	Title:	Conference, Seminar and Training Expenses		
	Number:	HR – 017		
	Revision Date:	June 2022	Approved by:	CLT
	Revision Number:	0	Area:	Corporate
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1.0 Purpose and Scope

This policy defines the conditions and application process for expenses related to conferences, seminars, and training. This policy applies to all permanent full-time employees. This policy does not cover educational courses that lead to an acquisition of an academic undergraduate degree, diploma, or certificate. Refer to the Tuition Reimbursement Policy.

Employees should also refer to the Travel and Corporate Expense Policy, FIN-001-0011

2.0 Definitions

Conference/Training/ Seminar: Formal meetings, of at least ½ day in length that are focused on a particular topic or series of topics related to an area of specialization. This learning does not result in the awarding of an academic degree, diploma, or certificate.

P-CARD: Refers to the city’s Purchase Card system and its policies and procedures.

Out-of-pocket expenses: An expense incurred and paid for by an individual for personal use or relating to one’s employment or business.

Incidentals: Including fees and tips for porters, baggage handlers, and other personal service for employees relating to one’s employment or business.

Receipts: Proof of payment that is itemized and includes all taxes paid.


3.0 Procedures

3.1 Eligibility

- Permanent full-time employee having successfully completed their probationary period
- An employee in good standing with no current performance or attendance concerns

3.2 Application and Approval

- All funding for conferences, seminars, and training will be funded by the department, unless otherwise approved.
- All in-province conferences, seminars, and training are subject to pre-approval by the employee’s Director.

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- All out-of-province, including out of country, conferences, seminars, and training are subject to preapproval by the CAO.
- Representation at any conference, seminar, or training should be limited to one employee per department unless attendance of additional employees has been approved in advance by the Director.
- This attendance can be initiated by either the employee or management but must be endorsed by management.
- Employees are required to complete a Conference, Seminar, and Training application form.
- All applications require approval as per this procedure, up to and including the CAO, where specified.
- Approval must be gained prior to registration.
- Once an employee's request has been approved, the employee can proceed to register. Where there is special pricing for early registration, the employee is expected to take advantage of the reduced fee.

3.3 Conference Arrangements:

- Cost considerations for travel, accommodation, and other expenses should be considered prior to attendance (e.g., carpooling, car rental, sharing of registration tags, airfare verses mileage cost, online options), and in accordance with the Travel and Corporate Expense Policy.
- Things such as employee travel time, weather conditions, and other safety concerns may influence management's decision making and give cause for Directors to approve provisions outside of this procedure.
- Any exception to these procedures must be documented and necessary approvals must be in place prior to expenses being incurred.

3.4 Registration:


- Prior to registration, employees are required to complete a Conference, Seminar, and Training application form. All applications must be approved prior to registration.

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- Employee registration is the responsibility of the applicable department. Registration should be completed early to realize any early registration discounts where possible.
- Payments can be completed using the employee’s P-CARD or another delegate within the department.

3.5 Travel


- When air travel is the most economical method, air travel costs to and from the event will be paid/reimbursed to a maximum of economy airfare including all applicable taxes, surcharges, and cancellation insurance.
- Ground transportation to and from the airport will be reimbursed for the actual cost. Employees are expected to find the most economical transportation.
- Use of a city vehicle for ground travel should be considered where possible. City vehicles are only to be used for travel to and from the conference and cannot be used for personal travel while attending the conference.
- If car rental is required, employees are requested to rent mid-sized or compact vehicles. Fuel and rental costs are eligible expenses. Rental cars are only to be used for travel to and from the conference and cannot be used for personal travel while attending the conference.
- When travel by train or bus is the most economical method, fares will be reimbursed to a maximum of economy (coach) travel.
- When a personal vehicle use is the most economical method, mileage will be reimbursed at the current rate per kilometre, plus any parking and toll costs, related to travel to and from the conference and excluding personal travel, providing the total cost for both does not exceed the economy airfare and air travel costs or the economy train or bus costs noted above.
- Carpooling and use of a city vehicle or car rental should be considered where possible. Mileage will be paid from the location of employment or the employee’s home whichever is closer.
- The city assumes no financial responsibility for privately owned vehicles other than paying the kilometric rate.

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- Note: Toll costs will be limited to trip toll charges and will not include amounts related to the purchase of a transponder.
- Note: All travel costs must be substantiated with receipts except for mileage reporting

3.6 Accommodations

- All hotel accommodations must be approved by the employee's Director in advance.
- Accommodations will be paid at single occupancy rate or at the conference rate for duration of event including travel time of up to one day if necessary.
- If the employee fails to stay in the accommodations arranged, and does not notify their supervisor in advance, the cost of the accommodations will be deducted from their pay.
- Payments can be completed using the employee's P-CARD or other delegate within the department.
- Hotel accommodations for multiple day events will be paid for if the event is over 120 kilometres from city hall.
- Hotel accommodations between a 40- and 120-kilometre radius must be approved by the Director.
- Hotel accommodations will not be paid for conferences less than 40-kilometre radius of city hall, without approval from the CAO.
- Room charges for personal services such as entertainment, mini-bar, room service, laundry service, pay TV or movies, or special facility charges are the responsibility of the employee.
- All accommodation charges and/or reimbursements to employees must be substantiated with receipts.


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3.7 Meals, Gratuities, and Incidentals

- In accordance with the Travel and Corporate Expense Policy FIN-001-0011

3.8 Reimbursement

- Reimbursement will be provided upon successful completion of the conference, seminar, or training session.
- When personal travel is combined with business travel, the employee will be reimbursed for only the business portion of the trip. Travel arrangements where personal travel is combined with business travel must be brought to the attention of the approver prior to booking the travel. It is the employee's responsibility to make sure the allocation of business versus personal travel is made clear.
- The Expense Claim form must be completed and submitted to Finance, once approved, for reimbursement of out-of-pocket expenses after attending the conference.
- All expenses must be indicated on the form, including expenses paid using a P-CARD or through Accounts Payable.
- Original receipts for P-CARD related expenses must be attached to the statement and all other expenses must be substantiated by original receipts unless a per diem was provided.
- Examples of non-permitted expenses include alcohol, childcare, parking fines, lost or stolen items, normal commuting costs, clothing, donations, spousal or guest expenses and entertainment (tours and additional individual events are the responsibility of the employee).
- Reimbursement of all conference, seminar and training expenses will be paid during the next Accounts Payable run.


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- In translating expenses paid in foreign currencies, the rate to be used should be as follows:
 - For cash payments, the rate paid when the foreign currency was purchased.
 - For credit card purchases, the rate used by the bank to convert the purchase to Canadian dollars.
 - Where proof of payment is not available, or in absence of a rate, the Department should assess the reasonability of the rate by comparing it to the prevailing rate at the time the expenses were incurred. For rates that are not available, Finance will refer to an on-line currency conversion rate in effect for the specific day / period.

4.0 Responsibilities

4.1 Employee


- Obtain necessary authorization for attendance at conferences, seminars, training in advance of attending.
- Become familiar with and adhere to the principles and requirements outlined in the policy, including the Travel and Corporate Expense Policy.
- Take advantage of “early bird” registration discounts once all appropriate approvals have been received.
- Arrange the most appropriate and cost-effective method of travel in accordance with policy and procedure.
- Book accommodation in accordance with policy and procedure.
- Provide the conference itinerary to your approving Manager/Director.
- Retain all receipts relating to expenses incurred to substantiate reimbursement or P-CARD reconciliation.
- Fully understand the code of conduct, as you are representing the city.
- Spend city funds appropriately and ensure all expenses are defensible as they are subject to audit and public scrutiny.

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- Staff who attend a conference, seminar, or training during regular business hours should follow the attendance tracking procedure and note the correct attendance code on the timesheet.
- Overtime for additional time spent at these events will not be paid out unless pre-approval is granted prior to the event.

4.2 Director

- When reviewing an application, ensure there is a benefit to the city and employee.
- Approve attendance at in province conferences, seminars, and training.
- Learning can be initiated by either the employee or management but must be endorsed by management. The learning/experience should be related to development for future career goals within the employee’s career path or for the purposes of succession planning.
- Ensure that the appropriate pre-approvals have been obtained prior to registration.
- Approve the attendance of more than one employee from a department at the same event.
- Encourage cost saving practices (i.e., carpooling, use of city car, car rental, sharing registration tags).
- Ensure that there are extenuating circumstances when approving hotel accommodation for less than 120 km from town hall and provide reasons to the Commissioner for less than 40 km from town hall.
- Ensure adequate funding in the current year operating budget.
- Approve the expense submission form and submit to Finance.

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4.3 CAO

- Approve hotel accommodation for within 40 km from city hall.
- Approve attendance at out-of-Province conferences after determining there is a benefit to the city and staff in attending.

4.4 Finance

- Process reimbursement payment.
- Ensure that full audit trail is consistently available for internal and external auditors.
- Review P-CARD packages and invoices, ensuring that appropriate receipts are attached to substantiate the expense.
- Ensure HST rebates are recovered and credited to the business units.
- Review and updated the Travel and Corporate Expense Policy and Expense Reimbursement Form.

5.0 Attachments

- Expense Reimbursement Form
- Travel and Corporate Expense Policy

Revision History

Date	Description of Change	Initials