

INGHAM ISD

TITLE: CONFERENCE AND TRAVEL PROCEDURE

- 1.0 OBJECTIVE:** To establish and maintain district procedure for conferences and travel, including pre-approval of conferences and the definition of allowable district conference and meeting travel expenses.
- 2.0 SCOPE:** Ingham ISD – All Staff
- 3.0 DEFINITIONS:** The term “conferences” includes workshops, seminars, in-services and conventions related to district business or district-related professional development. Meetings are defined as related to district business. This procedure applies to both “conferences” and meetings.
- 4.0 ASSOCIATED DOCUMENTS:**
Exhibit “A”: Conference and Travel Expense Flowchart
Exhibit “B”: Definition of Allowable Expenses
Exhibit “C”: Pre-approval of Conference Form
Exhibit “D”: Employee Expense Reimbursement Form
- 5.0 RESPONSIBILITY:** It is the responsibility of Cabinet to develop this procedure and ensure that the procedure is communicated to staff.
- 6.0 PROCEDURE:**
- 6.1 Pre-approval of conference attendance and estimated expense.
- 6.1.1 If no overnight stay is required, staff verifies that budget is available and is consistent with any contract provisions, then submits requisition for registration fee to supervisor.
- 6.1.2 If an overnight stay is required, staff completes Conference Pre-approval form, including estimated expenses and verifies that budget is available and is consistent with any contract provisions.
- 6.1.3 Staff submits Conference Pre-approval form to their supervisor.
- 6.1.4 Supervisor reviews Conference Pre-approval form (when overnight stay) or requisition (if no overnight stay) for alignment with department/program goals, alignment with individual staff professional development plan, availability of budget and if consistent with any contract provisions.
- 6.1.5 Supervisor approves or disapproves request and returns form to staff member.

- 6.2 Staff follows department/program process for initiating needed requisitions for conference registration, lodging and travel arrangements, and follows district Purchasing process. Staff arranges for leave time.
 - 6.2.1 Arrangements for registration fee, hotel, air travel and car rental should be made by the department through the District's Purchasing process and a purchase order will be issued for direct payment by the District. No sales tax should be paid on lodging in the State of Michigan
 - 6.2.2 The employee should pay for meals and taxis and submit allowed expenses in these categories after the conference.
 - 6.2.3 All expenses related to conference attendance, including registration, hotel and travel should be charged to object code "3220" in the appropriate program. Note: mileage to a conference is charged to "3220" and not to "3210" local travel.
 - 6.2.4 Staff completes leave form for date(s) absent from work for conference attendance and submit to supervisor.

- 6.3 After conference attendance, staff submits on Employee Expense form, Exhibit "D", expenses incurred by the employee that are defined as allowable per Exhibit "B".
 - 6.3.1 Original detailed receipts are required for all conference related expenses. This includes receipts for district paid expenses such as hotel, and employee paid expenses such as meals. A credit card receipt without a detailed breakdown of the expenses is not acceptable.
 - 6.3.2 The documentation must include the name(s) of the IISD employee(s) or business guest, and the business purpose.
 - 6.3.3 If any non-allowed expenses such as spouse of alcohol are included in the receipt, a deduction must be made which includes the related taxes and tip related to the non-allowed expenses.
 - 6.3.4 The Conference Pre-Approval form should be attached to the Employee Expense Reimbursement form if applicable (when overnight stay), and submitted to supervisor with original receipts.

6.3.5 Supervisor reviews expenses to ensure only allowed expenses are paid by district or reimbursed to employee by district. Supervisor verifies no tax is reimbursed on lodging in the State of Michigan.

7.0 PROCEDURE RECORD:

Record	Date	Description
Original	7/1/03	

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EXHIBIT "B": Definition of Allowable Expenses

1. Registration Fees

- a. Conference registration fees are allowable and should be made through district Purchasing procedures.
- b. Non-allowable: The district will not cover the conference expenses related to events and activities for spouse or other non-employee.

2. Lodging

- a. The cost of lodging is allowable, if the conference/meeting is overnight or if the distance would require an overnight stay to provide for adequate rest to perform job duties.
- b. Lodging rooms should be single rate.
- c. Lodging arrangements should be made through district Purchasing procedures. A detailed receipt should be obtained and submitted with other conference/meeting expense reimbursement.
- d. Room sharing is encouraged whenever possible, if more than one employee travels to same conference.
- e. If the other occupant(s) who shares a room is not an employee, the employee is responsible for the additional cost. The purchase order and receipt should note the single rate cost for the district. The employee should attach a check for the additional costs of other occupants payable to Ingham ISD or payable directly to the hotel when submitting the requisition for hotel arrangements.
- f. The district will cover the cost for hotel charges for items such as fax, Internet and copies that are documented and related to business purpose.
- g. Non-allowable: The district will not cover the cost of tips for doormen/baggage handling or room cleaning, personal phone calls, movies, mini-bar, laundry services, fitness facility, or other personal-type hotel charges.

3. Meals

- a. The district will reimburse the actual cost of meals (food, non-alcoholic beverages, taxes and tips (not to exceed 20%), related to attendance at an overnight conference/meeting, but the reimbursement will not exceed the per diem rate. The only exception to this limitation is the actual cost of conference banquet rickets.
- b. The per diem reimbursement limit is based on a three-tier reimbursement depending on the city size, per the federal GSA rates (Exhibit B)

Per Diem	High cost cities	Regular cities
Breakfast		
Lunch		
Dinner		

- c. Detailed receipts are required for all meal reimbursement. A credit card receipt with total only is not sufficient. Documentation must include the names of the IISD employee(s) or business guest and the business purpose.
- d. Non-allowable: Reimbursement will not be made for meals not related to an overnight conference/meeting, except when attendance at a meal necessary for participation in a conference/meeting. The district will not cover the cost and related taxes and tips for of the purchase of alcoholic beverages and spouse/non-employee meals.

4. Transportation to Conference

- a. Determination of air or car travel to the conference/meeting:

District cost will be based on the most economical means for the ISD, taking the employee’s time into consideration.

The authorizing department should determine the lowest cost alternative by comparing the total cost between, (1) private car, including mileage, meals and lodging en route, and (2) air travel, including the lowest available discount airfare and transportation to the airport and parking. This must be documented.

If more than one person is traveling from the district then that will be considered in calculation the least costly method to the district.

If travel to a conference or other school district business is combined with vacation or other leave, the amount reimbursed shall be based on

the mileage to the conference site of location of the school district business via the most public direct road, and the amount reimbursed will not exceed the cost of economy airfare to the same destination. This must be documented.

b. Air travel to Conference

1. Air travel should be arranged and paid for by the district and not directly by the employee.
2. Air travel must be at the lowest logical (considering cost and time) available airfare, which is defined as travel (1) in economy class unless it is not available and (2) via the most logical and efficient route taking into consideration the business traveler's objective and airline penalties and restrictions.
3. Travel may be on weekends, utilizing excursion fares, if the cost savings for the fare exceeds the additional lodging and per diem costs. This must be documented.
4. For transportation to the airport, the district will cover the cost for the lesser of (1) private car mileage and parking, or (2) limousine/taxi service to the airport.
5. Promotional items, such as frequent flyer miles, tickets or other items offered because of "bumping" etc., are the property of the district and must not be used for personal benefit, when acquired through travel at district expense.
6. Non-allowable: The district will not cover the cost of spouse/non-employee air travel.

c. Private Car travel to Conference

1. If travel by private automobile is authorized, the amount reimbursed will not exceed the cost of economy airfare to the same destination, plus the cost of transportation to the airport and parking. This must be documented.
2. Employees are encouraged to drive together on authorized travel.
3. Reimbursement will be made at the standard IRS mileage rate, and with receipts, actual parking fees and tolls directly related to the conference/meeting purpose.
4. Non-allowable: Expenses for gasoline, repairs, towing etc. are included in the standard mileage rate and are not reimbursed separately. The district does not cover mileage, parking, tolls etc. related to sightseeing, entertainment and other personal activities.

5. Car Rental

- a. The use of a rental car may be necessary under certain, limited, circumstances.
- b. If ground transportation is only required to travel between the airport and the conference location, employees must inquire into the availability of taxi or hotel shuttle, as these services are available at most airports.
- c. The business purpose for use of rental car must be clearly documented.
- d. When rental cars are deemed necessary for a business purpose, the district will cover the cost of mid-size or smaller vehicles and conference/business related parking and tolls.
- e. Non-allowable: The district will not cover the cost of rental vehicle rented for the purpose of sightseeing, entertainment, travel to/from restaurants for meals which are not directly related to the conference/meeting purpose, or other personal activities.

The district will not cover the cost of Collision Damage Waiver (CDW) or Loss Damage Waiver (LDW) offered by the rental company. Employees should review their personal auto insurance policy for coverage of CDW/LDW for rental vehicles, and if they do not have coverage consider purchasing at employee's expense from the car rental company.

6. Taxi

- a. Taxi service expenses and tips (not to exceed 20%) are allowable for travel related to the conference/meeting purpose. For example taxis between hotel and airport are allowable.
- b. Not-allowable: The district does not cover the cost of taxis for sightseeing, entertainment, trips to/from restaurants for meals which are not directly related to the conference/meeting purpose, or other personal activities.

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EXHIBIT "C": Pre-approval of Conference Form

This pre-approval form for conference/meetings is required if an overnight stay is involved.

Name: _____ Date of Conference/Meeting: _____

Description of conference/meeting:-

Attach copy of registration information/flyer

Location of conference/meeting: _____

Describe how this conference/meeting aligns with department/program goals and individual professional development plan.

Estimated conference/meeting cost:

1. Registration fees	_____	
2. Lodging	_____	max. single rate
3. Meals	_____	actual to per diem limit
4. Transportation to conference/meeting	_____	document lowest cost
a. Air, or	_____	
b. Private car	_____	
5. Car Rental	_____	note business purpose
6. Taxi	_____	
	Total	=====

Budget availability verified: _____ Account number: __ - ____ -3220

Contract compliance verified: yes, n/a

Submitted by: _____ Date: _____

Supervisor verification and approval: _____ Date: _____