



Policies and Procedures RESEARCH & TEACHING

TRAVEL FUND PROCEDURES

1. Preamble

The University of Lethbridge Travel Fund has been established by the University of Lethbridge Board of Governors to reimburse expenses incurred by successful applicants for travel to meetings of learned societies, professional associations or similar groups.

The General Faculties Council Travel Committee ("Travel Committee") has delegated responsibility from General Faculties Council for the disposition of the travel funds in accordance with these approved procedures.

2. Definitions

"Academic Assistant" shall mean a member of the academic staff holding an appointment with the rank of Academic Assistant.

"Faculty Member" shall mean a member of the academic staff with the rank of Professor, Associate Professor, Assistant Professor, or Lecturer.

"Instructor" shall mean an employee of the academic staff holding an appointment with the rank of Instructor.

"Professional Librarian" shall mean a member of the academic staff holding an appointment in the University Library or in the Curriculum Laboratory of the Faculty of Education and holding an academic degree and a degree in librarianship from an accredited library school or its equivalent.

3. Amounts

The Travel Committee will set the maximum award amount for a travel grant prior to each travel year (July 1 to June 30) during the March meeting. The amount will be communicated to all eligible applicants. Those individuals whose contract is for less than 12 months or have been granted reduced load status may qualify for a reduced amount on a pro-rated basis.

| Approval Authority | Office of Responsibility | Implementation | Effective Date |
|---------------------------|--------------------------|----------------------|-----------------|
| General Faculties Council | VP Research | GFC Travel Committee | January 1, 2016 |

The total budget for each travel year will be allocated among four (4) travel periods (Section 4.1). Uncommitted funds from each travel period will be distributed among the remaining travel period(s) of the current travel year. Any uncommitted funds from travel period 4 will be distributed in the next travel year.

Proportional allocation of the budget to the four (4) travel periods will be examined by the Travel Committee at the March meeting of each travel year. If it is determined that the proportional allocation of grant applications to the four travel periods has changed, funding will be reallocated to more closely match anticipated demand.

Those who are awarded a travel grant will be reimbursed in accordance with these Travel Fund Procedures, and the [Travel and Business Expense Policy and Procedures](#).

4. Application Procedures

Eligible applicants are Faculty Members, Professional Librarians, Academic Assistants and Instructors. For the purposes of these procedures, persons holding Sessional Lecturer, Adjunct or Emeritus appointments shall not be considered eligible applicants.

The [Application for a Travel Assistance Grant](#) must be received in the Office of Research Services by the relevant application deadline date; however, documentation to support an identified priority level (Section 4.2) may be submitted later. Please note that only one grant will be given per paper, poster exhibition or performance.

All applicants must provide written notice to the Travel Committee of any changes to existing applications prior to or after being awarded a travel grant. The Travel Committee reserves the right to request a new application.

4.1. Deadlines

For any given year, there are four (4) travel periods and four (4) corresponding application deadlines:

| | Travel Period | Application Deadline |
|----------|--------------------------|-----------------------------|
| 1 | July 1 to September 30 | June 1 |
| 2 | October 1 to December 31 | September 1 |
| 3 | January 1 to March 31 | December 1 |
| 4 | April 1 to June 30 | March 1 |

Late applications will not be accepted, except in the case of newly appointed eligible applicants, whose positions commence after the travel period application deadline.

Such exceptions will only be provided if the application is received before the Travel Fund Committee meets to adjudicate the funds for the travel period in question.

The Travel Committee will accept an application from one year before the date of the event until the application deadline for that Travel Period.

4.2. Prioritization

The basis for approving applications for travel grants is on a “first-come, first-served” formula applied first to “First Priority” applicants and then, if remaining funds are available, to “Second Priority” applicants. Travel grants must align with the assigned duties of applicants.

4.2.1. First Priority

Eligible applicants taking an active part in the dissemination of research or artistic works (e.g. the presentation of papers or posters at professional meetings, conferences, or workshops; the presentation of artistic performances or exhibitions; and acting as an invited discussant at a professional meeting, conference, or workshop.) It is the responsibility of the applicant to provide the Travel Committee with written proof of such participation (e.g., letter of acceptance of paper, copy of program, etc.) prior to release of the travel grant funds.

4.2.2. Second Priority

Eligible applicants not taking an active part in the dissemination of research or artistic work (e.g. attending a professional meeting, conference, or workshop to see others' work presented and to interact with other professionals in one's field of study; and attending an artistic performance or exhibition to see others' work presented and to interact with other professionals in one's field of study.) It is the responsibility of the applicant to provide the Travel Committee with written documentation to support their application.

Those who have already received a travel grant during the current academic year will be treated as any other applicant for any unused balance of that first grant, up to the maximum.

All applications for a given travel period that are not approved, due to lack of available funds in a given period, will be considered retroactively in the event that cancellations are made on the part of members whose applications have been approved for that travel period. Such retroactive considerations will be made according to existing priorities.

5. Successful Applicant Expectations

It is the responsibility of the individual receiving a travel grant to submit a completed expense claim form to Financial Services no later than one month from the final day of the designated period of travel for which the grant was made.

In the event that this deadline is not met, the individual automatically becomes liable for the return to the University of the full amount of any travel advance received; moreover, no further claims against the travel grant in question will be honored.

The deadline for receipt of a completed expense claim form will be extended only in the event of a written request for extension which outlines the extenuating circumstances necessitating such an extension and, providing that the request is received prior to the expiration of the original one-month deadline for submission of a completed expense claim form.

In the event that an extension is granted by the Travel Committee, the same responsibilities and liabilities apply with respect to the extended deadline as apply in the ordinary case.

Document History: December 14, 2015; March 31, 2003;

As outlined in Article 30. Faculty Handbook. "*The President shall establish procedures to disburse the travel funds based on recommendations from the General Faculties Council in consultation with the Association. These procedures shall include a statement of criteria and priorities for allocation.*"