

Travel Policy

Overview and Objective

Travel is a necessary component of connecting the world's best minds through global research networks. The objective of this policy is to facilitate travel in support of CIFAR's mission by providing reimbursement guidelines for cost-effective travel with the greatest possible flexibility. CIFAR is a not-for-profit organization that relies on both public and private funds to operate its programs. CIFAR researchers and staff have a duty to ensure that these funds are directed in a responsible manner towards CIFAR's program goals.

Scope

This policy applies to all CIFAR staff, the Board of Directors and Advisory Councils, program members, students and guests travelling for activities related to CIFAR.

Air & Rail Travel

- Air travel should be booked using the **least expensive economy class** fare consistent with other constraints on your travel (e.g. preferred airline, time of day). Advanced booking, at least 14 days, is strongly advised to obtain the best fare.
- CIFAR advisory committee members and research council members requiring intercontinental travel are permitted business class fare.
- We recognize that there are other occasions when a higher economy class or business class fare may be appropriate. However, any such fare must be pre-authorized by the CIFAR office. If a premium fare is purchased without prior approval, the claimant will be reimbursed the equivalent least expensive economy class fare only.
- Airline charges for a first checked bag and seat reservation are allowable expenses.
- Flight cancellation insurance is an allowable expense. Airline/rail change fees are reimbursed if pre-approved by an authorized member of CIFAR staff or in extenuating circumstances. Approved fees will normally be covered up to a maximum of \$100.
- No reimbursement will be provided for tickets purchased with frequent flyer points.
- Rail travel should be booked in the least expensive coach/comfort class fare, as long as the cost does not exceed the economy airfare applicable to the given destination. Business class fare would be permissible for rail service to destinations where the travel time exceeds 4 hours and the cost does not exceed the applicable economy airfare. If overnight travel is necessary, sleeper class may be used.

Car Travel

Personal automobile

- The rate of reimbursement for use of personal automobiles is \$0.47 per km (\$0.47 USD per km in the US). This is expected to cover all relevant costs (fuel, insurance and depreciation).
- Use of a personally owned vehicle will be reimbursed for trips up to 500 km in round trip length. For longer trips, mileage reimbursement will not exceed the cost of regular economy airfare or equivalent least expensive mode of transportation. CIFAR reserves the right to reduce a mileage claim to an amount comparable to other forms of transportation.
- When claiming for mileage, the starting and ending point must be included with the claim. Reimbursement will be made for the most direct route only.
- The traveler is responsible to ensure they have adequate insurance coverage.

Car rental

- Rental cars will be reimbursed when less expensive transportation is not available. CIFAR reserves the right to reduce the claim to an amount comparable to other forms of transportation not exceeding the cost of least expensive economy airfare.
- The standard for vehicle rental is a mid-size car. For group travel where a vehicle rental is the most economical means of travel, rent one vehicle for each four travellers. Please indicate all passengers travelling in each vehicle. Request the lowest available rate at the time of booking.
- CIFAR will reimburse the cost of collision damage waiver and liability insurance.
- Gasoline is an eligible expense. Ensure that you fill up the gas tank before returning the car to avoid a costly gasoline surcharge.

General Automobile

- CIFAR shall not be held responsible for any accidents, injury or death to persons or damage to property arising from use of a motor vehicle.
- Additional charges for parking, bridge, ferry and highway tolls are eligible expenses.
- Fines for parking and other traffic violations are not allowable expenses.

CIFAR Travel Combined with Other (personal or business) Travel

- When CIFAR travel is combined with other (personal or business) travel, reimbursement will be made for only the CIFAR portion of the trip at the lowest available fare. A written explanation must be provided in all cases where CIFAR travel is combined with other travel.

Hotel/Accommodations

- CIFAR books hotels at group rates for program meetings and workshops.
- For other CIFAR-related travel, the standard for accommodation is a single room with a private bath in a conveniently located business class hotel. Use of luxury accommodation (rated 5-star by North American standards) will not be reimbursed, unless the rate is equivalent to a business class hotel. Please use online resources/websites to obtain the best available rate.
- Travelers staying with relatives or friends may claim \$30 per night in lieu of accommodation cost.
- If a guest accompanies the traveler, the amount to be claimed by the traveler should only be the most economical room rate for a single occupant. Any excess room charges to accommodate the guest are not reimbursed.
- All incidentals, with the exception of internet fees, are the responsibility of the traveller. CIFAR will reimburse room + tax, and internet fees only. In cases where CIFAR is managing hotel bookings, only internet fees will be reimbursed.
- For individual travel, if reservations must be cancelled, it is the responsibility of the traveller to make sure that cancellation is made in advance so that “no show” charges will not be incurred.
- In cases where CIFAR is managing hotel bookings, contracts at group rates require additional notice for cancellations. CIFAR staff (preferably the meeting coordinator) must be informed of any changes to arrival and departure dates, or cancellations **at least 7 days in advance**. Changes in arrival dates in less than 7 days or “no shows” may result in the hotel cancelling all nights booked and charging CIFAR at the full rate for no-show nights. If you change your arrival dates and fail to inform a CIFAR staff meeting coordinator, you may be charged for no-show nights, except in case of medical emergencies or other extenuating circumstances.

Meals

- Reimbursement will be made for **actual** meal expenditures up to the following maximum amounts: **Breakfast \$15.00; Lunch \$15.00; Dinner \$40.00. Receipts are required. Only reasonable alcohol expenses are reimbursable.**
- The maximum amounts for meal costs incurred in the United States are the same as those for Canada (as set out above) but in US funds.
- **Please note that CIFAR does not offer a per diem; only actual meals with corresponding receipts, including amount and gratuities, will be reimbursed at the allowable rates.** Please note that group meals are frequently provided by CIFAR. In these cases, additional meals consumed will not be reimbursed.
- For self-organized dinners of small ad hoc groups of CIFAR program members and meeting guests of 2 or more, the allowable rates per person must be adhered to, and **a list of names must be provided on the back of the receipt.**

- If a guest accompanies a program member, guest speaker or other invitee, you are responsible for the meal costs incurred by your guest.

Childcare

- The eligible cost for a nursing mother or single parent who is travelling with a caregiver and a child under two years of age is limited to travel and accommodation costs up to a maximum of the cost of airfare, meals and accommodation for the travelling caregiver, **in lieu of child care expenses.**
- A single parent with children under the age of 12 not accompanying the parent to the meeting may claim overnight childcare expenses when unpaid alternatives are not available.
- For children under the age of 12 accompanying parents to the meeting, without an additional caregiver, the eligible cost is limited to childcare costs during the meeting and other meeting related events. This applies only when both parents are participating in the CIFAR meeting. Please complete a copy of the CIFAR Child Care form, to be attached to the reimbursement claim.

Other Eligible Expenses

- Immigration VISA fees (passport and immigration fees will not be reimbursed)
- Transaction fees levied by travel agency, and taxes associated with airfare purchased with frequent flyer points
- Any travel expenses related to physical/medical disabilities of the traveller
- Reasonable gratuities
- Reasonable expenditures for taxis and public transportation to and from airports, railway stations, and between event venues are permitted. Original receipts must accompany the expense report, including the business purpose of the travel

Ineligible Expenses

- Any expenses related to accompanying travel companions (with the exception of caregivers for children)
- Non-business or personal expenses
- Personal travel insurance (medical, baggage); trip cancellation insurance is an eligible expense.
- Premium seats. Exceptions will be made for medical reasons, if pre-authorized by authorized CIFAR staff. CIFAR reserves the right to request a doctor's note.
- Pet care expenses
- Interest charges levied on overdue invoices or credit card statements

- Bank/Credit card charges related to foreign exchange fees, debit fees and/or annual service fees
- Fees related to deposit of bank drafts and cheques
- Unnecessary stopovers or excess personal baggage
- Lost or stolen items
- Personal hotel expenses including movies, personal telephone calls and mini-bar charges
- Expenses for failure to cancel transportation or hotel reservations

PLEASE NOTE:

All claims must be submitted as soon as possible after the meeting date. Claims received after **3 months** cannot be reimbursed.

Only original itemized receipts are admissible. Credit card slips or statements are not admissible. Exceptions will be made for taxi and group meals (where individual receipts were not issued). This conforms to Revenue Canada guidelines for receipts, and allows CIFAR to claim back a portion of the admissible taxes.

Scanned copies of original receipts may be submitted. We may require you to provide the original receipts up to 6 months after a claim is submitted. CIFAR also reserves the right to request additional information in justification of any claim and may decline a claim if a satisfactory justification is not provided or if a required pre-approval has not been met.

The exchange rate will be calculated by CIFAR unless proof of the exchange is provided.

CIFAR complies with Accessibility for Ontarians with Disabilities Act (AODA). Please let us know if you have any special needs that require accommodation.