

ONTARIO COMMAND EXPENSE ACCOUNT POLICY

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SECTION A

GENERAL INFORMATION

The Expense Account Policy is an Ontario Command document established to determine expenses that will be compensated to various individuals in the performance of their duties as directed through their various responsibilities. The following procedures are to be followed regarding such expenses.

1. Expenses are to be submitted monthly and/or within **sixty (60) days** following the end of the month in which the expense is incurred; otherwise, they will not be honoured.
2. **All expenses incurred prior to May 31st in any year must be submitted to Provincial Headquarters for payment, no later than June 15th each year.**
3. There are only two expense account forms on the Ontario Command website at www.on.legion.ca under Member Resources. Submit only the **most current** forms.
4. **The Out-of-Pocket Expense Form** is used for claiming expenses. **The Per Diem Voucher** (Per Diem rate currently \$185.00 per day, unless otherwise stated (\$115.00 for rooms and \$70.00 for meals)) is only used when sent out by Provincial Headquarters for specific meetings, Provincial and Dominion Conventions.
5. Both forms must record the date the form was completed, the date that the travel occurred, the Office that you hold with respect to that travel, the purpose of the travel, the kilometres travelled, etc. Receipts must be submitted for air, train, taxi or bus fares, accommodation, postage, (only when applicable) etc. Any claim submitted without the required information will be returned. Please note **all expense forms must be signed.**
6. The Ontario Command Expense Account Policy does not provide for the payment of expenses incurred by any Officer or Standing Committee Chair that **extends beyond the term of office.**
7. Reasonable meal receipts and hotel receipts must accompany an **Out-of-Pocket Expense Form. Alcohol and tips / gratuity are not reimbursable expenses.**
8. Any member of the District or Zone, or member of a Provincial Standing Committee residing outside of the District or Zone, will be permitted **mileage from their resident Branch** (not from one's place of residence) for travel within the District or Zone in carrying out the duties and responsibilities of their office.
9. If a **Per Diem Voucher** has been submitted for any meeting that **you were unable to attend**, all funds must be made payable to Ontario Command and returned to Provincial Headquarters within 14 days of said meeting.
10. Any expenses not covered in this policy will be the responsibility of the District, Zone or Individual.
11. All expenses must be submitted to Provincial Headquarters on the **Out-of-Pocket Expense Form** or **Per Diem Voucher**. Any District, Zone or individually fabricated form will be returned to the individual for resubmission on the proper form.
12. When in doubt – ask your Chain of Command before incurring any expenses.

SECTION B

PER DIEM VOUCHER

1. The Per Diem rate (currently \$185.00 per day), includes accommodation and meal costs, (\$115.00 for rooms and \$70.00 for meals, unless otherwise stated) and is paid to all members of the

Provincial Executive Council to attend PEC (held in November on the weekend following November 11th. When November 11th is close to or on the weekend, the PEC meeting moves to the following weekend), Provincial Standing Committee meetings, Provincial and Dominion Conventions.

2. Two days Per Diem is paid for attending all PEC events during the PEC weekend.
3. When hotel accommodations are not required, ***mileage and reasonable meal expenses may be paid. (alcohol or tips not included)***
4. Senior Elected Officers, PEC members, Standing Committee Chairs, and Committee members who reside 600 km or more (one way) may be permitted additional expenses (if required with prior approval by Provincial Headquarters). The additional expense shall be made on an **Out-of-Pocket Expense Form** accompanied by the hotel receipt and reasonable meal receipts (**alcohol or tips not included**). This clause does not apply to Provincial and Dominion Conventions.
5. In extenuating circumstances such as storms, freezing rain, etc., you may be reimbursed should a stop over be necessary and approved by Provincial Headquarters. This claim will be submitted on an **Out-of-Pocket Expense Form** accompanied by the hotel receipt and reasonable meal receipts (**alcohol or tips not included**).
6. For Dominion and Provincial Conventions, PEC members may claim reasonable accommodation costs in excess of \$115.00 per day (hospitality suites excluded) on an **Out-Of-Pocket Expense Form**. All other expenses not covered under District/Deputy District, Zone Commander sections shall be at the cost of the District or Zone. The **Provincial** President reserves the right to put a ceiling on such additional cost.

SECTION C

OUT-OF-POCKET EXPENSE FORMS

1. Mileage is at the Ontario Command rate of \$0.70 cents per kilometre (temporarily). Local bus or taxi fare must include a receipt. Air, train, long distance bus travel must be approved by Provincial Headquarters in advance of travel.
2. If the Officer resides within 50 km, (one way) hotel accommodation may not be claimed other than, PAC meetings, Provincial and Dominion Conventions. Should extenuating circumstances apply prior approval may be granted from Provincial Headquarters. Meal expenses must be reasonable. (**alcohol or tips not included**) **NOTE: Spouse's meal is not included.**
3. Senior Elected Officers, PEC members, Standing Committee Chairs, and Committee members who reside 600 km or more (one way) may be permitted additional expenses (if required and approved in advance by Provincial Headquarters). The additional expense shall be made on an **Out-of-Pocket Expense Form** accompanied by the hotel receipt. This clause does not apply to Provincial and Dominion Conventions.
4. As most documents are sent electronically, reasonable postage may be paid however this does not include the cost of an all-Branch mailing or wide distribution throughout the District or Zone.
5. As most documents are sent electronically, photocopying costs will be limited. The cost of multiple copies for attendees at a seminar or convention will be an expense to the District or Zone.
6. The Date of the Visit including Branch number and name along with the nature of the visit should be included on the Out of Pocket Expense Form.

SECTION D

SENIOR ELECTED OFFICER EXPENSES

1. Expenses will be reimbursed to SEO's in the performance of their duties and any additional duties as assigned to them by the Provincial President. Also see Section C.
2. A **Per Diem Voucher** will be honoured for the March and August Finance Committee, PAC and PEC meetings, the December joint LADIES' AUXILIARY meeting and Provincial and Dominion Conventions.
3. The SEO invited to attend a District Convention (as the Ontario Command representative) and SEO's attending their own District Conventions (but not District Council meetings) will be reimbursed reasonable Out-of-Pocket expenses.
4. Invitations for an SEO to attend a Branch, with prior approval from the Provincial President will be reimbursed reasonable out of pocket expenses.
5. 60% of consumables such as black ink cartridges will be reimbursed on an **Out-of-Pocket Expense Form**.
6. Officers who are members of Dominion Executive Council are reimbursed for Dominion events (DEC, Dominion Standing Committees and Dominion Convention) by Dominion Command. Those members not reimbursed in accordance with Ontario Command Policy will be reimbursed any difference by Provincial Headquarters.
7. The Provincial President's expenses to attend other Provincial Conventions are not to exceed \$3,750 each year of the term of office.
8. The expense account policy provides for the Provincial President (or their officially designated representative) to attend a memorial service for a member of PEC, there is no reimbursement of expenses for any other PEC member to attend.
9. Per Diem is paid for the President and 1st Vice President to attend LA conventions and the biennial Provincial Service Officers' conference, held at the Provincial Headquarters.
10. Per Diem is paid to the SEO when attending PAC, PEC, Provincial Standing Committee meetings, Provincial and Dominion and the annual joint meeting with the Ladies Auxiliary.

SECTION E

DISTRICT COMMANDER EXPENSES

1. District Commanders are reimbursed for travel expenses in the pursuit of their duties and within the areas that are under their jurisdiction from **point of residence**, all other travel outside their District must have prior approval from Provincial Headquarters. The only Officers authorized to represent a District Commander is the Deputy District Commander(s) respectively. Also see Section C.
2. May receive 5 days Per Diem, plus travel allowance and registration to attend Dominion Convention.
3. May receive 4 ½ days Per Diem plus mileage and registration fee for Provincial Convention.
4. May claim expenses to attend their own District Conventions
5. May claim expenses to attend a meeting to organize their own District Convention. (One claim per convention).

6. May claim a maximum of two (2) District Council meetings annually, **that are one day only**, at Ontario Command expense, to be held in conjunction with or prior to the District Convention (a Council meeting shall be permitted subsequent to the Provincial Convention).
7. Are allowed 1 visit per year to other Districts during a term in office at Ontario Command expense for a maximum of three visits during a three-year term in office. (By invitation extended through Provincial Headquarters).
8. May claim expenses to attend seminars in their area. The subject/seminar may only be claimed once.
9. May attend Zone Drumhead Service (within their own District).
10. May attend a **National** Track and Field meet within their own District with prior approval from Provincial Headquarters.
11. District Commanders may attend two District Sports events each year during a term in office at Ontario Command expense.
12. District Commanders must verify expenses and sign the **Out-of-Pocket Expense Form** prior to sending to Provincial Headquarters for reimbursement. Incomplete forms will be returned.
13. Non-Legion functions will not be honoured unless prior permission has been granted from Provincial Headquarters.
14. District Commanders must obtain prior approval from Provincial Headquarters to accept an invitation to a Ladies Auxiliary function (one LA function at Ontario Command expense during the term of office).
15. The Expense Account Policy does not provide the authority for payment of expenses to District Commanders or their representatives to attend area public speaking finals outside of their respective Districts. This is the responsibility of the Youth Education District Chairs only.
16. District Commanders are not authorized to attend District Bursary meetings at Ontario Command expense.
17. When a Dominion sporting event is hosted by a Branch in Ontario, all arrangements are the responsibility of Dominion Command. Any expense associated by a District Officer is an expense of the District. The Provincial President or designate will be the official representative of Ontario Command.
18. Expenses for District **Officers** are an expense to the District in question.
19. Any District **Officer** attending a meeting to plan and organize a District Convention, *will be a District expense*. This responsibility lies with the District Commander.
20. Registration fees to a Dominion or Provincial Convention are restricted to the District Commander.

SECTION E

ZONE COMMANDER EXPENSES

1. Zone Commanders are compensated for travel expenses in the pursuit of their duties and within the areas that are under their jurisdiction from point of residence. The only Officers authorized to represent a Zone Commander is the Deputy Zone Commander(s) respectively. Also see Section C.
2. May receive 5 days Per Diem plus registration to attend a Dominion Conventions.
3. May receive 4 ½ days Per Diem plus mileage and registration for a Provincial Convention.
4. Alternates are not permitted unless prior approval from Provincial Headquarters due to extenuating circumstances.

5. May claim expenses to attend seminars in their area. The subject/seminar may only be claimed once.
6. May claim a maximum of two (2) Zone Council meetings to be held annually in conjunction with Zone Conventions.
7. Is restricted to three (3) visits per year to any Branch within the Zone (One (1) visit - Annual Inspection, one (1) visit for elections or installations of Officers and One (1) additional visit for a social functions i.e., Branch Anniversaries, Honours and Awards, Legion Week, Remembrance Day Ceremonies and Banquets. The **Out-of-Pocket Expense Form** must be completed, signed and a copy of the original invitation attached and forwarded to your District Commander for verification and signature. Provincial Headquarters may approve additional visits to a Branch if warranted.
8. May claim expenses to attend District Conventions and District Council Meetings.
9. Non-Legion functions will not be honoured unless prior permission has been granted from Provincial Headquarters.
10. Zone Commanders must obtain prior approval from Provincial Headquarters to accept an invitation to a Ladies Auxiliary function (one (1) LA function at Ontario Command expense during the term of office).
11. When a Dominion sporting event is hosted by a Branch in Ontario, all arrangements are the responsibility of Dominion Command. Any expense associated with a Zone Officer is an expense of the Zone. The Provincial President or designate will be the official representative of Ontario Command.
12. Expenses for Zone **Officers** are an expense to the Zone in question.
13. Zone **Officers** attending a meeting to plan and or organize a Zone Convention, *will be a Zone expense*. This responsibility lies with the Zone Commander.
14. Branch functions are the responsibility of the Branch and do not require a visit from a Zone Commander for organizational purposes.

SECTION G

DEPUTY DISTRICT AND DEPUTY ZONE COMMANDERS' EXPENSES

1. Deputy District Commanders may receive 5 days Per Diem, plus travel allowance and registration to attend a Dominion Convention.
2. Deputy District Commanders may receive 4 ½ days Per Diem plus mileage and registration fee to attend Provincial Conventions.
3. Deputy District Commanders are authorized to attend their own District Conventions and Council Meetings at Ontario Command expense.
4. Deputy District Commanders are authorized to attend seminars in their area. The subject/seminar may only be claimed once.
5. The expenses of a **Deputy Commander** to attend a function that is also attended by the District/Zone Commander are an expense to the **District or Zone**.
6. Deputy Commanders are entitled to expenses from Ontario Command when **deputized** by their respective District or Zone Commanders. The District or Zone Commander must be unable to attend the function on that date. A Deputy District Commander or Deputy Zone Commander may be deputized to attend the following:
 - a) Branch Anniversary Celebrations commencing with the 10th year and at 5-year intervals thereafter.

- b) Presentation of Branch Charters.
- c) Official Opening Ceremonies of new Branch property.
- d) Mortgage Burning Ceremonies.
- e) Legion Week Celebrations.
- f) Events of historical interest or local celebration in which the Legion Branch plays an integral part.
- g) November 11th celebrations, parades, etc.
- h) Zone Conventions or Zone Council Meetings.
- i) In extenuating circumstances, **and subject to prior approval by Provincial Headquarters** a Deputy Zone Commander may attend a Dominion or Provincial Convention when the Zone Commander is unable. The Deputy would receive the same expenses as the Zone Commander.

Although prior approval from Provincial Headquarters will not be required in most instances to be deputized, a copy of the original invitation to the District/Zone Commander to attend the Branch function must be included with the completed **Out-of-Pocket Expense Form**, signed, and forwarded to your respective District or Zone Commander for verification and signature.

SECTION H

PROVINCIAL COMMITTEE CHAIRS AND DISTRICT REPRESENTATIVES ON PROVINCIAL COMMITTEES:

1. Provincial Standing Committee Chairs and District Representatives on Provincial Committees may claim expenses to attend their Committee meetings at Provincial Headquarters. The invitation is sent including a **Per Diem Voucher** from the Provincial Headquarters which is to be completed, signed and returned to the Provincial Headquarters. No need for the District Commander's signature.
2. District representative on a Provincial Standing Committee who **are required** to attend a **District Council/Convention** to give a report may be reimbursed reasonable expenses when an **Out-of-Pocket Expense Form** is completed, signed forwarded to District Commander who will verify and sign before forwarding to Provincial Headquarters. **A copy of the report you are presenting at District Council/Convention must be forwarded to the Provincial Standing Committee Chair in advance of the Council/Convention date.**
3. A District representative when required to visit a Branch **with a specific purpose** may be reimbursed reasonable expenses when **authorized by the District Commander in conjunction with Provincial Headquarters. An Out-of-Pocket Expense Form** must be completed, signed and forwarded to the District Commander for verification and signed before forwarding to Provincial Headquarters for reimbursement.
4. District representatives on Provincial Committees will not be reimbursed by Provincial Headquarters to attend a Zone Convention/Council meeting.
5. A District Representative on the Provincial Youth Education Committee may be paid reasonable out-of-pocket expenses, from Ontario Command, when attending a special awards presentation to the winners of the **Dominion Poster & Literary Contest**. Presentation to winners of the Provincial Poster & Literary Contest at the Branch, Zone or District Level is an expense to the Branch, Zone or District.
6. District Standing Committee Chairs may be reimbursed reasonable out of pocket expenses if they are the guest speaker at a banquet with prior approval from Provincial Headquarters.
7. District H&A, C&L and Resolution Chairs are an expense to the District.

8. District Representatives on a Provincial Standing Committee may be reimbursed reasonable out of pocket expenses for conducting their annual seminars at Zone or District level. **The Out-of-Pocket Expense Form** must be completed, signed and forwarded to the District Commander to verify and sign before forwarding to Provincial Headquarters.

SECTION J

GUEST SPEAKERS FOR DISTRICT CONVENTIONS

1. District Commanders may submit an official invitation for a Senior Elected Officer (The Provincial President, Immediate Past President, 1st Vice-President, three Vice-Presidents, Honorary Treasurer, Chair and Vice-Chair) to be the main speaker at a District Convention. The expenses of **the** Senior Elected Officer may be covered by Ontario Command.
2. Invitations must be submitted on the **Request for Visit by Command Officer Form**, as noted in the Visitation Policy in section "O" of the current Officer's Manual. This form is found on the Ontario Command website (www.on.legion.ca) under Forms & Manuals, Committee Forms.

SECTION K

CHARITABLE FOUNDATION AND BURSARY COMMITTEE

1. Charitable Foundation expenses may only be authorized by the Corporation. **Out-of-Pocket Expense Forms** and **Per Diem Vouchers** are sent to the CF President for approval.
2. Members of the CF sub-committee receive one day's Per Diem and mileage to attend the sub-committee meeting in June. The full Board of Directors receives 2 days Per Diem and mileage to attend the November CF Meeting and Annual meeting on the Saturday of PEC.
3. The Expense Account Policy will permit payment of expenses to the Board Directors of the Charitable Foundation when in attendance at District Conventions and District Council meetings, **for the purpose of presenting their reports and promoting the activities of the Foundation**. CF Directors are not members of their District Council by virtue of their appointment to the Foundation and are not entitled to attend Zone Conventions etc., without the **prior approval of the Foundation**. Districts do not have the authority to incur expenses against the Foundation.
4. Members of the Bursary Committee receive one day's Per Diem and mileage to attend the Bursary meeting at the Command Headquarters in June.
5. The expenses of members of the Provincial Bursary Committee when carrying out the duties of their office are an expense to the Charitable Foundation (Bursary).

SECTION L

DISTRICT BRANCH ADVISORS AND BOARD OF TRUSTEES

1. Once a District has made a request for a District Branch Advisor through Provincial Headquarters and the District has received approval, reasonable expenses incurred by the DBA will covered by Ontario Command. **An Out-of-Pocket Expense Form** shall be completed, signed and forwarded to the District Commander for verification and signing before forwarding to Provincial Headquarters. If

overnight accommodations are required receipts for same must be attached. Mileage shall be paid at the Command rate of \$0.70 KM (temporarily).

2. **The Chair of a District Branch Advisory Committee** shall be reimbursed by Ontario Command to attend District Conventions and Zone Convention/Council Meetings.
3. **One member of a Branch Board of Trustees** shall be reimbursed by Ontario Command to attend the District Conventions and Zone/Council Meetings.
4. When the Provincial President has implemented a Board of Trustees in a Branch expenses of the **BOT Chair** may be reimbursed by completing an **Out-of-Pocket Expense Form** signing and forwarding directly to Provincial Headquarters. **This must be accompanied with a written report.** Other BOT members may be reimbursed reasonable expenses by completing the **Out-of-Pocket Expense Form** signing and forwarding to the **BOT Chair** for verification and signing before forwarding to Provincial Headquarters. Should overnight accommodations be required receipts for same must be attached. Mileage shall be reimbursed at the Ontario Command rate of \$0.70 km (temporarily).

SECTION M

MISCELLANEOUS

1. Standing Committee Chairs at District Level (Poppy, Sports, Membership, Track and Field, Public Relations, Leadership Development, Youth Education, Veterans Services/ Legion Senior Programs) may be reimbursed reasonable expenses in carrying out the duties of their office as per the Committee's Terms of Reference. An **Out-of-Pocket Expense Form** must be completed and signed before forwarding to the District Commander for verification and signing before forwarding to Provincial Headquarters. If overnight accommodations are required, receipts for same must be attached. Mileage is reimbursed at the Ontario Command rate of \$0.70 km (temporarily).
2. Ontario Command **does not reimburse** District Sports Officers to convene District Sports Events.
3. All Command Officers, Chairs of Provincial Standing Committees, and the Special Section Representative being a Member of a Branch within the District **shall be reimbursed reasonable out of pocket expenses** to attend their respective **District Council meeting or District Convention.**
4. Ontario Command will not reimburse any Provincial Committee Chairs, past District/Zone Commanders, District representatives on Provincial Committees, or District or Zone Officers invited to Branch Installation ceremonies, Branch Openings, Honours and Awards functions or speaking engagements on behalf of the District or Zone Commander. **These are an expense of the District or Zone.**
5. The Provincial Representative attending Provincial Sports Competitions, at the request of the Provincial President, will be reimbursed reasonable out of pocket expenses.
6. Provincial Standalone Positions, as defined in The General By-Laws of the Ontario Provincial Command (GBLO), will be reimbursed reasonable expenses to attend PEC, Provincial and Dominion Conventions.