsible for the payment of hotel expenses using their personal credit card. If the traveller does not have a personal credit card, the traveller should contact the UNDE staff responsible. The traveller is responsible for any personal or incidental expenses that may have been charged to their room.

6.1.3 When hotel accommodations are blocked booked, UNDE is responsible for payment of the room, the traveller is responsible for any personal or incidental expenses that may have been charged to their room. If the traveller does not have a personal credit card, the traveller should contact the UNDE staff responsible.

6.1.4 When the traveller chooses alternate commercial accommodation from that designated by the UNDE, the hotel should be unionized. The UNDE will pay the alternate hotel cost up to the maximum of the cost of authorized accommodation.

6.1.5 Travellers attending an activity on the UNDE's behalf, where the host venue is not

unionized, may be authorized to reserve accommodation at this venue, provided that alternate, reasonable, practical and unionized accommodation is not available.

6.2 Cancellations, guaranteed reservations and hotel overcharges

6.2.1 When travel plans change and the accommodation will not be required; the traveller shall ensure that reservations are cancelled through the UNDE Travel Agent or directly with the commercial establishment(s).

6.2.2 It is the responsibility of the traveller to cancel reservations to avoid “no-show” charges. When circumstances beyond the traveller’s control prevent the traveller from cancelling the reservation, the “no-show” charges may be reimbursed by UNDE.

6.2.3 It is the traveller's responsibility to question the commercial establishment when the rate charged is in excess of the negotiated rates or as quoted by the UNDE Travel Agent.

6.3 Private non-commercial accommodation

6.3.1 Although travellers generally stay in commercial accommodation, the UNDE will authorize a traveller to make arrangements for private, non-commercial accommodation. A traveller who makes such arrangements shall be reimbursed an amount in accordance with the UNDE Travel Policy (see Appendix C)

SECTION 7 – MEALS, INCIDENTALS AND OTHER EXPENSES

The UNDE sets the meal allowance rates which are subject to UNDE review and authorization. UNDE meal allowance rates can be found in Appendix C.

7.1 General

7.1.1 Breakfast can be claimed if traveller leaves home before 8 a.m. Dinner can be claimed if traveller arrives home after 5 p.m.

7.1.2 For each day or part day in travel status where overnight accommodation is authorized, a traveller shall be paid a meal allowance for each breakfast, lunch and dinner when applicable. If the meal was provided free of cost to the traveller the meal

allowance cannot be claimed (i.e.: UNDE lunch meeting, hotel full breakfast). Receipts not required.

7.1.3 For each day that the traveller is out of the office on UNDE business, the appropriate meal allowances will be paid. Receipts are not required.

7.2 Meals provided

7.2.1 Travellers with food allergies or dietary restrictions shall clearly communicate their requirements when registering for the event in order to ensure that they may be accommodated.

7.3 Incidentals

7.3.1 The UNDE determines the incidental expense allowance rate which are subject to UNDE review and authorization. The UNDE meal allowance rates can be found in Appendix C.

7.3.2 When overnight accommodation is authorized and used, a traveller shall be paid an incidental expense allowance that covers a number of miscellaneous expenses, including the cost of gratuities, for each day or part day in travel status.

7.4 Per Diem (flat rate)

7.4.1 A reasonable per diem flat rate may be paid in lieu of meal and incidental expense allowances. The amount of per diem are authorized by the UNDE.

7.5 Excess luggage & other related expenses

7.5.1 A traveller shall be reimbursed costs incurred in transporting UNDE-owned equipment or materials at excess luggage rates, if the UNDE determines that it is necessary for the equipment or materials are to be taken on the trip. Receipts are required.

7.5.2 Excess luggage rates for personal items will not be reimbursed.

7.5.3 A traveller who is in travel status for 10 nights or more may be reimbursed the excess luggage rates. Receipts are required.

SECTION 8 – References

8.1 National Joint Council (NJC)

Appendix B: Kilometric Rates: <https://www.njc-nm.gc.ca/directive/d10/v238/s658/en>

Appendix C: Meal Rate/Lodgings: <https://www.njc-cnm.gc.ca/directive/d10/v238/s659/en>

