

UMSU Student Travel and Conference Attendance Policy & Procedure

Policy

The University of Melbourne Student Union (UMSU) recognises that travel is often an integral part of student representative activities, and that there are financial barriers that may impact students wanting to attend conferences relevant to their interests and passions. This policy governs the use of UMSU funds paid to students and student representatives, in the form of a grant or subsidy that is not repayable to UMSU, to support travel to and attendance at conferences.

The policy is designed to provide maximum convenience, flexibility and safety for travelers, to help ensure the financial integrity of all travel payments and maintenance of accurate records, and to ensure the consistent and fair treatment of all travelers who are directly or indirectly involved in the travel process.

Travelers and authorising officers are expected to exercise prudent judgement at all times when booking, authorising and undertaking travel.

All travel must be consistent with the objectives established in the UMSU Constitution.

Definitions

A **traveler** is a student or student representative who has applied for and/or received funding pursuant to this policy.

An **authorising body** is Students' Council, or any UMSU Committee responsible for administering the policy, including the consideration and approval of grants.

A **grant** or **subsidy** is money provided to a student specifically for the purpose of approved travel or conference attendance as per this policy.

A **report** is a submission to the authorising body by a traveler on the use of their grant or subsidy, using Appendix 2 only.

1. Scope of policy:

- 1.1. This policy shall cover all travel undertaken or conferences attended by a student or student representative that has been subsidised directly by UMSU.
- 1.2. This policy shall also cover UMSU office bearers or Students' Councillors' travel and conference expenses subsidised by other organisations as part, and where the travel or conference attendance arises from their role in UMSU
- 1.3. The sole purpose of these subsidies shall be to further the objectives of UMSU. Only subsidies with this purpose are allowable. Any individual personal or professional development must be considered within this context.
- 1.4. Travel may include representation in an official UMSU capacity, attendance at a conference or travel event, and participation in community service.

2. Eligibility and preference for subsidies:

- 2.1. Eligibility for subsidies must be made very clear, and must be based on fair and reasonable conditions.
 - 2.2. Preference for all subsidies shall be given to those whose attendance is contingent upon financial support or for whom it is a part of their regular duties.
 - 2.3. In the case of regular or annual conferences, preference for subsidies shall be given to those who may gain the most from those conferences, such as often first time attendees to those conferences.
 - 2.4. The process for determining the allocation of subsidies must be transparent and will be available with conditions of eligibility.
 - 2.5. All travelers must engage in appropriate behaviour whilst travelling and must adhere to all relevant UMSU and University policies including the UMSU Acceptable Conduct Policy.
- 3. Expenses allowable for UMSU direct subsidies to individuals:**
- 3.1. Transport subsidies to and from the venue for conferences or travel events outside of metropolitan Melbourne, where this travel is the most efficient and cost-effective option without imposing an undue, unreasonable burden on the traveler.
 - 3.2. Accommodation subsidies for a travel event or conference held outside metropolitan Melbourne.
 - 3.3. Subsidies for the registration fees for the conference or travel event.
 - 3.4. Subsidies for any ancillary or miscellaneous costs deemed acceptable by Students' Council or the relevant committee.
- 4. Expenses non-allowable for UMSU direct subsidies to individuals:**
- 4.1. Subsidies for food that are not included as part of a conference or a conference registration fee.
 - 4.2. Transport subsidies for a travel event or conference entirely held in metropolitan Melbourne occurring entirely within business hours, unless that is part of a conference registration fee.
 - 4.3. Transport within the locale of the conference, for example, travellers cannot receive subsidies for transport from the accommodation to the conference.
 - 4.4. Accommodation subsidies for a travel event or conference entirely held in metropolitan Melbourne with activity (formal or informal) occurring entirely within business hours, unless that is part of a set conference registration fee.

Procedures

- 1. Procedure for approving UMSU direct subsidies:**
 - 1.1. All subsidy opportunities which do not fall clearly within the established roles and responsibilities of an office bearer or Students' Councillor, whether they be UMSU-funded or funded by an external organisation to UMSU to offer, must be openly advertised to all those potentially eligible, for a period of at least 14 days.

The relevant UMSU department or entity will release information about conference subsidies on the UMSU website.

- 1.2. Subsidy opportunity information must include:
 - 1.2.1. The details of the travel event or conference.
 - 1.2.2. The conditions to which granting of the subsidies is restricted (such as to a particular group or collective).
 - 1.2.3. Closing dates for subsidy applications.
 - 1.2.4. The process in which subsidy grants will be decided, including criteria, applicant form and those who will make the decision.
 - 1.2.5. The amounts being provided to fund individual subsidies or the total amount allocated to the particular subsidy pool and which budgets or funders the money is coming from.
- 1.3. Applicants for subsidies are to fill out a form with questions relevant to the conference and their financial situation. The Office Bearer(s) of the Department that is granting these subsidies are to create the relevant form.
 - 1.3.1. If Students' Council is providing funding then the General Secretary is the relevant Office Bearer for the purpose of part 1 of this Procedure.
- 1.4. The authorising body will prioritise and determine the recipients of grants and the monetary value of each grant.
- 1.5. If members of the authorising body are not able to vote for reasons of a conflict of interest, the Office Bearer(s) or other UMSU elected representatives can take on the role as outlined in clause 1.4.
 - 1.5.1. Regardless of who undertakes the duties of 1.4 and 1.5, the authorising body shall ultimately either approve or reject the proposed grants en bloc after 1.4 and 1.5 are completed.
 - 1.5.2. Office Bearer(s) and other UMSU elected representatives undertaking the duties of 1.4 and 1.5 may not make an en bloc approval or rejection as contemplated in 1.5.1.
- 1.6. If subsidies are approved, the relevant Office Bearer(s) are to alert the successful applicants. The email must attach and/or outline the conference applied for, the amount granted, the UMSU Acceptable Conduct Policy, and the agreement for payment of UMSU direct subsidies to individuals (appendix 1).
- 1.7. The Agreement for Payment of UMSU direct subsidies for individuals is to be returned before the start date of a conference or travel event. If it is not returned by this time, the subsidy is forfeited.
- 1.8. Anyone who has been awarded funding pursuant to this Policy must keep receipts or invoices for items relevant to the payment of a subsidy.
- 1.9. A report must be written by the successful applicant and presented to the relevant authorising body. The report must be in the format set out in Appendix 2.

2. Reporting requirements:

- 2.1. All reports must be submitted in the format set out in Appendix 2.

- 2.2. Travelers must submit a written report about their travel event or conference within a month of its conclusion, to the relevant Office Bearer(s) and/or the General Secretary and tabled in the relevant authorising bodies.
- 2.3. This report must include details of the knowledge and skills gained from the Conference or travel event, the activities undertaken, how this combination of experiences, skills and activities can be used to improve or enhance the student experience for students at the University of Melbourne, and the expenditure of the subsidy.
- 2.4. Failure to do this within a month of conclusion shall result in the subsidy being recovered (if it is an UMSU-funded subsidy and if it was already given) and honoraria from that travel event or conference period being recovered (if no leave is taken). A person may also voluntarily pay back the money or forfeit the subsidy within a month of conclusion if they do not wish to submit a report.
- 2.5. Travelers attending a conference on behalf of UMSU or with UMSU's support will comply with these reporting requirements regardless of whether they have received a grant or subsidy.

Appendix 1:

Agreement for the Payment of UMSU direct subsidies to individuals

This agreement must be returned before the conference start date.

This contract is between a successful applicant for a subsidy to attend the [conference name], and the [department/division/initiative] of UMSU Inc., as represented by the [committee or council].

[name]_____ and the [department/division/initiative] of UMSU Inc. hereby agree as follows:

1. That a sum of money shall be given from the [department/division/initiative] to the above applicant, as determined by a selection panel comprising of two UMSU elected representatives. This sum has been set for the above applicant as: [amount \$] _____.
2. That the above sum shall be given in the form of reimbursement upon provision of receipts or other proofs of purchase by the successful applicant to the [department/division/initiative], unless otherwise agreed upon by both parties.
3. That the money given, whether as reimbursement or by other agreed-upon means, only be used for expenses directly pertaining to the applicant's attendance of the [conference name], hosted by [host name and location].

Specifically, these expenses are limited to:

- a. Travel to and from the conference, including airfares, and/or petrol, and/or public transport, but not including public transport or other travel costs within the designated location of the conference.
- b. Conference registration.
- c. Accommodation for the duration of conference.

4. That the sum determined by the selection panel is the maximum subsidy that the above applicant is eligible to receive. In the event that the applicant does not spend that amount, or is unable to provide receipts or suitable proofs of purchase up to that amount, they will only be eligible to receive a subsidy up to the amount spent and evidenced by receipts or suitable proofs of purchase. In the event that the applicant spends more than the maximum subsidy allocated to them, they are not eligible to receive any subsidy beyond that maximum.

5. That the applicant will provide, within 1 month of the closing date of the Conference, a written report to the [*department/division/initiative*]. This report will detail the knowledge and skills gained by the applicant at the Conference, the activities undertaken by the applicant, and how this combination of knowledge, skills and activities undertaken can be used to improve or enhance the student experience for students at the University of Melbourne.

6. That in the event that the applicant fails to adhere to clause 5 (above) by providing a written report in a timely manner to the [*department/division/initiative*], UMSU Inc. they may forfeit eligibility for any future grants or subsidies from UMSU Inc.

7. That in the event that the applicant fails to adhere to clause 5 (above) by providing a written report in a timely manner to the [*department/division/initiative*], UMSU Inc. may seek to recover some or all of the subsidy given to them if this is applicable.

Applicant Signature: _____

Date:

UMSU Representative Signature: _____

Date:

Appendix 2:

Conference/Travel Event Report Template

University of Melbourne Student Union

Report of [*Name*] to [*Students' Council/Relevant Committee*]

[*Conference/Travel Event Name*]

Introduction of Event

A summary of what the event was about, who it was for and the logistical details of the event.

Knowledge and Skills gained

A dot point list of the knowledge and skills that were gained from the event.

Key Activities

A list of key activities attended and how that applied to your knowledge gain.

Implementation of knowledge in the University of Melbourne community

How can these experiences, skills and activities be used to improve or enhance the student experience?

Further Comments

Anything further you'd like to add.

Expenditure

Please fill out this table, the second row is an example.

Please attach photocopies of receipts and invoices to this report.

Item Description	Item Type and Supplier	Amount (\$)	Comment
Flights from Melbourne to Sydney return	Travel; Qantas	\$100.00	Travel date: 1/1/18 - 3/1/18