



Canada West Region Expense Policy

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AUTHORITY: Canada West Region Board

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PURPOSE

The purpose of this policy is to outline clear guidelines for reimbursing Canada West Region Board Members' expenses related to: travel, accommodation, meals, conference/event registration and/or other related costs.

DEFINITIONS

For purposes of this policy:

- **'event'** means conference, gathering, meeting or other activity at which leaders learn, contribute and engage with other IABC leaders and members
- **'designated leader'** means a leader selected by the Canada West Region Board to represent the Board at events.
- **'senior executive'** refers to chair, vice chair and past chair
- **'executive'** refers to chair, vice chair, past chair and directors
- **'full board'** refers to chair, vice chair, past chair, directors and the Vice Presidents of the region's chapters
- **'expenses'** include (unless otherwise specified):
 - **travel** including economy flight, vehicle, rail, bus, taxi/ground transportation to and from the event. Upgrades to travel are not covered; the individual is responsible for the difference between economy and the upgraded rate. Mileage is based on CRA rates.
 - **accommodation** *only* as required for the event, based on rates for a standard room. Extended stays, and hotel upgrades, are the responsibility of the individual
 - **meals** *only* when they are not provided by the event. Alcohol and cannabis are not eligible for reimbursement
 - **event registration fees**

PRINCIPLES

The Canada West Region Board recognizes the value of building relationships within the region, with other regions and with the broader membership of IABC. Canada West Region is a leader and active participant on the global IABC stage. As such, the following principles apply in order to facilitate Canada West Region leaders' participation at key events.

Statement: We believe it is important for Canada West Region leaders to be present at local, regional and international events to represent the interests of the region.

- Travel and registration expenses should not be a barrier for designated leaders to participate in events. People can use the corporate credit card, if needed, to book travel. Payment options.
- Expense limits are subject to annual budget allocations. Limits on overall expenses may be imposed, depending on available funds.
- Accommodation is based on each designated leader having his/her own room. Designated leaders attending the same event are encouraged, but not expected, to share a room if that fits for them. Consideration will be given to personal needs, health requirements or other factors.
- Expenses for companions accompanying designated leaders are not covered.
- Designated leaders understand that their active participation at events is a requirement for having expenses reimbursed. This means being fully present and engaged during the event.
- Participation can be in-person, or virtually as available. Personal needs and requirements will be taken into account so that travel to an event is not a barrier to participation.
- Designated leaders attending events understand that they are representing a nonprofit and therefore every effort should be made to keep costs as low as possible.
- As representatives of the Canada West Region, designated leaders understand that their behaviour at the event must align with the IABC Code of Conduct.
- Designated leaders will forego any expense claims if their employers are paying any or all of their event-related expenses (travel, accommodation, meals, registration, or other).
- Designated leaders will adhere to all health protocols, restrictions or other laws as required.

DESIGNATED LEADERS FOR SPECIFIC EVENTS

For each specific event, there are designated leaders for whom costs are covered. NOTE this is a guideline, and ‘who/what’ is covered is subject to change based on available budget funds each year.

Designated Leader	Dare to Lead	CWR Conference	Virtual Leader Institute (LI)	World Conf + LI
Senior Executive (Region Chair, Vice Chair, Past Chair)	Travel, Meals, Accommodation, Registration	Travel, Meals, Accommodation, Registration	Registration (2 provided by HQ, 1 must be budgeted)	Travel, Meals, Accommodation, Registration (2 provided by HQ, 1 must be budgeted)
Full Board (CWR Directors and Chapter VPs)	Travel, Meals, Accommodation, Registration	Travel, Meals, Accommodation, Registration	Registration	
Chapter Leaders	Annual grant*		Annual grant*	Annual grant*

*Annual grant amounts will be set each year by the Canada West Region Board and provided to the Chapters to disperse at their discretion to Chapter Board members.

PROCEDURES

At the start of each Canada West Region Board term, the Board will identify the expense budget for events. The Board will identify any limits, reductions or additions to the above chart, based on the financial realities at the time. The Board will also understand what, if any, grants or free conference registrations are being provided by IABC International.

As of March 2022, IABC International currently provides two complimentary registrations for virtual Leadership Institute, held each February; and two complimentary registrations for World Conference, held each June. This is subject to change and must be confirmed on an annual basis.

Each designated leader attending an event must:

- **Book** his/her own travel and accommodations. Designated leaders must purchase travel insurance, the cost of which is reimbursable. Mileage is reimbursable according to the current Canada Revenue Agency rates.
- **Register** for the event at the earliest possible time so as to take advantage of any early bird rates. Where IABC HQ is providing a complimentary registration, the designated leader must obtain the promotional code PRIOR to registering for the event.
- **Gather receipts** for reimbursement. No expense will be reimbursed without a receipt.
- **Complete** the expense reimbursement form, attach receipts and submit it to the Finance Director and Chair for approval.
- When approved, the Finance Director will **forward for payment**.
- All expenses must be submitted **within 30 days of the event**.
- Prompt reimbursement will be provided. Work with Finance Director to arrange payment options.