Lakehead University Faculty Association

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Expense Reimbursement Policy

Approved by the Executive on July 11, 2025

1. Purpose

a. The purpose of the Expense Reimbursement Policy (the 'Policy') is to establish guidelines for the reimbursement of reasonable and necessary expenses incurred by volunteers and employees of the Lakehead University Faculty Association ('LUFA'). The underlying principle of this Policy is that individuals should not be out-of-pocket for necessary expenses relating to LUFA business.

2. Scope

a. This Policy applies to all volunteers and employees of LUFA who incur expenses while conducting official LUFA business.

3. Travel Expenses

a. LUFA will reimburse volunteers and employees for reasonable and necessary expenses incurred in connection with LUFA business travel. These expenses may include, but are not limited to:

- Transportation (e.g., airfare, train fare, car rental, mileage)
- Lodging

- Meals
- Parking fees
- Conference fees
- Internet fees

b. Volunteers and employees are expected to exercise reasonable judgment and care in incurring expenses and should choose the most economical travel arrangements and suitable accommodations.

4. Approval Process

a. Volunteers and employees must obtain prior approval from the President for all business travel expenses, with exceptions. All requests for reimbursement must be submitted to the LUFA email (lufa@lakeheadu.ca) using the prescribed form with a copy of the original receipts and a description of the business purpose of the travel. If members are traveling on OCUFA business, all meal receipts must be retained and submitted to LUFA office for reimbursement.

b. Exceptions are as follows:
   (i) LUFA Officers appointed to OCUFA or CAUT representative positions do not need approval to attend CAUT and OCUFA meetings but are required to inform LUFA;
   (ii) CAUT's meetings include - CAUT Council, Forum for Presidents, Chief Negotiators, Chief Grievance Officers, and CAUT Advocacy;
   (iii) OCUFA's meetings include – Board of Directors meeting, Workshops for Chief Negotiators and Grievance officers, Status of Women meetings, Contract Faculty Members meetings, and OCUFA advocacy. **OCUFA pays 100% of the expenses** for one person for attending the above meetings.

5. Maximum Allowances

a. The following are the maximum allowances for the expenses that Volunteers and Employees can claim:
    - Transportation: Economy class airfare, train fare or car rental.
    - Lodging: Single occupancy at a standard hotel rate or equivalent.
    - Meals and Incidentals: Per Diem rates based on OCUFA's current posted rates.
    - Conference fees: The registration fee and a reasonable cost for travel to and from the conference.
    - Additional expenses: If a volunteer or employee is subject to unavoidable (e.g., flight cancellation, lost luggage etc.,) additional expenses for transportation, lodging, meals and incidentals, the person may apply to the President for reimbursement of the additional costs with accompanying receipts.

6. Other Expenses

a. Volunteers and Employees purchasing goods and services for LUFA business shall be reimbursed with the approval of the President or designate following the submission of related receipts.

7. Exceptions

a. Exceptions to these guidelines may be made only with the approval of the LUFA President or designate.

Next review: 5 years from the date of approval.