University Policy
University Procedure
Operating Standard
Guideline/Form

Donations Expense Procedure

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Approval Authority Associate Vice-President (Finance)	
Implementation Authority Director, Supply Chain Management	
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1 Purpose

The purpose of this procedure is to outline:

a) the process by which out-of-pocket expenses associated with Donations are reimbursed to Employees; and
b) the specific requirements for approval of expenses associated with Donations.

2 Scope

The procedure applies to expenses associated with Donations.

3 Definitions

In this procedure:

a) "Donation" means a voluntary Gift given to a worthwhile cause.

b) "Employee" means an individual who is engaged to work for the University under a contract of service, that is, there is an employer-employee relationship between the individual and the University. For clarity, this term includes support staff, management and professional staff, the senior administration group, researchers, and faculty members.

c) "PI" means the principal investigator.

d) "University" means the University of Calgary.

4 Procedure

Reimbursement of Expenses

4.1 Employees may recover out-of-pocket expenses for Donations by submitting a completed and approved Expense Report.

Supporting Documentation

4.2 Detailed original receipts will be attached to support a claim for reimbursement of expenses or a request for payment of expenses.

4.3 If an original receipt has been lost, the Employee must provide sufficient detail to justify the expense.

4.4 The Employee will also include:

a) the reason for the Donation;
b) a charitable Donation receipt;
c) the charity's registration number;
d) a detailed description of the event;
e) any other supporting material; and
f) evidence of prior approval.

Approval

4.5 The Authorized Approver will review the expense to ensure it is:

a) permitted under the terms and conditions of the Gifts, Donations and Sponsorship Policy; and
b) properly documented.

4.6 If the conditions under 4.5 have been satisfied, the Authorized Approver will approve the expense.

4.7 When the expense is funded from a research trust account, the following approvals are also required:

a) the Employee; and
b) the PI when the Employee is not the PI; or
c) the department head/dean when the Employee is the PI.

Submission of Expense Reports

4.8 Once the necessary approval has been obtained, the Employee will submit the expense report with receipts and any other supporting documentation to Accounts Payable at Physical Plant 65 except under circumstances described at 4.9 and 4.10 below.

4.9 For expenses relating to research and trust projects using Fund 60 in the Faculties of Arts, Medicine, Veterinary Medicine, and Science, and the Schulich School of Engineering, the Employee will submit the expense report with receipts and any other supporting documentation to the research fund analyst at the following location:

a) Arts: SS 548
b) Engineering: CCIT 210
c) Medicine: TRW 5th floor
d) Science: BI 570
e) Veterinary Medicine: TRW 5th floor

4.10 For expenses relating to the Faculty of Nursing – Qatar, the claimant will submit the expense report with receipts and any other supporting documentation to Accounts Payable, room G12.

5	**Parent Policy**	Gifts, Donations and Sponsorship Policy	
6	**Related Procedures**	Gifts Expense Procedure Sponsorship Expense Procedure	
7	**Related Information**	https://www.ucalgary.ca/finance/	
8	**History**	September 15, 2011	Approved and Effective.
		January 1, 2020	Editorial Revision. Updated format and links.