

Expenditure Guidelines 2022

Sciences expenditure guidelines now revert back to the Financial Delegations Policy and Procedures available [here](#) and the schedule of financial delegations [here](#). If you are unsure what approval is required, please enquire with your Finance Associate or Lead Administrator.

Expenditure requiring PVC approval:

1. For recruitment delegations and details – please refer to separate document ‘HR appointment schedule’ available on request from the Executive Assistant to the PVC.
2. All staff conference travel (via application through the OURDrive form – see below process).
3. International travel from 1 May 2022 (via application through the OURDrive form). International travel prior to 1 May is for exceptional circumstances only and the Vice-Chancellor’s approval is also required.
4. Capital expenditure over \$75k.

Details of Approvals Processes

- Travel for staff (excluding teaching-related) should be applied for through the Academic Conference, Study and Professional Attendance form in [OURDrive](#). As well as processing approval, this is a record of the travel. When requesting travel, please consider the following:
 - Staff are asked to consider the negative impact of increased emissions on climate change as integral to their decision to travel
 - A plan for work must be agreed between the traveller and approver to cover any possible disruption to travel plans
 - University travel insurance is required
 - The department/unit will be expected to cover any extra costs for University travellers not covered by the insurance and therefore the approver should carefully consider the relevant risks and whether the costs can be covered.
- If seeking divisional funding, PhD students are to complete the Conference Leave Application form found on the Science Division [website](#), which is to be approved by the Pro-Vice-Chancellor on the recommendation of the Head of School/Department.
- For sensitive expenditure requests (e.g. gift approval or event approval), apply using the relevant form on the [Sensitive expenditure web page](#).
- For all other requests where only HoD approval is required, apply to the HoD using department processes (normally email).
- For all other requests where PVC approval is required, email pvc.sciences.ea@otago.ac.nz, including endorsement from HoD and Finance Advisory.

Conference Leave

The following guidelines apply in conjunction with the Human Resources Conference Leave Policy (<http://www.otago.ac.nz/administration/policies/otago003114.html>).

All academic staff are eligible for conference **leave**. The following are eligible for **funding**:

Staff

- \$1,500 per year from 2022 onward for academic staff in permanent roles at Lecturer and above. Up to three years allocation (total \$4,500) can be used at one time to enable international conference attendance. Please be specific in the OURDrive form, what funding you are requesting and include codes and amounts for any alternative funding.
- Other academic staff may receive conference funding in exceptional circumstances.

Sciences PhD candidates:

- PhD students are eligible for up to \$2,000 over the course of their programme (not per year) for assistance to present a paper/poster at a conference.
- It is preferred that the candidate present at a conference before submission of their thesis, however if the student has submitted a thesis which is still under examination, they may apply for funding to attend a conference that takes place within six months of the date of the first submission of the thesis.
- Funding may be pro-rated based on their EFTS split. For example, a student who is supervised 80% with Sciences and 20% with Humanities would only be eligible for 80% of the \$2,000 from Sciences.

External funds and department strategic funds may also be used for staff and PhD student conference travel at HoD discretion.