NOT IN EFFECT UNTIL JANUARY 1, 2027



TRAVEL EXPENSE MANAGEMENT POLICY

Principles

This policy relies on the University Community to engage in ethical, sustainable and responsible financial decision-making when spending funds that flow through the University for travel. Such funds include, without limitation, operating and research grants, donations, contract payments, and funds held in trust.

When practical, the University Community is encouraged to consider meeting virtually as a sustainable alternative to travel.

Purpose

To establish requirements for the authorization, management, and reimbursement of University travel expenses while ensuring accountability, fiscal responsibility, and compliance with applicable funding and legal requirements.

Scope

Applies to any member of the University Community who travels using funds administered by the University. Where there is a conflict between this policy or its procedures and a collective agreement, the terms of the collective agreement govern.

Definitions

Extraordinary Circumstances: Unforeseen, non-discretionary, and verifiable emergencies beyond a traveler's control, such as but not limited to illness, death in the family, natural disaster, labour dispute, etc.

Familiarization Visit: Offered in certain situations when an accepted offer of employment is in place. The visit is intended for appointees to meet with colleagues regarding curriculum and research matters, and to become familiar with the unit they are joining.

Group Travel: Travel involving multiple travellers attending the same event or travelling together for a common University purpose such as, but not limited to, participating in a group field trip, or competing, performing, or presenting as a team.

Most Economical: Refers to the travel option that provides the best overall value for the University, considering price and efficiency among other factors. While this is often the least expensive option, there are situations where a slightly higher rate or fare may be deemed more economical, such as a hotel that is closer to meeting venues and decreases transportation costs.

Receipt: An original document (electronic or paper) that demonstrates proof of travel expense payment and supports the amount requested for reimbursement on a travel expense claim.

Principal Investigator (PI): A researcher responsible for managing research funding, who must approve travel expenses charged to research projects they are the PI for and ensure compliance with applicable funding agency rules.

Postdoctoral Fellow: As defined in the *Postdoctoral Fellow Policy*.

Unit Head: Those holding the responsibility of a unit's budget and activities (or their delegate), with the authority to approve travel and the ability to assess that such travel is necessary, reasonable, legitimate, and appropriate.

University: Memorial University.

University Community: Comprised of all people who teach, conduct research, study, or work at or act under the auspices of the University and includes, without limitation, all employees, students and any other person(s) while they are acting on behalf of, or at the request of, the University.

University Corporate Travel Card: The University credit card approved by Financial Services for use by eligible frequent Travellers.

Traveller: any member of the University Community making a claim under the terms of the University travel policy and procedures.

Travel Service: A commercial service that provides travel quotations and bookings and assists with booking management. Information on the University's current supplier can be provided by Strategic Procurement.

Visitor: A person invited by the University to temporarily teach, conduct research, collaborate or consult, or act as a special guest, including but not limited to distinguished professors, visiting researchers, scholars, visiting government officials and other guests of honour.

Policy

1. **General**: Travel expenses will be reimbursed when:
    - properly authorized by the appropriate Unit Head(s);
    - reasonable and necessary for University travel;
    - supported by required documentation (e.g., receipts); and
    - compliant with applicable funding, contractual, and legal requirements.

2. Responsibilities:

2.1. Travellers

- Adhere to this policy and all other related policies and procedures for travel authorization, claims and risk management, and seek guidance when such policies and procedures are unclear.
- Confirm that travel with the appropriate Unit Head(s) before committing funds to travel.
- Maintain appropriate documentation to justify the Most Economical travel arrangements.
- Claim only actual out-of-pocket expenses for legitimate purposes allowable within this policy, and/or applicable granting agency guidelines or awards, whichever imposes greater restrictions.
- Book and manage travel arrangements, including changes and cancellations.

2.2. Unit Heads:

- Confirm travel necessity, legitimacy, reasonableness and eligible source(s) of funding before a Traveller commits funds to travel, which may include consulting with other Unit Heads to make a determination.
- Direct Travellers to this policy and other related University travel policies and procedures.
- Certify that all expenses claimed are eligible for reimbursement per this Policy and related Procedures.

2.3. Financial Services:

- Uphold service quality which includes, without limitation, timely audit and processing of travel claims submitted in accordance with this policy, related procedures and applicable law, and responding to requests for policy and procedure interpretation.
- Ensuring all travel expense claim documentation is received and retained for legal and audit purposes as per the Procedure for Retention and Disposal Schedules.

3. Externally Funded Travel

3.1. Travel funded by external grants or contracts that flow through the University must comply with both this policy and any applicable sponsor requirements.

3.2. Where sponsor requirements are more restrictive, the more restrictive requirements apply.

3.3. Where this Policy and related Procedures are silent on an expense category required (not recommended) by a sponsor, a copy of the related contract or program provisions must be included during the claims process.

4. Authorization to Travel

4.1. Confirm planned travel expenses with the Unit Head before committing funds to help ensure such expenses are following University policies and procedures and any applicable funding agreements.

4.2. To ensure impartial oversight and accountability, Travellers cannot authorize their own travel.

5. Travel Arrangements

5.1. When arranging travel, seek the Most Economical solution and use the contracted Travel Services provider.

5.2. Travel arrangements, payment methods, travel standards, and allowable expenses are described in the applicable travel procedures.

6. Travel Cancellation

6.1. When travel must be cancelled, all bookings made in the name of a Traveller (e.g., airfare, accommodations, car rentals, etc.) must be cancelled prior to cancellation deadlines, and a refund or travel credit should be obtained where applicable.

6.2. Any non-recoverable out-of-pocket expenses are only eligible for reimbursement when cancellation is due to Extraordinary Circumstances, and the service provider's policies do not allow for cancellation due to such Circumstances.

6.3. Circumstances such as, but not limited to, minor delays or those that could have been managed through planning are not usually considered Extraordinary.

7. Pre-Employment Travel

7.1. When authorized, a Unit Head or search committee may invite candidates from the short list to visit the University for an interview. Units are referred to the *Procedure for Pre-Employment Interviews* for eligible expenses.

7.2. In accordance with an employment contract and/or relevant collective agreement, an appointee may be eligible for reimbursement of travel expenses related to a Familiarization Visit and/or relocation to their new place of employment with the University. Eligible new appointees are referred to the *Procedure for Familiarization Visits* and the *Procedure for Relocation and Removal.*

7.2.1. Newly appointed Postdoctoral Fellows are referred to the *Procedure for Arranging Relocation for a Postdoctoral Fellow* for eligible relocation expenses.

8. Visitor Travel

8.1. On occasion, Visitors to the University are eligible for reimbursement of some travel expenses and are referred to the *Procedure for Visitor Travel* for further details**.**

9. Travel Outside of Canada

9.1. All Travellers will manage risk when travelling outside of Canada by adhering to the *Travel Outside of Canada Policy* and its related procedures when planning and engaging in such travel.

10. Group Travel

10.1. Groups travelling for a common University purpose are encouraged to coordinate travel arrangements through the University's Travel Service provider where practical.

10.2. Individual Travellers remain subject to University travel authorization, reimbursement, and risk management requirements, including the *Travel Outside of Canada Policy* where applicable.

10.3. Unique aspects of athletic team and student group travel may benefit from having some expenses paid on a group basis as an exception to the general rule that individuals must pay their own expenses. Such groups are encouraged to work with Financial Services to confirm appropriate methods of payment and reimbursement.

11. Expense Reimbursement

11.1. Allowable expenses for reimbursement and the travel expense claim process are described in applicable procedures.

11.2. Approval from a Unit Head is required for all expense claim reimbursements.

11.3. Principal Investigators claiming their own travel expenses from research grants must be countersigned by the Unit Head, confirming that expenses do not contravene funding body or University policy.

11.4. Expense reimbursements may be audited by internal or external auditors, including funding agencies. Reimbursement of expenses does not constitute ultimate approval, and reimbursement may be subject to subsequent audit adjustments if expenses

claimed are not allowed within this policy and/or applicable granting agency guidelines or awards.

12. Travel Deviations

12.1. At times, Travellers may encounter circumstances where anticipated or incurred expenses deviate from this travel policy, and/or other related procedures but may be deemed appropriate for reimbursement. In such cases, deviations may be submitted as described in the *Procedure for Travel Authorization*.

13. Non-compliance

13.1. Travellers who make travel purchases outside of this policy and related procedures or any other funding or collective agreement may experience reimbursement delays (especially during peak travel times), interest charges, claims that are denied, and/or payment in error that will require reimbursement to the University.

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Authority: Office of the Vice-President (Finance and Administration) via the Associate Vice-President (Finance) and Chief Financial Officer

Sponsor: Office of the Vice-President (Finance and Administration) via the Associate Vice-President (Finance) and Chief Financial Officer

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Related Documents

Schedule for Reimbursable Expenses

Procedures:

Procedure for Familiarization Visits
Procedure for Pre-Employment Interviews
Procedure for Relocation and Removal
Procedure for Relocation of Postdoctoral Fellows
Procedure for Travel Authorization
Procedure for Travel Claims and Reimbursement
Procedure for Travel Expense Management
Procedure for Visitor Travel