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Expense Reimbursement Policy	Approval Date: September 26, 2025
	Approved By: Council (C-572-4.2)
	Effective Date: January 1, 2026

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1 Statement of Principles

At Professional Engineers Ontario (hereinafter referred to as "PEO"), our policies are guided by a commitment to uphold our core values and principles. We strive to maintain an inclusive work environment that respects all identities, cultures, and abilities. Our policies are developed to support the integrity of our operations, ensure consistency with our mission, and guide our approach to decision-making, thereby promoting a culture of responsibility and continuous improvement across all facets of PEO.

2 Purpose

The purpose of this policy is to set out fair and reasonable rules and principles for the reimbursement of expenses incurred while conducting PEO business. It also provides a framework of accountability to guide the effective use of resources in the reimbursement of expenses.

3 Application and Scope

This policy sets out the rules for managing travel, accommodation, meals, and other miscellaneous expenses for:

- all current members of PEO Council;
- all current members of PEO committees, working groups, and task forces;
- all current volunteers of PEO Chapters;
- all PEO staff.

The policy includes the following:

- Appendix A: Travel expense reimbursement
- Appendix B: Accommodation expense reimbursement
- Appendix C: Meals expense reimbursement
- Appendix D: Other/miscellaneous reimbursement
- Appendix E: Expense claims appeals procedures

Payment of expenses is limited to covering out-of-pocket expenses incurred and is subject to the limits outlined in this Expense Reimbursement Policy.

Where the Ontario Government pays expenses for Lieutenant Governor in Council-appointed Councillors (i.e., those who are not members of the Association), PEO will reimburse any incremental difference between the actual expense incurred subject to the limits in the Policy and the Ontario Government reimbursement rates.

4 Definitions

This section defines key terms used within the policy to ensure that these terms are consistently interpreted by the readers of the policy.

Accommodation Expense - refers to hotel expenses incurred only for approved attendance at PEO meetings or events where overnight stays are necessary.

Approver - refers to the person with the authority to approve expense claims submitted under this policy (refer to approval authority section)

Authorized External Event - refers to any meeting or event not organized or hosted by PEO and for which prior approval for attendance on PEO's behalf has been provided by the CEO/Registrar , including but not limited to Engineers Canada meetings or events or those of Engineers Canada's constituent members; OSPE events, ACEC-Ontario events, or other events for which prior approval to attend on PEO's behalf has been given.

Chapter Executive - refers to any sitting member of the executive of any of PEO's chapters.

Claimant - refers to any person making an expense claim under this policy.

Councillor - refers to any elected or appointed current member of PEO Council.

Meals – refers to restaurant meals required only while travelling to and from or during approved attendance at PEO meetings or events where the meal is not already provided by the event host. Meals includes take-out meals, or food from either a restaurant or a store that provides ready-to-eat foods. Supplies purchased that are not considered ready-to-eat or are considered for ordinary household use are not eligible as meals and are not reimbursable.

PEO Meeting or Event - refers to any event or meeting hosted or organized by PEO, including PEO Council, committees/task forces meetings, hearings or training sessions, conferences or workshops.

Travel – refers to direct travel by car, train, bus or airplane to and from the home or work location of a PEO Councillor, volunteer or staff member for approved attendance at a PEO event or Authorized External Event.

Volunteer – refers to any volunteer who is currently a member of Council (i.e. Councillor), a PEO committee, task force, working group or chapter executive who is duly elected or appointed and who is not an employee of PEO.

5 Policy Statement

PEO will reimburse its Councillors, volunteers and staff for all reasonable expenses on travel, accommodation, meal and other miscellaneous expenses incurred while conducting PEO business.

6 Allowable Expenses

Expenses for attendance at defined PEO meetings or events, including Authorized External Events, shall be reimbursed as follows:

Travel: All reasonable expenses for travel shall be reimbursed in accordance with Appendix A.

Accommodation: All reasonable expenses for accommodation shall be reimbursed in accordance with Appendix B.

Meals: All reasonable expenses for meals that are not embedded in transportation costs or provided by the event host shall be reimbursed in accordance with Appendix C.

Other/Miscellaneous: Other reasonable expenses for goods and services related to attendance at meetings or events shall be reimbursed in accordance with Appendix D.

Expenses for Authorized External Meetings or Events: Authorization for expenses for attendance at authorized external events must be obtained prior to attending the event.

7 Approval Authority

Approvers are permitted to provide approval only for expenses incurred to conduct PEO business and only for claims that include all appropriate information and supporting documentation.

Approvers will ensure that all charges/expenses are reasonable and within the guidelines of this policy.

Approvers cannot approve their own expenses.

Event approval: Expenses will be reimbursed for attendance at PEO events provided attendance at such events is in accordance with the Attendance at PEO Meetings and Events Policy. Approval of expenses for attendance at Authorized External Events must be obtained from the appropriate approver (see below) prior to attending the event. Such approval is subject to the availability of funds budgeted for this purpose.

Staff expense approval: Expenses must be submitted to the concerned PEO manager or designate for approval.

Volunteers and Councillors: Expenses must be submitted to the concerned staff or committee advisor for approval. Committee advisors will assist volunteers to complete the expense report when necessary.

CEO/Registrar: Expenses are to be approved by the Senior Director, Finance.

A summary of the President's, Council Chair's and CEO/Registrar's expenses is to be provided to the Audit and Finance Committee in-camera at minimum on a semi-annual basis.

8 Submission Of Expenses

Supporting Documentation:

- All appropriate approvals must be obtained before incurring expenses; if no prior approval was obtained, a written explanation indicating why approval was not obtained prior to incurring the expense must be submitted with the claim;
- All original, itemized receipts must be submitted with all claims (credit card statements are not sufficient). When submitting an expense claim electronically, an electronic copy of receipts in Portable Document Format (PDF) is acceptable. It is recommended that original receipts be kept until reimbursement is received.
- If there is no itemized receipt accompanying an expense claim, or the itemized receipt does not include items such as tips and gratuities, a written explanation itemizing the expense along with the reason for the missing receipt/s must be submitted

Submission Process:

- All expense claims must be submitted using the web-based online travel and expense solution Emburse Certify.

Submission Process:

- Expense claims must be submitted within two (2) months of incurring the expense. Claims submitted more than two (2) months after the expense was incurred may only be approved under exceptional circumstances.
- All expenses incurred after October 15 must be submitted no later than January 15th of the following year to meet year-end deadlines. PEO cannot process any expense claims submitted after January 15 for expenses incurred in the previous year.

9 Non-Reimbursable Expenses

Non-reimbursable expenses include but are not limited to:

- Clothing and formal wear
- Personal mobile telephone plans, home telephone plans, or home internet plans
- Air travel insurance coverage
- Entertainment expenses
- Hotel room mini-bar
- Spa charges
- Laundry services except as outlined in Appendix D.
- In-room movies or games
- Personal items (e.g. toothbrush, cosmetics, medication, mouthwash, etc.)
- Personal provisions (e.g. stationery)
- Alcohol or gift cards to purchase alcohol
- Parking or traffic infractions
- Fines and penalties
- Pet care
- Personal professional services
- Prepaid debit/credit cards and other cash equivalents
- Donations to political or religious entities or organizations, etc.
- Other exclusions as listed in this policy and its appendices.

10 Exceptions And Appeal Procedures

See Appendix E. Claims for expenses that are submitted after the set deadlines or are exceptions to, or are outside of this policy, are to be submitted for review and final decision in accordance with Appendix E. Decisions resulting from the appeals process are final.

11 Relevant Policies and Procedures

The Expense Reimbursement Policy is a component of PEO's Internal Control Policies and Procedures.

12 Responsibility

The PEO Finance Department has responsibility for the administration, implementation and communication of all Internal Control Policies including the Expense Reimbursement Policy. All PEO volunteers and PEO staff should be aware of and comply with the policy.

13 Acknowledgement and Agreement

I, (employee name), acknowledge that I have read and understand the **Expense Reimbursement** Policy of Professional Engineers Ontario. I agree to adhere to this policy and will ensure to promote compliance. I understand that if I do not adhere to the principles of this policy, I may face disciplinary action up to and including termination of employment.

Name: ________________________

Signature: ________________________

Date: ________________________

14 Appendix A: Travel Expense Reimbursement

Travel arrangements shall be made well ahead of time, using the most cost-effective mode of transportation.

Air travel

Air travel is permitted if it is the most practical and economical way to travel. Economy (coach) class is the standard option for airline ticket purchase.

Travel by other than economy class must have the prior approval of the CEO/Registrar, or their designate, and may be considered only for flights of a duration of more than four consecutive hours.

Individual lounge passes are reimbursable for flights exceeding 4 hours of flying time, or with prior approval of the CEO/Registrar.

Reasonable luggage fees, such as 1x check-in bag and 1x carry-on bag are reimbursable.

Travellers must book refundable/changeable fares.

Travelers must book as early as possible to secure an economical travel fare.

Any cancellation fees or penalties resulting in no-shows or failure to cancel travel arrangements are the claimant’s responsibility and will not be reimbursed, except in cases of emergencies.

Train or Bus travel

Travel by train or bus is permitted when it is the most practical and economic way to travel. Business class tickets for train travel are permitted.

Reasonable luggage fees, such as 1x check-in bag and 1x carry-on bag are reimbursable.

Travellers must book refundable/changeable fares.

Travelers must book as early as possible to secure an economical travel fare.

Any cancellation fees or penalties resulting in no-shows or failure to cancel travel arrangements are the claimant’s responsibility and will not be reimbursed, except in cases of emergencies.

Automobile travel

PEO will reimburse expenses incurred using a personal vehicle only by paying the rate per kilometer ("kilometric rate" - see below) in effect at the time of the travel.

When road transportation is the most practical, economical way to travel, the order of preference is:

1. Personal vehicle
   - It is the responsibility of the owner/user of the personal vehicle to carry relevant vehicular insurance and to comply with prevailing vehicle-related laws.
   - PEO will not reimburse any personal vehicle maintenance or repair costs.
   - Gas usage for personal vehicles shall not be reimbursed.

2. Rental vehicle:
   - A rental vehicle may be justified to travel to and from a PEO event only, and where it is more economical than other travel options.
   - Use of mid-sized models or smaller is encouraged.
   - Luxury and sports vehicles are prohibited unless available for the same price as normal vehicles
   - Any exceptions to the above should be documented prior to the rental if possible; and guided by the principle that the rental vehicle chosen is the most economical and practical size, taking into account the business purpose, number of occupants and safety (including weather) conditions.
   - Rental cars must be refueled before returning the car to the rental company. PEO will reimburse such refueling charges.
   - Penalties or extra charges incurred for returning an unrefueled car shall not be reimbursed.
   - Travellers must book refundable/changeable rental car arrangements. Cancellation fees or penalties for no-shows or failure to cancel are the claimant's responsibility and will not be reimbursed, except in cases of emergencies.
   - All PEO volunteers and staff are covered for bodily injury under PEO's travel accident insurance when travelling for PEO-related purposes. The purchase of motor vehicle liability insurance for rental vehicles will be reimbursed.

Vehicle Accident reporting:

- All accidents must be reported immediately to local law enforcement authorities and, in the case of staff, to the immediate supervisor.
- In the case of a rental vehicle, advise the rental car agency and contact the motor vehicle liability insurance provider to initiate the claims process.

Kilometric rate:

- Kilometric rate will be reimbursed at the rates published in the Government of Canada's publication on the applicable year's income tax deduction limits and expense benefit rates, and as subsequently approved and published by PEO.
- PEO does not pay mileage rates for rental vehicles. PEO will only pay mileage rates when the actual method of travel involved a personal vehicle.
- Expense claims must be submitted with distances indicated in kilometers.
- PEO may, from time to time, request proof of kilometers (distance) travelled. Accepted supporting documentation to support proof of distance can include extracts from Google Maps or Apple Maps.
- Excessive distances will require explanation to be reimbursable. Excessive distances without acceptable explanations or excessive distances that result in automobile travel not being the most cost-effective method of transportation will not be reimbursed.

Parking and Tolls

- Reimbursement is provided for necessary and reasonable expenditures on parking, as well as tolls for bridges, ferries, and highways, when necessary.
- Parking and toll claims will be reimbursed when accompanied by original receipts. Costs for leasing Hwy 407 or other paid toll transponders will not be reimbursed.
- There is no reimbursement for traffic or parking violations or related legal fees.

Taxis and Rideshares

- Taxi or rideshare service (eg. Uber/Lyft) usage for travel between home and the airport; and between the airport and hotel is permitted.
- For PEO Staff, taxis or rideshare services may not be used to commute between home and PEO, except under exceptional circumstances; for instance:
    - health or safety considerations indicate it is the best, appropriate option; or
    - transport of work-related assets or inventory; or

- CEO/Registrar pre-approval.

Public Transit

- Local public transportation, including local buses (TTC, YRT, GO, etc), local and commuter trains (TTC, GO, etc), and event or hotel/airport shuttles, should be used whenever possible. Itemized receipts are not required.
- Itemized receipts are required for national trains (Via Rail, Amtrak, etc.)
- Public transit fares are reimbursable when travelling on PEO business in lieu of mileage. Public transit passes (ie. monthly or annual passes) are not reimbursable.

15 Appendix B: Accommodation Expense Reimbursement

Hotel Accommodation

PEO will reimburse expenses for hotel accommodations only up to the preferred rate at the hotel designated for the meeting or event. Where identified by PEO meeting organizers or authorized external event organizations, claimants should book accommodations at hotels with preferred rates or event rates.

Accommodations should be booked using rate classes that allow for fully refundable cancellations or changes.

Any cancellation fees or penalties resulting from no-shows or failure to cancel accommodations arrangements are the claimant's responsibility and will not be reimbursed, except in cases of emergencies.

Reasonable accommodation incidentals, such as long-distance calls within Canada, internet fees, business centre access fees, costs to conduct urgent PEO business such as printing/fax charges will be reimbursed when supported by itemized receipts.

Reasonable laundry/dry cleaning charges are reimbursable with accommodations of 4 or more consecutive nights when supported by itemized receipts.

Reasonable gratuities for hotel porters and hotel room services are reimbursable. Itemized receipts are not required, but a note from the claimant on gratuities paid should be included on documentation submitted alongside accommodation receipts (ie. Hotel invoice).

Other Accommodation

Volunteers or staff travelling on PEO business may stay at a family member or friend's place. In such cases, a nominal amount of up to $75 per day may be claimed for payment to the host of the traveller.

Supporting documentation for these claims can include a document containing the name of the host, the address, and the dates of stay to facilitate reimbursement to the claimant.

16 Appendix C: Meals Expense Reimbursement

Meals

Only meals that are necessitated by travel schedule will be reimbursed. When more than one meal is claimed for in a day, the maximum can be allocated between all reimbursable meals regardless of what is spent on each meal.

For meal expenses that are submitted with original itemized receipts, the following daily maximum limits which include taxes and gratuities apply:

- Breakfast $25.00 per person
- Lunch $35.00 per person
- Dinner $55.00 per person

Expenses exceeding these limits will not be reimbursed except in exceptional circumstances when expressly pre-approved by the CEO/Registrar.

For meal expenses that include more than one attendee, such as those for events, the names of each attendee must be provided alongside the itemized receipts. For larger events with planned attendance of greater than twenty (20) individuals, a summary of the roles or a general description of the invitees is acceptable in lieu of an attendance listing.

Reimbursement will not be provided for meals consumed when included in the cost of transportation, accommodation, seminars or conferences.

Meal expenses that are missing itemized receipts may be reimbursed and will be subject to the following daily maximum limits which include taxes and gratuity:

- Breakfast $10.00 per person
- Lunch $15.00 per person
- Dinner $20.00 per person

Reimbursement requests for meal expenses missing itemized receipts should reflect actual expenses incurred. Claimants must include the restaurant/store name and a note indicating that the itemized receipt is missing.

En-route meals will only be reimbursed as is necessitated by the travel schedule where an individual resides beyond a 100 km radius from the destination/event.

Meals eaten in lieu of event group meals are not eligible for reimbursement.

Alcohol

Alcohol is not a reimbursable expense. In general, alcohol is not served at events hosted by PEO such as Council meetings, AGMs, Council workshop, etc.

Alcohol as part of a meal is only reimbursable in exceptional circumstances with prior approval of the CEO/Registrar.

CEO/Registrar may provide prior approval of the serving of alcohol at PEO events in exceptional circumstances, such as designated special events, or when appropriate for the purpose of hosting and entertaining others in connection with PEO business.

In any such cases where alcohol is exceptionally approved, a limit of two alcoholic beverages per person applies unless expressly noted during pre-approval, and should be accompanied by food.

17 Appendix D: Other/Miscellaneous Expense Reimbursement

Childcare or care giver expenses

Reasonable childcare or caregiver expenses for volunteers shall be reimbursed up to a limit of $1,500 per year.

Entertainment

If it is necessary and desirable for a PEO President, Council Chair or CEO/Registrar to host and entertain others in connection with PEO business, PEO will reimburse expenses directly incurred, provided all items are appropriately claimed with an accompanying itemized receipt and the expenses are made with reasonable discretion.

In all instances of hosting, the names and affiliations or titles of all attendees must be included in the expense claim, together with a statement on the purpose of the hosting activity.

Partner Expenses

Where partners have been invited by the PEO President, Council Chair or CEO/Registrar to attend a PEO meeting or event or authorized external event, PEO will pay reasonable travel and other expenses, in accordance with this policy, for partners of Councillors, volunteers and staff, and invited guests of the President, Council Chair or of the CEO/Registrar. Unless partners are expressly invited, their expenses will not be covered.

Reasonable in-hotel childcare services will be reimbursed for events where partners have been invited excluding the AGM events and Chapter Leaders Conference.

PEO will not reimburse travel, meal or accommodation expenses for any additional guests.

18 Appendix E: Expense Claim Appeals Procedures

Any staff or volunteer denied a claim for reimbursement for expenses, may email a submission to the CEO/Registrar within 20 days of the notification of denial of the claim, outlining the grounds for appeal. A copy of the denied expense report must be attached.

The CEO/Registrar will review the expense claim and provide a decision within 5-7 days of receiving the appeal.

The decision of the CEO/Registrar is final and binding.

The CEO/Registrar's, the President's, and the Council Chair's claims that are denied may be adjudicated by the Chair of the Audit and Finance Committee, or a designated representative appointed by the Chair of AFC, whose decision is final and binding.

Appeals shall not prevent a partial payment upon request for items that are in compliance with the policy.