

Policy for Payment of Symposium Expenses at Annual Conferences

Adopted by CSZ Council, December 9, 2000

Minor revisions May 21, 2009

Policy revision December 2009

Whereas the Canadian Society of Zoologists routinely sponsors symposia organized by the Local Organizing Committee and Sections of the Society at Annual General Meetings of the Society, the following guidelines are adopted regarding the payment of expenses by the Treasurer.

1. The base amount of symposium sponsorship, currently \$1800 per symposium plus 3 free registrations (for a 1-section symposium) or \$2700 plus 3 free registrations (for a joint symposium), is set by Council. These funds are raised by the Local Organizing Committee (LOC) via conference registration fees. These funds are intended to support the main section or LOC symposia only. [NOTE: Satellite symposia may be organized but can be funded only with section funds. The procedures for reimbursement for satellite symposia are otherwise similar to those outlined below.]
2. The LOC normally pays the LOC symposium expenses directly, but may elect to have the Treasurer do the reimbursements on their behalf, in accordance with this policy. Section symposium organizers shall forward to the Treasurer their request to reimburse their speakers, in accordance with this policy.
3. Symposium participants shall pay all expenses, obtain receipts, and submit their claim for reimbursement to the symposium organizer. [NOTE: Section symposium organizers should refrain from asking the LOC to make special financial arrangements for their speakers. The LOC is busy enough. If you have a speaker who wants their room costs paid up front, or needs an advance to cover airfare etc., direct these requests through the Treasurer.]
4. Symposium organizers can decide the items and amounts to be reimbursed in consultation with their speakers, keeping in mind that receipts must be provided except for the following two items: (1) meals, which can be reimbursed to the amount of receipts provided, or claimed to a maximum of \$15/day with no receipts required; (2) mileage for travel by personal automobile, at a rate of \$0.25/km. Symposium organizers shall not offer honoraria to speakers. [NOTE: It is important to be specific with potential speakers on the extent of reimbursement offered them. Do not offer vague statements such as, "we will cover all your costs." It would be better to say something like, "we currently have about \$800 per speaker to cover costs, but if that is a problem let's discuss it now." You want to treat speakers fairly, but in return you want to encourage them to be economical.]
5. Each symposium speaker shall submit to their symposium organizer their original receipts and mailing address, along with any special requests regarding payment.
6. Each symposium organizer shall gather receipts and required information and send the CSZ Treasurer one bundled request to issue payments (see Appendix A). This request will include the organizer's name and the name and date of the symposium. The request will also list the name, address, and amount to be paid to each speaker, and include sufficient receipts from each

individual to account for the amount of their reimbursement. [NOTE: If a speaker is requesting only partial reimbursement, because they wish to claim the balance from another source, have them send in their original receipt anyway. The Treasurer will make a copy, mark the original with the amount that has been reimbursed, and send the original back to the speaker.]

7. Upon receipt of a properly completed request, the CSZ Treasurer will issue reimbursement payments promptly.

8. Where the total amount of payments requested by a Section symposium exceeds the base amount authorized by Council, the symposium organizer (with approval of their Section Chair if a different person), can request the Treasurer to make the additional payments from the accounts of that section if sufficient funds exist. The Treasurer will assume that the Symposium organizer has approval from their Section to spend Section funds for this purpose.

9. While the LOC initially raises the symposium funds, the actual payment of symposium-related expenses may be done by the LOC out of its account, but preferentially by the Treasurer out of the Society account. When done by the Treasurer, this is considered to be a loan to the LOC and is ultimately repayable by the LOC out of the money collected from registration fees.

10. The goal of the Treasurer is to work with symposium organizers to make the expense-reimbursement process as simple and timely as possible, while maintaining proper accountability for the funds spent. If an organizer is unsure of anything, it is best to contact the Treasurer before proceeding.,

Appendix A

Sample request for CSZ Treasurer to reimburse symposium speakers.

Symposium: Extinct Biology Section Symposium, May 2008

Organizer: Jane Doe

Expenses for each speaker in this symposium, and the amounts they are to be reimbursed, are as follows. Receipts are enclosed

Speaker: Charles Darwin	
Address: 111-1st Street, Beagleville, Ontario, Canada M1A 1A1	
Meeting registration-	\$120.00
Airfare (receipt is for \$1000, only \$850 is being claimed)-	\$850.00
Accommodation-	\$200.00
Meals (receipts included)-	\$48.00
Total reimbursement requested	\$1218.00
Speaker: Aldous Huxley	
Address: 6 Smith Street, Corner Brook, Newfoundland A1E 2C4	
Meeting registration-	\$120.00
Travel by personal automobile (850 km @\$0.15)-	\$127.50
Meals (2 days @ \$15/diem)-	\$30.00
Total reimbursement requested	\$277.50
Speaker: Henry Baldwin Ward	
Address: Dept. of Zoology, University of Los Angeles, Los Angeles CA	
Accommodation-	\$200.00
Airfare (CDN\$ equivalent of US\$ 700)-	\$750.00
Total reimbursement requested (pay equivalent in \$US)	\$750.00
Total reimbursement for symposium	\$2,445.50

Please deduct the amount in excess of our symposium grant (\$445.50) from the accounts of the EB Section.

Signed, _____
(Symposium organizer)