



Concordia University of Edmonton

Students' Association

STUDENT COURSE, CONFERENCE & TRAVEL POLICY

CONCORDIA STUDENTS' ASSOCIATION

CONCORDIA UNIVERSITY OF EDMONTON

EDMONTON, ALBERTA

Concordia Students' Association
Student Conference & Travel Policy

Policy: CSA Student Conference & Travel Policy

Category: Organizational Policies

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1.0 Definitions

- **Activity:** A course, conference, any type of travel, or other reimbursable events or items that an individual is seeking or has obtained CSA funding to partake in.
- **Business Day:** a weekday on which the CUE Academic Calendar does not specify that the university is closed.
- **Club:** Are directly responsible to the CSA VP Finance and Executive Council and are governed by the CSA's By-laws and policies.
- **CSA:** Concordia Students' Association
- **CUE:** Concordia University of Edmonton
- **Economically Efficient (Transportation):** The mode of transportation that allows the individual travelling to safely arrive at their intended destination with the lowest overall cost in terms of monies and time spent travelling.
- **Fiscal Year:** The period over which annual financial statements are calculated; the CSA's fiscal year commences on May 1 and ends on April 30.
- **Member:** The student applying for funding shall be referred to as the applicant and participant.
- **Participant:** An active CSA member, in good-standing, who has applied for reimbursement for an activity outlined in this policy, or who is intending to apply for reimbursement.
- **Union:** Are identified by their distinctive population and represent academic faculties at Concordia. Unions are directly responsible to the CSA VP Finance and General Council, and are governed by the CSA's By-laws and policies.
- **Stopover:** An interruption in travel to, during, or after an activity that is not necessary for the completion of the activity.
- **Travel Advisor:** An individual qualified, through experience or secondary education, to offer informed travel planning advice.

1.1. Applicable Legislation and Bylaws

- 1.1.1. All policies and procedures of Concordia Students' Association (CSA) are subject to the provisions of Albertan and Canadian legislation, in particular the *Societies Act* (as in-force), and *Cooperatives Act* (as in-force), as well as the CSA Objects, and the CSA Bylaws.

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- 1.1.1.1. If there is a conflict between the provisions of any CSA policy or procedure and the provisions of Albertan or Canadian jurisprudence or CSA Objects or CSA Bylaws, then the provisions of the Albertan or Canadian legislation, CSA Objects or CSA Bylaws shall prevail, with precedence given to the Albertan or Canadian legislation.
- 1.1.2. The policies and provisions herein shall apply to all active CSA members in good standing as defined in the *CSA Bylaws*.
- 1.1.3. The policies and provisions herein are subject to change without notice to CSA Members. It is the obligation of CSA Members to remain informed of any changes.

2.0 Governing Authority

2.1 Executive Council

- 2.1.1. Approval for any reimbursable expenses outlined in this policy is determined by the CSA Executive Council under the direction of the CSA President who administers this policy and applications towards it;
 - 2.1.1.1. If required, the CSA Executive Council may consult with a travel advisor, or any other qualified person, of their choice regarding any aspects related to the application.
- 2.1.2. The CSA Executive Council will approve, deny, or alter the reimbursed amount sought out through the application.
- 2.1.3. The participant can consult with the Executive Council in regards to the trip with the CSA President as the initial contact requesting individual.
- 2.1.4. The Executive Council may request a presentation or paper, on what was learned and done during the activity, to be made by participants within 15 days of the end of the activity or the return of the participants to CUE, whichever comes later unless agreed to by the Executive Council.

3.0 Courses

3.1. Purpose:

- 3.1.1. To outline the parameters of courses that students may apply for funding to attend.

3.2. Policy:

- 3.3. All course attendees seeking funding access must apply through the CSA Course, Conference & Travel Fund
 - 3.3.1.1. An application form can be found on the CSA website and must be used to apply.
 - 3.3.1.2. All course applications must be submitted one hundred and twenty (120) days in advance of the course start date if travelling internationally.
 - 3.3.1.3. All course applications must be submitted sixty (60) days in advance of the course start date if travelling within Canada.
 - 3.3.2. Courses are identified as falling into the following general categories, but are not limited to these categories.
 - 3.3.2.1. Leadership
 - 3.3.2.2. Personal Development
 - 3.3.2.3. Professional Development
 - 3.3.3. Members seeking reimbursement for a course must retain and be able to present the following documentation upon request by the CSA prior to the course:
 - 3.3.3.1. Prior to the course;
 - 3.3.3.1.1. The inclusive cost of the course, including all applicable fees and surcharges.
 - 3.3.3.1.2. A course outline or equivalent
 - 3.3.3.1.2.1. This must include the location, duration, instructor qualification or background, and learning objectives or outcomes of the course.
 - 3.3.3.2. After the course;
 - 3.3.3.2.1. Receipts or an invoice for the final course cost.
 - 3.3.3.2.2. Any changes to the course outline or equivalent.
 - 3.3.3.2.3. Materials distributed for instructional purposes at the course that course participants may choose to retain after the completion of the course.
 - 3.3.4. Participants must abide by all CUE policies, procedures and forms related to the course.
 - 3.3.5. Case-by-case risk assessments will be made by the CSA Executive Council.

4.0 Conferences

4.1. Purpose:

- 4.1.1. To outline the parameters of conferences that students may apply for funding to travel and to attend.

4.2. Policy:

- 4.2.1. All conference attendees seeking funding access must apply through the CSA Course, Conference & Travel Fund.
 - 4.2.1.1. An application form can be found on the CSA website and must be used to apply.
 - 4.2.1.2. All conference applications must be submitted one hundred and twenty (120) days in advance of the travel date if travelling internationally.
 - 4.2.1.3. All conference applications must be submitted sixty (60) days in advance of the travel date if travelling within Canada.
- 4.2.2. Courses are identified as falling into the following general categories, but are not limited to these categories.
 - 4.2.2.1. Leadership
 - 4.2.2.2. Personal Development
 - 4.2.2.3. Professional Development
- 4.2.3. Members seeking reimbursement for a conference must retain and be able to present the following documentation upon request by the CSA
 - 4.2.3.1. Prior to the conference:
 - 4.2.3.1.1. The inclusive cost of the conference, including all applicable fees and surcharges.
 - 4.2.3.1.1.1. A conference schedule, outline or equivalent
 - 4.2.3.1.1.1.1. This must include the location, duration, information on individual sessions, and learning objectives or outcomes of the course.
 - 4.2.3.1.2. After the conference;
 - 4.2.3.1.2.1. Receipts or an invoice for the final conference cost.
 - 4.2.3.1.2.2. Any changes to the conference schedule, outline or equivalent.
 - 4.2.3.1.2.3. A conference program and name tag
 - 4.2.3.1.2.4. For conferences that require a flight or bus, the claimant must include the flight or bus tickets.
 - 4.2.3.2. After the conference;
 - 4.2.3.2.1. Receipts or an invoice for the final conference cost.
 - 4.2.3.2.2. Any changes to the conference schedule, outline or equivalent.
 - 4.2.3.2.3. A conference program and name tag
 - 4.2.3.2.4. For conferences that require a flight or bus, the claimant must include the flight or bus tickets.
- 4.2.4. Participants must abide by all CUE policies, procedures and forms relevant to the conference.
- 4.2.5. Case-by-case risk assessments will be made by the CSA Executive Council.

5.0 Travel

5.1. Purpose:

- 5.1.1. To outline the parameters of travel that students may apply for funding to reimburse.

5.2. Policy

- 5.2.1. All participants seeking funding access for travel must apply through the CSA Course, Conference & Travel Fund.
 - 5.2.1.1. An application form can be found on the CSA website must be used to apply.
 - 5.2.1.2. All travel applications must be submitted one hundred and twenty (120) days in advance of the travel date if travelling internationally.
 - 5.2.1.3. All travel applications must be submitted sixty (60) days in advance of the travel date if travelling within Canada.
- 5.2.2. Travel cannot be applied for independent of another activity, and must be directly and temporally related to the linked activity. Acceptable activities include but are not limited to;
 - 5.2.2.1. A reimbursable course
 - 5.2.2.2. A reimbursable conference
- 5.2.3. All supporting documents required for international travel must be presented a minimum of sixty (60) days before travel date including but not limited to: passports, visas, insurance, travel itinerary, accommodation and all additional CSA Executive Council requested documents and information.
 - 5.2.3.1. All participants must obtain and provide proof of valid travel insurance.
 - 5.2.3.2. All participants must have a passport which does not expire within 6 months of the travel date for international travel.
 - 5.2.3.3. All visas must be purchased prior to booking flights.
- 5.2.4. Members seeking reimbursement for travel must retain and be able to present the following documentation upon request by the CSA
 - 5.2.4.1. Prior to travel:
 - 5.2.4.1.1. The inclusive cost of travel, including all applicable fees and surcharges.
 - 5.2.4.1.1.1. An itinerary or equivalent
 - 5.2.4.1.1.1.1. This must include the location(s), duration, objectives or outcomes of the travel.
 - 5.2.4.1.1.1.2. All reimbursable expenses must be included on the itinerary, including but not limited too

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- 5.2.4.1.1.1.2.1. Accomodations
- 5.2.4.1.1.1.2.2. Travel
 - 5.2.4.2. After Travel;
 - 5.2.4.2.1. Receipts or an invoice for the final travel cost.
 - 5.2.4.2.2. Any changes to the travel itinerary or equivalent.
 - 5.2.4.2.3. Receipts or invoices for all reimbursable expenses.
 - 5.2.4.2.4. Where possible, tickets or vouchers associated with travel.
 - 5.2.5. Participants must abide by all CUE policies, procedures and forms relevant to travel.
 - 5.2.6. Case-by-case risk assessments will be made by the CSA Executive Council.
 - 5.2.7. All participants must abide by [Government of Canada travel advisories](#).
 - 5.2.7.1. No reimbursement will be given for travel to countries with an advisory greater than or including “Exercise a high degree of caution (with regional advisories)” at the time at which travel expenses are incurred.
 - 5.2.7.2. In the event that the travel advisory status of a country changes to reflect a greater risk than ““Exercise a high degree of caution (with regional advisories)” after travel expenses are incurred the CSA Executive Council may deny reimbursement, at their discretion.

6.0 Individual Participants

6.1. Purpose:

- 6.1.1. To outline the responsibilities of the person applying for CSA reimbursement of a course, conference, or travel.

6.2. Policy

- 6.2.1. The Participant must be a current active CSA Member as defined in the *Bylaws* and this policy.
- 6.2.2. The Participant must maintain the following prior to and for the duration of the course, conference, or travel until reimbursement:
 - 6.2.2.1. A minimum GPA of 2.0.
 - 6.2.2.2. No active or active at-fault Academic Disciplinary cases against them.
 - 6.2.2.3. No active or at-fault Non-Academic Disciplinary cases against them.
- 6.2.3. Participants are responsible for completing a reasonable amount of research about their destination, travel process, and the

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- requirements to complete their activity.
- 6.2.3.1. Participants are encouraged to seek 3rd-party planning advice from a travel advisory or qualified person.
 - 6.2.3.2. Participants should be mindful of ensuring that any additional requirements for travel such as Travel Visa, Immunization Shots, or others, are made in a timely manner for the country the Participant is visiting.
 - 6.2.4. Adhere to the Concordia University of Edmonton Code of Conduct.
 - 6.2.5. The Participant accepts that they retain sole liability for any acts or incidents related to the subject event or travel and releases the CSA from any and all forms of liability that may be incurred through the duration of any travel or event.
 - 6.2.6. No Individual CSA Member shall have access to more than \$1000 from the Conference & Travel Grant Fund in the fiscal year.
 - 6.2.6.1. When applying to the CSA Executive for reimbursement, the Participant will be reimbursed a maximum of \$500 or 50% of the total cost of the activity, whichever is less and in accordance with the application grading rubric.
 - 6.2.6.2. Any participant may apply to use this policy a maximum of 2 times in an academic year or 4 times during the duration of residency at Concordia.

7.0 Club and Union Participants

7.1 Purpose:

- 7.1.1. To outline the responsibilities of the person applying for CSA reimbursement for an activity as part of an active CSA club or active CSA union (hereafter referred to as a “club” or “union”).

7.2 Policy

- 7.2.1. The Participant must meet all individual participant responsibilities as outlined above in 6. (Individual Participants).
- 7.2.2. The participant must be an active member of the club or union, in good standing as determined by the CSA Executive Council, planning to undertake the activity.
- 7.2.2.1. No individual Club or individual CSA Union shall have access to more than twenty five (25%) of the Conference & Travel Grant Fund.
- 7.2.2.1.1. A Club or Union member who is involved in other Clubs or Unions will only be able to apply for the maximum individual amount once per fiscal year, with any reimbursed amounts contributing only to

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the percentage of the Club or Union reimbursement through which the activity is organized.

- 7.2.3. A Club or Union intending to engage in an activity will provide a contract template relevant to the activity to the CSA VP Finance when handing in their fiscal budget for the upcoming year.
- 7.2.3.1. All members of the Club or Union must sign an approved contract thirty (30) days prior to the activity in order to participate.
- 7.2.3.2. For international activities, approved contracts must be signed by all attendees sixty (60) days in advance from the departure date.
- 7.2.4. The Club or Union contract must provide details required in the Course, Conference, and Travel sections of this policy as well as how the Club or Union intends to cover the total cost, with or without CSA reimbursement. This may include, but is not limited to, fundraising or personal contributions.

8.0 Reimbursable Expenses

8.1. Purpose

- 8.1.1. This policy is to let the Participant discern acceptable expenses for reimbursement by the CSA for reimbursable activities.

8.2. Policy

- 8.3. Expenses which are reimbursable are:

8.3.1. Courses

- 8.3.1.1. CSA members may apply to have courses pursued for professional development, personal development reimbursed.
 - 8.3.1.1.1. These courses must be relevant to and benefit the CSA and or the CSA membership and be of a professional nature.
 - 8.3.1.1.2. Courses will be reimbursed to a maximum of 50% of the total cost of the course or \$500, whichever is lower and in accordance with the application grading rubric.
 - 8.3.1.1.3. Courses directly related to improving student health, wellbeing, or safety shall be reimbursed to a maximum of 75% or \$500, whichever is lower and in accordance with the application grading rubric.
 - 8.3.1.1.3.1. Examples of these courses include, but are not limited to;
 - I. Mental Health First Aid Training
 - II. Wellness Training
 - III. Indigenous Awareness Training
- 8.3.1.2. CSA members may not apply for reimbursement of courses

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including but not limited;

8.3.1.2.1. Academic courses taken for credit in any method or duration.

8.3.2. Conferences

8.3.2.1. Conference Fees

8.3.2.1.1. Not including tours put on by the conference,

8.3.2.1.2. Including delegate fees, and registration fees.

8.3.3. Travel

8.3.3.1. Flights

8.3.3.1.1. The most economically efficient form of air travel to and from the destination.

8.3.3.1.1.1. Luggage costs and upgrades to first class or specific seating are not reimbursable.

8.3.3.1.1.2. Additional comfort options are not reimbursable.

8.3.3.2. Other Transportation

8.3.3.2.1. In the event that flying is not the most economically efficient form of travel to and from the destination other forms of safe travel are acceptable, as determined in advance by the CSA.

8.3.3.2.1.1. Luggage costs and upgrades to first class or specific seating are not reimbursable.

8.3.3.2.1.2. Additional comfort options are not reimbursable.

8.3.3.3. Intra-Destination Transportation

8.3.3.3.1. Transportation between the following locations are eligible for reimbursement, using the most economical form of safe transport;

8.3.3.3.1.1. The original point of arrival at the destination.

8.3.3.3.1.2. The accommodations used for the duration of the activity.

8.3.3.3.1.3. Any locations directly associated with the activity

8.3.3.3.1.4. Domestic ground transportation to and from conferences within province or as specified by the CSA Executive Council

8.3.4. Accommodations

8.3.4.1. Hotel rooms

8.3.4.1.1. Hotel rooms are reimbursable for the duration of the activity and, if in the case of an arrival to the destination one day early, the night before the activity begins;

8.3.4.1.1.1. For single or two person (double) occupancy, a maximum of \$75 of the room cost is reimbursable by each claimant.

8.3.4.1.1.1.1. In the event that a participant is traveling unaccompanied they shall reimburse the two person occupancy rate.

8.3.4.1.1.2. For three-person (triple) or more occupancy, \$50-67 of the room is reimbursable, divided by each of the occupying claimants to a

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- maximum of \$200 per room.
- 8.3.4.1.1.3. Hotel extras such as mini bar, movies, dry cleaning, pay per view, room services etc. are not reimbursable.
- 8.3.4.2. Other accommodations or housing**
- 8.3.4.2.1. Alternative forms of accommodations, other than a hotel, may also be reimbursed for the duration of the activity and, if in the case of late arrival, the night before the activity begins;
- 8.3.4.2.1.1. Any alternative forms of housing must be safe and conform to local legislation and bylaws surrounding temporary accommodations.
- 8.3.4.2.1.2. Any expenses for alternative accommodations must not exceed the equivalent rate, per person and size of room, of an equivalent hotel room, to the same maximum of \$200 per night for an occupancy greater than 4.
- 8.3.4.2.1.3. Extras such as mini bars, movies, dry cleaning, pay per view, room services, television or internet access, etc. are not reimbursable.
- 8.3.4.2.1.4. All housing must be legitimate and provide a formal receipt with applicable regional requirements (GST#'s for Domestic locations)
- 8.3.4.2.1.5. The Executive Council must approve all alternative accommodations prior to booking for price comparison. This approval does not remove the participant from retaining all liability associated with the accommodation

9.0 Reimbursement Procedure

9.1. Purpose

- 9.1.1. This policy is designed to clarify the manner in which reimbursements will be processed and requirements for reimbursement.

9.2. Policy

- 9.2.1. Per the Course, Conference, and Travel sections the participant must prepare a completed application form, with all pertinent details, as determined by the CSA Executive Council, prior to the deadline for their activity.
- 9.2.2. Participants will be reimbursed the amount approved by the CSA following return and submission of all receipts, documents, and additional documents outlined in this document or requested by the CSA.
- 9.2.2.1.1. The CSA Executive Council will create if requested by the applicant of an approved funding request, a Letter of Intent for any

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- Participant for approved personal fundraising purposes.
- 9.2.2.1.1.1. All fundraising efforts utilizing the CSA Executive Council Letter of Intent must be approved by the CSA Executive Council in-writing.
 - 9.2.2.1.1.2. The participant releases the CSA from any and all liabilities related to all fundraising activities as these activities are engaged by the participant with CSA expectation of adherence to all applicable laws, bylaws, and policies.
 - 9.2.2.2. The claimant is responsible for retaining all original receipts and other documentation while partaking in the activity, as outlined in the applicable sections in this policy.
 - 9.2.2.2.1. The claimant is responsible to ensure that all expenses are in accordance with this document and submitted to the CSA Executive as outlined.
 - 9.2.2.2.2. Upon return the claimant shall submit the required documentation and receipts to the CSA Executive within ten (10) business days.
 - 9.2.2.2.3. Expenses incurred at stopovers that are unnecessary for the purpose of the travel business and are avoidable shall be at the claimant's personal expense.
 - 9.2.2.2.4. Only the most economical typical method of travel shall be reimbursed. When the claimant, for personal convenience, chooses an alternative that is a more costly method of travel, the maximum reimbursement will be based on the lowest cost alternative.
 - 9.2.2.2.4.1. Any claimants with physical and/or mental disabilities or special needs that require assistance during travel are eligible for reimbursement for the most economical form of travel which accommodates their disability.
 - 9.2.2.2.4.2. The claimant is responsible for creating the request in a timely matter to ensure the activity expenses are incurred within the current fiscal year.
 - 9.2.2.2.5. If an activity is not reconciled as required, future activity requests shall be denied and alternative methods may be sought to reconcile the account.
 - 9.2.2.2.6. If the claimant incurs activity expenses on behalf of another student, that student must provide written consent forfeiting their right to reimbursement which is to be submitted to the VP Finance.
 - 9.2.2.3. Participants may request that the CSA pay for any approved type of reimbursable expense prior to the participant spending monies on the purchase if they cannot make the purchase(s) personally.
 - 9.2.2.3.1. The CSA Executive Council will approve partial in rare and

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- individually specified cases where the participant clearly demonstrates an inability to pay for the applicable expenses and has made reasonable effort to engage alternate funding sources.
- 9.2.2.3.2. The CSA Executive Council may grant up front payment assistance not exceeding 50% of the total approved funding value if required by the applicant and all other criteria are met.
 - 9.2.2.3.3. The total funding value is determined by the application rubric
 - 9.2.2.3.3.1. This will not exceed 25% of the total cost of the activity.
 - 9.2.2.3.4. The participant must make all reasonable efforts to fully participate in any activity paid directly by the CSA per section 9.2.2.3.
 - 9.2.2.3.4.1. In the event that a participant does not fulfil the obligation in 9.2.2.3 to participate in CSA approved and pre-purchased activities, with the reasonable effort determined by the CSA Executive Council, the participant will have ninety (90) days to repay any outstanding balance.
 - 9.2.2.3.4.2. The CSA Executive council retains the right to enforce collections actions against any Participant who fails to comply with payment after the ninety (90) day repayment period.
 - 9.2.2.3.5. Any Participant requiring repayment for revoked funding status will no longer be eligible to participate in CSA events until repayment is complete.
- 9.2.3. Participants may not attempt to reimburse expenses that would qualify as a conflict of interest, as defined in the CSA *Bylaws*.

10.0 Exception Policy

10.1. Purpose

- 10.1.1. This policy is intended to allow the CSA Executive Council to override restrictive clauses which may prohibit student access to funding due to extenuating circumstances.

10.2. Policy

- 10.2.1. The Executive Council retains the rights to address and grant exceptions or exclusions to any section of this policy on a case-by-case basis and can determine if that exception or exclusion is in the interests of the CSA and CSA membership.
- 10.2.2. The application and approval for exception must be received no less than thirty (30) days prior to travel.
- 10.2.3. The exception or exclusion decision made by the Executive Council can be petitioned through the Judicial Board if at least one EC

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- member vote is attained.
- 10.2.3.1. If a petition is made, the petition must go to the Judicial Board chair.
 - 10.2.4. The procedures outlined in the *CSA Bylaws* will govern the Judicial Board adjudication process.

11.0 Effective Implementation Date

11.1. Purpose

- 11.1.1. This policy is designed to clarify the date the policy is declared to be effective.

11.2. Policy

- 11.3. As per the *Policies* Policy this policy is deemed to be in-force upon approval of the General Council, as reflected in the publicly posted meeting minutes.
- 11.4. This policy is also deemed retroactively in-force from January 2019 to the date of approval by the General Council.
 - 11.4.1. Any claims or actions taken following this policy during the time-period in 11.4 are deemed to have occurred through the approved policy.
 - 11.4.2. Notwithstanding the effective date of the policy, all reimbursements that follow the guidelines and procedures dictated in this policy are deemed valid reimbursements.