



AP 513 EXPENSE REIMBURSEMENT

Approved: October 31, 2023
Amended: April 1, 2025
Reviewed: March 19, 2025
Due: June 30, 2026

Background

When an employee of the school is required to attend a professional development event, a business meeting or another school-related activity, and the employee's attendance is pre-authorized by his/her supervisor, the employee will be reimbursed for reasonable expenses associated with attending the event in alignment with Policy 2: Role of the Charter Board.

Employees who incur expenses in carrying out their authorized duties shall be reimbursed by the School Authority upon submission of a properly completed and approved expense claim with such supporting receipts as may be required. Such expenses shall be within budgetary allocations for the specific type of expense.

Definitions

Direct Report: The immediate supervisor and/or leader to the employee (eg. Principal, Superintendent, Secretary Treasurer)

Procedures

1. The School Authority shall compensate employees for approved travel, meals, accommodations and registration fees, for all claims submitted within 30 days of the expense being incurred, and only if such expenses have been pre-approved by the direct report of the person claiming the expense(s).
2. Whenever possible, it is expected that CGCS business meetings are held on CGCS premises with reasonable hospitality extended to non-employees.
 - 2.1. Expenses for meetings between/among staff members are considered personal expenses unless pre-approved by the Superintendent.
 - 2.2. Expenses for a school-wide professional development event are considered pre-authorized, but "staff only" meetings, which are included in the annual approved budget, are approved in consultation with the Superintendent.
 - 2.3. Expenses for meetings between CGCS employees and non-employees shall be pre-approved by the direct report of the person coordinating the meeting.

3. Employees are expected to use a School Authority purchasing method in making school-related purchases of supplies or services in place of personal resources, with the exception of accessing personal Professional Learning expenses.
4. Receipts are required for all business-related expenditures and reimbursements.
 - 4.1. Reimbursements will not exceed receipts or per diem allocations.
 - 4.2. Hospitality for meetings, as per CRA rules, must include:
 - 4.2.1. A statement of who attended,
 - 4.2.2. Where the meeting occurred,
 - 4.2.3. The length of the meeting, and
 - 4.2.4. The agenda.
 - 4.3. In the event that a receipt cannot be produced, a completed form *AF513 D– Missing Receipt Attestation* must accompany the reimbursement request.
5. In order to be reimbursed for reasonable expenses associated with CGCS work, AF513A is to be completed, signed by the supervisor and submitted to the Board office with receipts attached.
 - 5.1. *AF513A -Request for Reimbursement* forms must be submitted within one (1) month of purchase/expenditure.
 - 5.2. Expense reimbursement will normally take place within 30 days of submission of Form AF513A with supporting documentation, to the Board Office.
 - 5.3. The Secretary-Treasurer shall ensure the appropriate approval of expense claims.
6. When an employee is required to use his/her personal vehicle to travel outside of Calgary in order to attend a professional development conference or business meeting related to the school, the employee will be reimbursed consistent with the maximum amount set by the Federal Government i.e., the CRA rate.
 - 6.1. Reimbursement for travel by personal automobile will be set to match the current rate set by Canada Revenue Agency.
 - 6.2. Employees are expected to use modest means in travel and to choose the most reasonable and cost-effective option which may include a personal vehicle, rental vehicle, public transportation such as bus plus taxi, or airline when the fare and/or time involved make this option the most reasonable and cost effective.
 - 6.3. To the extent reasonable or possible, staff members attending the same function will be expected to travel together. The staff members may agree on the use of one person's private vehicle, or rent a vehicle to provide transportation for two or more parties. Sharing is less than the cost of two or more private vehicles travelling to the same destination. An employee who refuses shared transportation may not be eligible for reimbursement because of the additional expense to the school.

7. Expenses that are most typically reimbursed include:

- 7.1. Meals – to pre-approved maximum daily allocation of one hundred and six dollars (\$106.)
Incidental expenses of seventeen dollars (\$17.) Attach receipts to the purchase card statement.
- 7.2. Accommodation – at conference rates (if applicable);
- 7.3. Transportation—at the lowest available airfare/mileage from CGCS to destination and parking as required;
- 7.4. Registration fees;
- 7.5. Personal items will not be reimbursed. Snacks and beverages during the day such as sodas, coffee, and tea are considered personal items. Alcohol is not eligible for reimbursement; and
- 7.6. Combined travel with other professional or personal activities must be approved in advance by the Superintendent, and if approved, only the portion directly related to CGCS business may be claimed for reimbursement. Air fare associated with combined travel is reimbursed at no more than the lowest rate available on the day that the employee completes his/her CGCS related travel.
- 7.7. Only the Superintendent may, at her/his discretion, approve trips outside of Alberta.

Reference: Education Act, s.52, 53, 140, 196, 197, 204, 222, 225