

Diocese of Nova Scotia and Prince Edward Island  
**HR Policy 2.1.2: Diocesan Travel Policy**

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***January 1, 2024, use of a personal automobile for Parish or Diocesan business shall be reimbursed as follows: \$0.62 per kilometre, exclusive of mileage tiers. Reimbursement is subject to the following Travel Policy.***

### **1. PURPOSE**

#### **Clergy, Lay Volunteers, Diocesan Office Staff (Clergy and Lay)**

Participating in activities within the Anglican Diocese of Nova Scotia and Prince Edward Island often necessitates travel, whether as a component of ministerial responsibilities, office duties, or other pastoral or administrative reasons. The purpose of this policy is to establish a framework for the equitable assessment of travel arrangements and associated expenditures.

### **2. OVERVIEW**

This policy assists employees, volunteers, and diocesan leadership with guidelines and reporting requirements in alignment with diocesan expectations and Canada Revenue Agency regulations. All travelers are responsible for ensuring cost-effective travel. Although this policy aims to be comprehensive, it cannot cover every possible situation. Travelers are expected to apply these guidelines judiciously, consistent with normal living standards. In cases where the guidelines do not provide specific instructions, travelers should reach out to the Executive Director and/or Financial Controller of the diocese to facilitate process and parameters for reimbursement.

### **3. SCOPE**

This policy applies to travel connected with the operations and ministries of the Anglican Diocese of Nova Scotia and Prince Edward Island.

Reimbursement of expenses will not apply in the following circumstances:

- Mileage to and from residence and place of work (usually the church, with exceptions made for those rectories in a multi-point parish with a dedicated office space);
- Recreational visits or journeys (such as visiting a former parishioner);
- Travel costs that exceed reasonable expenses for the journey or where reasonable shared travel options have not been considered.

### **4. PRIVATELY OWNED VEHICLES**

The following conditions apply where the diocesan administration provides a vehicle allowance for using a privately owned vehicle:

#### **(a) Vehicle Condition**

The owner of the vehicle must ensure that their vehicle is in a dependable and roadworthy state. It should be registered and adequately insured to be suitable for the intended journey.

#### **(b) Reimbursement Rates**

A per-kilometre vehicle allowance applies when individuals drive their personal vehicles for approved ministry or official duties travel. The Diocesan Council sets the reimbursement rate. Reimbursements will normally be made upon the fulfillment of the trip, following the submission of a travel expense claim form. While travel reimbursement will normally be based

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on actual kilometres traveled, there may be situations that require special considerations such as those outlined in Section 12 of this policy.

**(c) Additional Responsibilities Related to Driving**

An individual operating a private vehicle as part of their church-related responsibilities or duties shall:

- Possess a valid driver's license recognized in Nova Scotia or Prince Edward Island, applicable to the specific vehicle they are driving;
- Maintain a safe and cautious driving approach;
- Adhere to all traffic and parking regulations;
- Confirm that they are physically and medically fit to drive safely;
- Ensure they are not under the influence of alcohol, medication, or any substances that may impair their ability to drive; and,
- Accept responsibility for any fines or penalties incurred in the event of traffic violations.

**5. ALTERNATIVE MODES OF TRAVEL**

The diocese expects transportation choices to be made based on practicality and cost-effectiveness.

**(a) Air Travel**

All employees embarking on air travel must adhere to the Lowest Fare Routing (LFR) policy. LFR entails securing the most logical lowest fare for the business trip, with the objective of:

- Realizing cost savings for round-trip air tickets; and,
- Ensuring a reasonable layover time for connecting flights.

Travel reservations should be made well in advance to leverage available discounted airfares. Travelers enrolled in airline incentive programs may utilize their personal upgrades in conjunction with the diocese's booking of the lowest available fare.

The diocese may sanction reasonable stopovers along the route if the travel expenses claimed from the Diocese do not exceed either the actual cost or the cost of the applicable airfare between the departure point and the business destination, whichever is lower. Advance approval must be secured from the diocese for such stopovers. If a stopover is undertaken, the Diocese assumes no responsibility or liability for any actions or events during or arising from the stopover.

Airline tickets are treated as legal tender. Any unused tickets or ticket segments should be submitted to the ticket issuer for credit, and this credit should be reported when requesting reimbursement from the diocese.

**(b) Car Rental**

Prior authorization from the Diocesan Office is essential to rent a car. Insurance must be obtained for the rental car. Car rentals are typically the most costly means of transportation and should only be considered when the nature of the trip or the location of the individuals to be visited makes the use of local transportation impractical or more expensive.

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**(c) Taxis**

Taxis may be used when no other reasonable and cost-effective transportation options are readily available. When traveling away from home, efforts should be made to choose overnight accommodations that minimize or eliminate the need for taxis or other local transportation. In cases where taxis are used, sharing the taxi with other individuals traveling for diocesan business is encouraged whenever possible. Travelers must obtain a receipt from the taxi driver detailing the fare charged.

**6. MEALS AND ACCOMMODATION**

Individuals authorized to travel as part of their church-related roles or duties are eligible for reimbursement of reasonable expenses associated with lodging and meals, in addition to transportation expenses. Travelers are encouraged to make judicious choices when selecting accommodations and meals.

Itemized receipts for all expenses are mandatory and must be provided. Reimbursement will not be made in the absence of a receipt.

**7. CHILDREN**

No one should transport children unless they have a current police criminal record check for the vulnerable sector, registered with the diocese. Normally written permission is required from each child's parent or guardian, in cases where the parent or guardian is not present.

**8. TRAVEL AUTHORIZATION**

The appropriate authorizers of travel are generally:

<u>Organisation</u>	<u>Authorizer</u>
<b>Diocesan Administration</b>	
<ul style="list-style-type: none"><li>Ministry purpose</li><li>Staff travel</li></ul>	Bishop (or as delegated) Bishop, Financial Controller, Executive Director or delegate
<b>Parish</b>	
<ul style="list-style-type: none"><li>Clergy</li><li>Warden</li><li>Other person</li><li>Synods/Councils/Committees</li></ul>	Executive or Warden Executive Executive or Warden Bishop, Financial Controller, Executive Director or delegate

Where travel is conducted for more than one entity, authorisation is required from each with a prior agreement of how expenses will be shared.

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## **9. REIMBURSEMENT**

To request reimbursements, individuals must complete an Expense Reimbursement Claim Form and provide either original or copied tax invoices for any expenses related to fares, lodging, or meals. Claims for travel will show the point of origin and destination, number of kilometres traveled and the reason for travel. Expense claims will normally be submitted no later than two weeks after the month end in which the travel was incurred.

## **10. DIOCESAN OFFICE RESPONSIBILITIES**

- Review expense reports for appropriate cost center codes, the signature of the approving staff member, and calculation accuracy;
- Ensure that all expenses are reasonable, support diocesan goals, and are in accordance with diocesan guidelines. Expenses not deemed reimbursable should be discussed with the individual requesting reimbursement;
- Pre-approve special expenditures, including car rentals, special event registrations, or additional expenses related to official business (approval from the Bishop and/or Financial Controller);
- Efficiently manage business expenses to minimize costs;
- Return all reimbursement requests necessitating further substantiation; and,
- Pay expense claims within 7 business days of receipt.

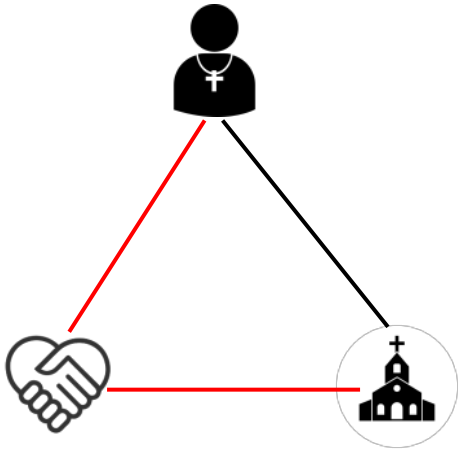
## **11. PARISHES**

Parishes may customize this policy for reimbursing travel and vehicle expenses to accommodate individual situations. If such customization is necessary, it should be formalized through a well-defined written agreement, signed by the traveler and the parish's authorizers. Any special arrangement should not compromise the safety or risk management provisions outlined in this regulation.

A parish may need to customize this policy in a situation where a clergy member resides outside the parish. In that case, eligible travel within the parish will normally be deemed to have commenced at the parish boundary closest to the clergy member's residence, and eligible travel outside the parish would normally be deemed to have commenced at the point of origin and ended at the destination.

*(Please see next page for 12. EXAMPLES FOR PARISHES, including diagrams and explanations for specific scenarios.)*

12. EXAMPLES FOR PARISHES

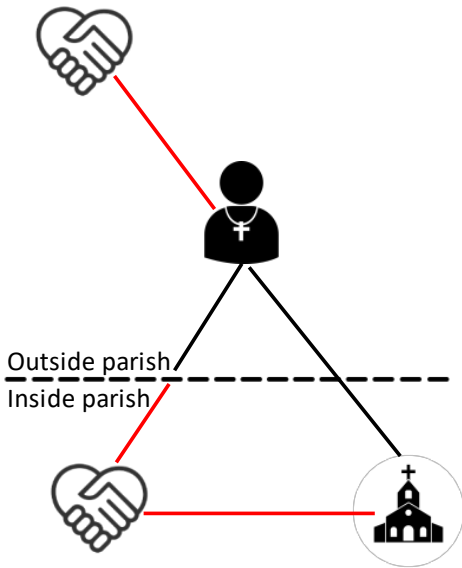


Eligible for reimbursement —

Not eligible for reimbursement —

12.1 An employee’s travel between the place of residence and the church is personal travel and is not eligible for reimbursement.

12.2 When required, travel directly between the place of residence or the church and a point of call, such as a visitation, is eligible for reimbursement.



Eligible for reimbursement —

Not eligible for reimbursement —

Special considerations apply where an employee lives outside the parish boundary:

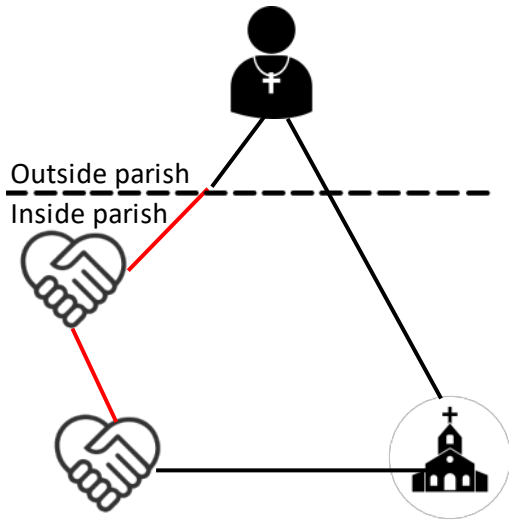
12.3 When required, travel directly between the place of residence and a point of call that is outside the parish boundary, such as a visitation, is eligible for reimbursement.

12.4 When required, travel directly between the place of residence and a point of call that is inside the parish boundary, such as a visitation, is eligible for partial reimbursement:

- The portion between the place of residence to the parish boundary is not eligible for reimbursement
- The portion between the parish and the point of call is eligible for reimbursement

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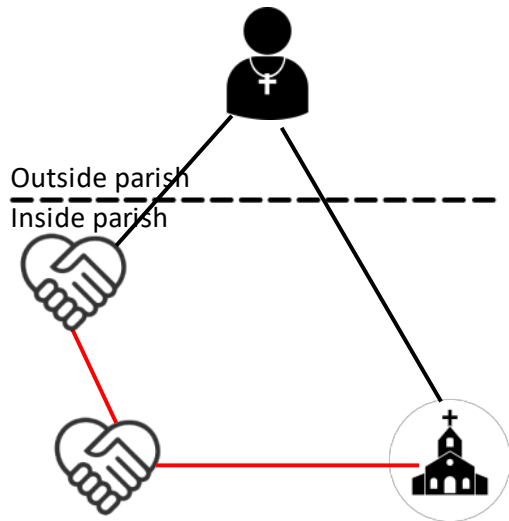
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Eligible for reimbursement ———

Not eligible for reimbursement ———

**OR**



Eligible for reimbursement ———

Not eligible for reimbursement ———

Canada Revenue Agency also has a special provision when an employee makes more than one stop between home and the place of work:

- 12.5 The employee may claim the travel from the church to the first stop, or from the last stop home, but not both.