



REIMBURSEMENT POLICY 2018-2019



ExCO Reimbursement Policy at a Glance

	Local	Domestic	United States	International
Flight and Expenses and Delegate Fees	50%, to a maximum of \$100.	50%, to a maximum of \$350.	50%, to a maximum of \$500.	50%, to a maximum of \$750.
Local Transportation Allowances	Flat rate of \$20.			
Accommodation	50%, to a maximum of \$50 per day.			
Food, Entertainment, and Other Expenses	None.			

Notes:

- (a) “Conference Fee” is defined as Delegate Fee.
- (b) Breakdowns of conference fees may be requested to determine eligibility of reimbursement.

**Please be advised that by submitting an application for an external conference through ExCO, you are agreeing and consenting to these terms and conditions.



Reimbursement Policy

This policy is for ExCO delegates and will cover the following areas:

- 1) **Purpose and Scope**
- 2) **Eligibility for External Conference Subsidies**
- 3) **External Conference Categories**
- 4) **Pre-Departure Procedures**
- 5) **Subsidy Limitations**
- 6) **Subsidy Estimation and Reimbursement Process**
- 7) **Conference Attendance**
- 8) **Post-Arrival Procedures**
- 9) **Reimbursement Policy Clarifications**

1) **Purpose and Scope**

- A. In an effort to expand the scope of the Bachelor of Commerce program at the Sauder School of Business, the Society shall provide funding for students to travel to conferences and competitions beyond the local community.
- B. An “external conference” shall be a value-added conference, competition or event a student may attend that is not operated by the Society or by any subsidiary organization of the Alma Mater Society. Priority will be given to conferences and competitions, and the final judgement of what constitutes as a “value added external conference” will be decided by the Co-Directors.

2) **Eligibility for External Conference Subsidies**

- A. Any member of the Commerce Undergraduate Society shall be eligible to apply to receive an external conference subsidy.
 - I. A standard application and evaluation process shall be used to evaluate applications and shall be administered by the External Conferences Co-Directors,



who may also maintain such other policies and procedures as are necessary to facilitate this policy.

- II. Only those students confirmed by the Society to have successfully been granted a subsidy shall be eligible to receive one.
- B. Each delegate is committed to attend all sessions of the respective conference he/she is participating in and represent Sauder and UBC in a professional and respectful manner.
- C. If the delegate does not attend the majority of the conference in the manner as stated in Sub-Section B, then ExCO can withhold his/her reimbursement indefinitely.

3) External Conference Categories

- A. All external conferences shall be grouped into the following categories based on geographical location of the event:
 - I. "Local conferences", being conferences held within the Lower Mainland area of British Columbia. Vancouver Island and other areas outside of this region will be categorized as "domestic."
 - II. "Domestic conferences", being conferences held within Canada.
 - III. "United States conferences", being conferences held within the United States of America.
 - IV. "International conferences", being conferences held outside of any of the above regions.

4) Pre-Departure Procedures

- A. Delegate is responsible for organizing and paying for their transportation to and from the external conference.
 - I. Flight and expenses encompasses travel expenses directly to the city where the conference is held and includes airfare, ferry fees, transit and train expenses.



- II. Location Transportation Allowance is defined as the amount of money provided for the transportation that a delegate takes when he/she is in the city where the conference is held. Modes of transportation eligible for reimbursement are limited to local public transit systems including bus, Uber (or similar services), subway and sea bus.
 - III. If the delegate is unable to reach the conference destination with these options, the delegate must contact an ExCO committee member and make alternate reimbursement arrangements.
 - IV. Any cancelled tickets will not be eligible for consideration.
- B. Delegate can, at their discretion, extend their travel period for personal or business around the external conference.
- I. Any expenses above and beyond what would have been subsidized as a result of attending an external conference shall not be considered for subsidy.
- C. Prior to departure, the following **MUST** be submitted to the External Conferences Committee:
- I. **Resume**
 - II. **Cover Letter**
 - III. **Signed Terms and Conditions Form**
 - IV. **Application Form**
- D. Applications are accepted until 2 weeks prior to the conference start date, however, applications are approved on a rolling basis. Eligible spots may fill up prior to the 2-week deadline.

5) Subsidy Limitations

- A. Students shall be permitted to receive a **MAXIMUM** number of subsidies as defined below:
- I. No more than one (1) local, domestic, United States, or international conference per fiscal year (April 30 is fiscal year end).



- II. No more than four (4) local conferences over the course of their entire membership in the Society, and a combined total of no more than three (3) domestic, United States, or international conferences over the course of their membership.
- B. Students shall receive subsidies for each conference that they attend and are approved to receive a subsidy for as follows:
- I. Delegate fees and flight and expenses:
 1. Fifty percent (50%) of their combined delegate fees and flight and expenses, excluding first-class tickets, in-flight purchases, luggage fees or other flight expenses beyond base fare associated taxes and fees, for a local conference, to a maximum of \$100.
 2. Fifty percent (50%) of their combined delegate fees and flight and expenses, excluding first-class tickets, in-flight purchases, luggage fees or other flight expenses beyond base fare associated taxes and fees, for a domestic conference, to a maximum of \$350.
 3. Fifty percent (50%) of their combined delegate fees and flight and expenses, excluding first-class tickets, in-flight purchases, luggage fees or other flight expenses beyond base fare associated taxes and fees, for a United States conference, to a maximum of \$500.
 4. Fifty percent (50%) of their combined delegate fees and flight and expenses, excluding first-class tickets, in-flight purchases, luggage fees or other flight expenses beyond base fare associated taxes and fees, for an international conference, to a maximum of \$750.
 - II. Local Transportation Allowances:
 1. Flat rate of \$20 Canadian dollars on transportation within the city where the conference is held.
 - III. Accommodation expenses:
 1. Fifty percent (50%) of their accommodation expenses at a hotel or other publically bookable accommodation to a maximum of \$50 per day, with the total number of nights of accommodation being subsidized being no greater than the total number of days over which the conference spans plus one (1), or a maximum of five (5) nights, whichever is less.



IV. Food, entertainment, and other expenses

1. No subsidy shall be provided for food, entertainment, and other expenses. Please note that this overrides reimbursements for delegate fees, should such costs be incurred.

6) **Subsidy Estimation and Reimbursement Process**

- A. Included in this application submitted by students must be a list of estimates of the full cost of all expenses expected to be reimbursed by the Society.
- B. Successful applicants should consult with the External Conferences Director or their delegate prior to incurring any expenses should they have altered from the original estimates.
- C. Should aggregate expenses incurred by the applicant following initial approval be in excess of 25% higher than the estimate approved by the Society, the Society may limit total reimbursements to that individual to 25% of the initial estimate, even if the revised amount requested to be reimbursed does not exceed those limits specified in this policy.

7) **Conference Attendance**

- A. Each delegate is considered to have made a commitment to attend the external conference upon submission of an application.
- B. If a delegate fails to attend the conference, he/she loses the right to attend future external conferences with reimbursement through ExCO. Any reimbursement agreements made beforehand will be withheld indefinitely.



8) Post-Arrival Procedures

A. Upon completion of an external conference, the delegate **MUST** email the ExCO contact who approved them within 30 days of the conference end date (note that failure to notify ExCO committee within 30 days of your conference end date and submit the required forms will result in the forfeit of your reimbursement):

I. Receipts (Original and photocopy) for all expenses related to the external conference

- i. Flights (Transportation to the destination city/area)
- ii. Transportation within location expenses
- iii. Delegate fees (and breakdown of expenses)
- iv. Accommodation expenses

II. THREE photos (in .jpg) of the delegate at the conference

Please note that these photos may be shared on our social media pages for promotional purposes, unless specified otherwise.

B. Prepare a 200 – 250 word summary of the learning outcomes of the participated conference to the External Conference Committee. This may be shared on our social media pages for promotional purposes unless specified otherwise.

9) Reimbursement Policy Clarifications

- A. All reimbursements are in Canadian dollars and the exchange rate is determined when all the relevant receipts are received.
- B. Special requests are made on a case-by-case basis.
- C. Reimbursement Policy is subject to change without notice. Please fully read and understand ExCO's policy before signing.