

Travel and Hospitality Policy

Policy ID	FAR-POL001	Revision No	1
Responsible Committee	FARM	Approver	Board
Effective Date	10 June 2025	Approval Date	9 June 2025
Scope	Directors, Officers, members of Board committees and other advisory bodies, staff, and others providing goods or services to MEOPAR, including consultants and contractors, and grantees.		
Policy notes	Related document: Plan – Travel & Hospitality		
Review Cycle	Annual	Next Review Date	9 May 2026

1. Purpose

This policy provides a comprehensive framework for managing travel and hospitality expenses incurred while conducting authorized MEOPAR business. It ensures that all expenditures are reasonable, necessary, and in alignment with the [National Joint Council \(NJC\) Travel Directive](#) and the [Treasury Board \(TB\) Directive on Travel, Hospitality, Conference, and Event Expenditures](#).

2. Scope

This policy applies to all MEOPAR employees, including full-time, part-time, and contract staff, as well as board members and volunteers engaged in official MEOPAR business. It also extends to consultants and external parties when specified in contractual agreements. However, the policy does not apply to travel that is funded and governed by external institutions or to personal travel, even if it coincides with MEOPAR-related events.

Travel for work purposes is distinguished from regular commuting and refers to authorized travel that takes an employee beyond their normal place of work. Commuting is defined as travel between an employee's residence and their designated workplace and is not eligible for reimbursement. To be considered business travel and qualify for expense claims, the employee must travel a minimum of 40 kilometers (one way) from their normal residence. Any travel



within this threshold will be considered routine commuting and not eligible for compensation under the travel policy.

3. Policy Statement and Guiding Principles

MEOPAR is committed to ensuring that all travel and hospitality expenditures are necessary, cost-effective, and support the organization's mission and operations. This policy provides a consistent framework for the planning, authorization, reimbursement, and oversight of travel and hospitality expenses incurred during official MEOPAR business. All expenditures must demonstrate prudent use of resources, align with the principles of accountability and transparency, and comply with applicable guidelines, including relevant Treasury Board directives and the National Joint Council Travel Directive.

Travel and hospitality should be undertaken only when necessary, and alternative methods such as virtual meetings should be considered first. When travel is required, employees, board members, and other authorized individuals are expected to exercise discretion and sound judgment, selecting options that are economical, efficient, and environmentally responsible. All claims must be properly documented and submitted in accordance with established procedures.

3.1. Guiding Principles

MEOPAR adheres to the guiding principles set out by the NJC, which also reflect MEOPAR's internal values:

- **Trust:** Encouraging discretion and fairness in travel decisions.
- **Flexibility:** Accommodating personal and operational needs.
- **Respect:** Promoting dignity and support throughout the travel process.
- **Valuing People:** Ensuring health, safety, and family considerations.
- **Transparency:** Applying consistent and fair standards.
- **Modern Practices:** Using efficient and current travel tools and strategies.
- **Environmental Responsibility:** Encouraging the selection of sustainable travel options when feasible.

3.2. Conflict of Interest

All individuals approving travel and hospitality requests must disclose any potential conflicts of interest. Approvers are required to recuse themselves from the approval process if there is a



personal or professional conflict of interest, ensuring that funds are spent impartially and without undue influence.

4. Roles and Responsibilities

4.1. Employees and Travelers

- Request written or electronic pre-approval for all travel by submitting a request to your supervisor. Upon supervisor's approval, the MEOPAR Travel Budget Form will be completed and submitted to the Financial Controller.
- Ensure all travel arrangements and expenses are reasonable, necessary, and comply with this policy.
- Submit complete expense claims with electronic receipts and required documentation.
- Cancel travel reservations as early as possible to avoid unnecessary costs.
- Provide feedback as needed on the Travel and Hospitality Plan and approval process.

4.2. Supervisors and Approvers

- Provide input as requested into the annual travel and hospitality plan.
- Evaluate the purpose and necessity of each travel request in line with established criteria.
- Approve travel-related expenses in alignment with budgetary limits and the annual travel plan, in consultation with the Financial Controller as needed.
- Disclose any conflicts of interest in approving travel or hospitality requests.
- Verify that proposed travel complies with MEOPAR's policies and supports its operational goals.
- Identify any exceptions to the annual plan and follow the established process.

4.3. Finance and Administration

- Oversee and update the travel and hospitality policy to remain aligned with key directives.
- Provide tools, templates, and guidance to support compliant travel planning and expense reporting.
- Lead the annual travel and hospitality plan development.
- Approve travel and hospitality requests as outlined in the travel and hospitality plan.
- Review submitted claims for accuracy, completeness, and compliance, and process reimbursements in a timely manner.



- Work closely with supervisors and approvers to confirm the eligibility of expenses and provide clarification when necessary.
- Review expenditures quarterly and compare to the plan. Investigate identified variances and provide feedback and recommendations.

4.4. Executive Director

- Prepare and monitor the annual Travel and Hospitality Plan and budget.
- Review exceptions to the plan as outlined in the Travel and Hospitality plan.
- Provide final approval for international travel by ensuring it is required and necessary to implement official MEOPAR business, and to determine that a virtual option was unavailable or inappropriate given the circumstances, travel exceeding \$5,000, or any travel undertaken by direct reports.
- Review all quarterly reports and variance commentaries and approve changes to the policy or plan.

4.5. Board of Directors or a designated Board Committee

- Approve the annual Travel and Hospitality Plan and budget specific to the Executive Director.
- Regularly monitor the Travel and Hospitality expenditures of the Executive Director to ensure they are in line with the approved Travel and Hospitality Plan.

5. Travel Procedures and Eligible Expenses

5.1. Authorization and Planning

An annual travel plan is established each year through collaboration with project leads and departments. The plan sets out expected and intended travel and hospitality activities for the upcoming year and is approved by the Executive Director and tabled with the Board of Directors. The Executive Director travel will be identified in the annual plan.

Requests for travel and hospitality are reviewed for approval in the context of this plan. Any requests submitted that do not align with the plan are considered exceptions and submitted to the Executive Director for review.

Expenditures are reviewed quarterly against the plan, with investigation into variances. The plan is also reviewed and adjusted at mid-year, and a final end of year review is conducted to inform any changes to the policy and upcoming annual plan.



5.1.1 Travel

Travel should only be authorized when it is necessary, cost-effective, and supports MEOPAR's operational goals. When travel or activity is not approved, rationale will be provided.

Employees are expected to:

- Plan travel well in advance.
- Select travel options that balance cost, safety, accessibility, and efficiency.
- Consider virtual alternatives when appropriate.
- Align travel decisions with NJC principles of trust, flexibility, and transparency.

All MEOPAR travel must be pre-approved in writing using MEOPAR's Travel Budget Form. Appropriate approvers are outlined in the Travel and Hospitality Plan.

5.1.2 Hospitality

All hospitality expenses must be reasonable and directly related to MEOPAR business. Claims must include a clear business purpose, a list of attendees (including titles or organizations), and itemized receipts. Alcohol and drugs are not reimbursable.

Hospitality expenses must be pre-approved and budgeted to a specific project. Hospitality events where expenditures exceed \$500 must have a rationale briefing note on file with the Executive Director.

Team events organized by MEOPAR, including meals or team-building activities, require prior approval from the Executive Director. Each request will be reviewed individually, and the Executive Director will advise on the appropriate method of payment or reimbursement, such as using the organization's credit card or submitting a reimbursement claim.

5.2. Airfare

Air travel must be booked at the lowest logical economy fare that meets operational requirements. In accordance with the NJC Travel Directive, business class may be approved for continuous air travel exceeding nine hours, including stopovers of four hours or less. Such request would require approval by the Executive Director. MEOPAR will reimburse reasonable travel-related expenses associated with airfare, including checked baggage, seat selection, and in-flight internet usage, where required for business purposes. All airfare bookings should aim to minimize costs while supporting the safe and efficient completion of MEOPAR business.



5.3. Accommodation

Travelers must stay in safe, clean, and reasonably priced accommodations. The standard is moderately priced accommodations that meet operational and personal needs. Employees are not required to share accommodations. Reimbursement is based on actual costs and must be supported by itemized receipts. Reasonable charges for internet access required for work purposes are also reimbursable. Travelers are encouraged to book early and select accommodations that offer the best value while meeting safety and accessibility needs.

Travellers may also stay in private residences and be reimbursed at the NJC specified rates per night.

5.4. Meals and Incidentals

Meal and incidental expenses are reimbursed through daily per diems based on the rates set out by the NJC. Receipts are not required for per diem claims; however, receipts must be provided when expenses are incurred for meals during stakeholder meetings or engagement activities. Per diems will not be provided for MEOPAR-hosted events or meetings where meals are supplied, unless the provided meals do not meet documented dietary restrictions. The per diem also includes an incidental allowance meant to cover minor expenses such as tips, laundry, and bottled water, which cannot be claimed separately.

5.5. Local and Ground Transportation

5.5.1 *Public Transit*

Travelers are encouraged to use standard forms of local or regional transport such as taxis, rideshares (e.g., Uber or Lyft), or public transit (e.g., buses, trains, or subways) when it is practical, safe, and cost-effective. Receipts are required for all individual fares.

5.5.2 *Car Rentals*

Rental vehicles must be limited to intermediate-class unless a larger vehicle is necessary for operational reasons, such as transporting equipment or multiple passengers. Rentals may require Collision Damage Waiver (CDW) and third-party liability insurance (see below). These costs are reimbursable and must be itemized on the rental receipt.

Travelers must:

- Decline duplicate insurance coverage if already provided through a corporate card or insurance plan.
- Confirm and verify coverage details with MEOPAR management in advance.



MEOPAR is not liable for damages or costs incurred if appropriate coverage is declined.

5.5.3 Use of Personal Vehicle

Employees using their personal vehicle for authorized MEOPAR travel will be reimbursed at the applicable NJC kilometric rate. Only distances directly related to business travel are eligible for reimbursement. Travelers must maintain valid auto insurance. MEOPAR does not reimburse insurance premiums, maintenance, or liability costs.

MEOPAR assumes no responsibility for damage, loss, or injury associated with personal vehicle use during travel.

5.5.4 Parking

Parking expenses that are directly related to MEOPAR travel are eligible for reimbursement. This includes airport parking, hotel parking, and parking fees incurred during business-related activities (e.g., conferences, meetings, site visits). All parking expenses must be supported by original, itemized receipts. Fines or penalties, such as parking tickets or towing charges, are not reimbursable under any circumstances.

5.6. Travel Insurance Requirements

Employees traveling outside their home province or Canada on MEOPAR business must have adequate emergency medical insurance, including coverage for hospitalization, medical evacuation, and repatriation. MEOPAR will reimburse the cost of travel medical insurance if it is not already covered through a provincial health plan or group benefits.

Travelers should:

- Consult with MEOPAR's finance and administration team to confirm existing coverage.
- Purchase additional temporary coverage if necessary.
- Include proof of insurance or receipts when submitting claims.

6. Lost, Stolen, or Damaged Personal Property

MEOPAR is not responsible and does not reimburse for the loss, theft, or damage of personal items during travel. Employees are encouraged to take precautions to protect their belongings and, where applicable, use personal insurance to cover any such losses.

7. Expense Claim Submission

Advance travel payments will only be issued under exceptional circumstances and must receive prior approval from the Executive Director. Examples of such circumstances include travel to



remote locations where electronic payment methods are not accepted, situations where significant upfront costs are required (e.g., international visa fees or conference registration fees), or when the employee does not have access to a corporate credit card and would experience undue financial hardship. All requests for advance payments must be submitted in writing with appropriate justification and documentation.

Travel and hospitality claims must be submitted within 5 business days of the traveler's return and no later than 10 business days. Claims must include the approved Travel and Hospitality Budget Forms, original paper, or scanned, and or electronic receipts (excluding per diems), and a completed MEOPAR's Travel Claim Form. If a receipt is lost, a credit card or bank statement may be considered and accepted as a substitute, subject to approval. Claims will be reviewed and processed within 15 business days, provided all documentation is complete and accurate.

8. Overpayments and Exceptions

Any overpayments made to travelers in error or due to ineligible claims must be repaid to MEOPAR and will be treated as a debt owed. Exceptions to this policy may be granted only in exceptional circumstances and require a written justification with prior approval from the Executive Director.

9. Emergency Travel

In the event of emergency or unplanned travel, the request will be expedited through the approval process, with final approval by the Executive Director.

10. Grantees

MEOPAR provides travel and hospitality support to grantees as part of its funded initiatives. Grantees are defined as organizations or individuals who receive funding for travel-related activities as part of research collaborations, stakeholder engagements, conferences, and other MEOPAR-related initiatives.

Travel expenses for external recipients, including partners, consultants, and academic teams, may be approved by their respective organizational policies, and in line with their respective funding agreements. MEOPAR would not consider the travel expenses eligible if the expenses were higher than what would have been approved through MEOPAR's travel policy.

10.1. Eligibility:

Travel and hospitality expenses may be covered for grantees who meet the following criteria:



- Participation in a funded research initiative or strategic partnership.
- Attendance at conferences, workshops, or training relevant to MEOPAR's mission.
- Involvement in activities that advance MEOPAR's scientific, research, or policy goals.

10.2. Funding and Reimbursement:

Travel and hospitality expenses for grantees may be directly funded by MEOPAR or reimbursed based on submitted receipts and justifications. All expenses must align with MEOPAR's Travel and Hospitality Policy and be in compliance with the approval process outlined in this document.

10.3. Tracking and Reporting:

All expenditures related to grantees will be tracked by the Finance and Administration team and reported in quarterly financial summaries. This will include a breakdown by recipient, activity, and fund source to ensure transparency and accountability.

10.4. Approval Process:

Grantee travel will be approved at the time of signing a funding agreement to ensure any travel plans are in line with the MEOPAR Travel and Hospitality Policy, and overall goals and objectives.

10.5. Compliance:

MEOPAR reserves the right to request information from Grantees to ensure that funds are used appropriately and in line with the intended outcomes of the funded project or activity.

11. Review and Update

This policy will be reviewed at least once per year as part of the annual plan review process, or sooner if there are updates to the NJC Travel Directive or Treasury Board guidelines. MEOPAR may also revise the policy based on operational needs or feedback from staff and stakeholders.

MODIFICATION/REVISION HISTORY

Rev No	Approval Date	Effective Date	Key Updates
1	9 June 2025	10 June 2025	
2			
3			