

Dunedin School of Medicine

Funding for Conference Travel & Joint Clinical CME

The Dunedin School of Medicine Heads of Departments ratified a Conference Financial Support Application Policy. Portions of this are detailed below.

Application Guidelines:

All applications from staff must be submitted through their Head of Department using the appropriate application form – for Academic and Research Only staff or for Joint Clinical Staff. Part-time staff who hold another appointment within the School, or the wider University must have approval from all the appropriate authorities.

Eligibility:

Conference travel funding is provided for the following members of staff:

- **Academic:** Lecturer and above, including Professional Practice Fellows, whose salaries are paid from the University block grant; or
- **Research Only:** Research Fellow and above. Research staff are expected to apply for conference funding as a component of their externally funded research grants. However, PBRF money contributes to the Conference Fund and therefore, where travel funding is not available elsewhere, applications can be made for the award of a grant; or
- **Joint Clinical:** All staff covered by the Joint Clinical Employment Agreement are entitled to a Continuing Medical Education (CME) allowance to attend conferences, professional meetings and visits to specialist and research facilities. Details of the agreement are available at the following link: <http://www.otago.ac.nz/humanresources/hr/employment/employment-conditions.php>.
- **Other Staff:** Applications from other members of staff and postgraduate students are regarded as a departmental responsibility and normally will not be considered.

Conference Leave Arrangements:

All staff must comply with the University of Otago Conference Leave policy - details are available at the following link: <http://www.otago.ac.nz/administration/policies/otago003114.html> Award of a travel grant does not signify approval of conference leave to attend the meeting. Application for leave must be made separately to the Head of Department and approved by the Dean. Departments are expected to keep records of all staff attending conferences, whether funded by the DSM Conference Travel fund or not, for Annual Report purposes.

It is the responsibility of the staff member concerned to make appropriate arrangements for the cover of teaching responsibilities and these must be approved by the Head of Department.

Leave entitlements:

Entitlements differ for Academic and Research staff, and Joint Clinical Staff.

- **Academic and Research staff:** there is no limit to the number of conference leave days beyond approval from the Head of Department and Dean.
- **Joint Clinical:** the entitlement is a maximum of 10 working days conference leave per year. Written agreement for the CME leave from the appropriate SDHB management is required for all applications. Additionally, as per the Joint Clinical Employment Agreement, staff who are travelling overseas on a flight of six hours or more, may request a maximum of two days travel time.

Financial Assistance Available:

It is recommended that staff consult with their Department Manager or appropriate person for advice when completing the application. If it is possible to partially finance the projected travel from other sources such as by a third party, this should be stated on the application. Only in exceptional circumstances will funding be granted for attendance at more than one international meeting in any calendar year. Staff should therefore think carefully about which meeting they regard as their highest priority.

- **Joint Clinical:** The total amount of funding available to each staff member is determined by their FTE and is detailed in the employment agreement. Details of annual allowances are sent to each staff member and their head of department at the beginning of each year. Access to CME is by application which can be made at any time. Written approval by the appropriate DHB management is required. All claims must be made through the Dunedin School of Medicine and the Department of the Dean will seek the appropriate reimbursement from the Southern District Health Board.
- **Academic and Research** – Conference attendance is split into Contributing and Not Contributing to conference. If a staff member applies for both categories in one year, the maximum funding available is the funding detailed under 'Contributing to conference'.
 - **Academic and Research – Not contributing to conference:** The maximum funding that will be awarded to an individual over the course of a year is \$3,000 for a full time employee. Part-time employees will be eligible for a 'pro-rata' amount. ie a 0.5 employee will be eligible for up to \$1,500. This is on the basis that the employee's other employer should contribute to conference costs. A staff member can accumulate these funds over two years to enable them to attend an international conference each other year.
 - **Academic and Research – Contributing to conference:** The maximum funding that will be awarded to an individual over the course of a year is \$6,000 for a full time employee. Part-time employees will be eligible for a 'pro-rata' amount. ie a 0.5 employee will be eligible for up to \$3,000. This is on the basis that the employee's other employer should contribute to conference costs. Consideration may be given to granting part time employees up to \$6,000, if they did not make an application in the previous year, or if they have no outside employment.

Contributing to conference: A staff member is contributing to a conference if they are:

- Giving a keynote presentation;
- Formally presenting their research at the Conference as either an oral presentation or a poster;
- Chairing a session at the Conference; or
- Part of a panel at the Conference.

Proof of submitting research to a conference is required at the time of application.

Expenditure Guidelines:

All travel must comply with the University of Otago Travel Policy – further details are available at the following link: <http://deptcons.otago.ac.nz/OtagoCorporate/administration/policies/otago003314.html?ssSourceSiteId=financialservives> It is recommended that staff discuss their travel and accommodation requirements with the appropriate member of staff in their department prior to application. Quotations for travel and registration may be attached to the application but are not required.

Airfares: All staff are required to use the University Mandatory Travel agents or AirNZ portal for travel arrangements. Airfares purchased on personal credit cards will not be reimbursed. Airport departure taxes are normally included in the airfare. It is University policy that Economy class must be used for all journeys.

Ground Transport: The cost of extended ground transport such as taxis, airport transfers, trains and buses may also be covered where this is required to travel to and from the conference and should be specified on the application and included in the travel expenses. The default amount is \$150 but if projected costs are greater, additional details and justification should be attached to the application form.

Sustenance Allowances: Sustenance should be calculated at the appropriate daily rate for each of the days attending the conference. For international travel staff may include one extra day. All conference related costs to be paid via PCard or to be claimed via reimbursement.

- **Academic and Research Only staff:** The standard daily sustenance rates for food and accommodation are: New Zealand NZ\$200 per day, Australia NZ\$260 per day and the rest of the world NZ\$300 per day.
- **Joint Clinical Staff:** The accommodation and sustenance rates should be estimates and the rates above can be used as a guide. Any claim for costs must comply with the University Travel Policy, the expenses must relate to the approved meeting or conference and the staff member must have sufficient CME funds.

Travel Insurance: All staff travelling internationally on official University business must have approved travel insurance. Travel insurance relating to any approved conference will be covered by a DSM Conference Travel Grant. For further information see the University FSD policy – details available at the following link <http://www.otago.ac.nz/financialservices/reference/travel/index.html>

Reimbursement: All reimbursements must be in accordance with the University of Otago policy and can only be authorised on production of original receipts and credit card statements if appropriate. EFTPOS receipts are **not** sufficient. Further information is available from the Financial Services Division website: <http://www.otago.ac.nz/administration/policies/otago003266.html>

Use of Personal Vehicle to travel to the Dunedin airport: Reimbursement of travel costs using personal vehicle to travel from your home to Dunedin Airport (return) will be restricted to a maximum of \$40 including mileage and car-parking. This is to ensure compliance with the University of Otago policy.