

# F-3: Administrative Procedures

## Conference Attendance and Travel

### Expense Reimbursement



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#### REFERENCES

- [Board Policy F-3](#)
- [Travel Allowance Request Form](#)

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#### PROCEDURES FOR IMPLEMENTATION

##### I. Conference Selection

- A. In order to minimize expenses, every effort should be made to select professional development opportunities offered geographically close to Salt Lake City, and that align with district and school goals.
- B. In providing employees with professional development opportunities, the district will consider an orderly rotation for conference participants.
- C. Priority consideration will be given to those employees with leadership responsibilities and who are in positions to provide post-conference training to other district personnel. Priority will also be given to those employees elected/appointed to national offices, or who have been invited to participate and/or present at a particular conference by the conference's planning committee.

##### II. Travel Request

- A. Before completing any other steps, the following travel requests must be pre-approved by the superintendent and cabinet:
  - 1. all out of state employee travel;
  - 2. all last minute or unusual travel requests even if the travel is within the state of Utah; and
- B. Employees seeking to travel out-of-state must complete a Pre-approval for Conference with Travel form.
  - 1. The form must be submitted to the appropriate cabinet member (i.e. the business administrator or executive director) in the employee's supervisory chain.
  - 2. The cabinet member will present the request to the superintendent and the rest of cabinet at the next scheduled cabinet meeting.
  - 3. If the request is approved, the employee must comply with the remainder of these administrative procedures.
- C. All travel requests, both in and out of state, must include a completed Travel Allowance Request form, copies of conference registration information and a conference itinerary.
  - 1. Prior to travel, the traveler must opt to either receive travel expenses in advance of travel, or be reimbursed after travel has occurred.
  - 2. Travel expenses paid in advance will only include:
    - a. \$42.00 for ground transportation charges (see, Section XI below); and
    - b. daily per diem (see, Section VIII below).
  - 3. Reimbursed travel expenses will include:
    - a. certain transportation and parking charges (see, Section XI below);
    - b. costs associated with checking one piece of luggage, excluding any over-weight fees; and
    - c. daily per diem (receipts are not required for per diem items, see Section VIII below).
  - 4. Employees are responsible for paying all expenses related to extending their business travel into a personal vacation, including any increase in airfare due to extended travel dates.
- D. Travel requests, including all required documentation, should be submitted to the traveler's supervisor no less than thirty (30) days in advance of departure. Failure to provide the requisite advance notice may result in the travel request being denied.
- E. Requests will be reviewed and approved by the traveler's supervisor, then submitted to the appropriate budget administrator for final approval. All travel requests must be approved by either the business administrator, superintendent, or cabinet member.
- F. Once a travel request has been approved and air travel arrangements have been completed, any costs associated with cancelling or changing travel arrangements must be paid by the employee.
  - 1. Employees will be responsible for paying such costs either out-of-pocket or through payroll deduction.

**IV. Teachers and Classified Employees**

- A. Teachers and classified employees will submit requests for conference participation to their school principal or program director/supervisor. Conferences for non-exempt employees that require travel to another city and overnight lodging should be authorized by the business administrator, or his/her designee, prior to any travel arrangements being made.
- B. Conference attendance and/or travel will be rotated among teachers and classified employees so that representatives of all subject areas receive equal consideration to participate in professional development opportunities.
- C. Travel requests for career technology education (CTE) teachers will be reviewed and approved by the CTE director.
- D. Teachers and classified employees are highly discouraged from attending conferences or traveling while students are in school. Exceptions may be authorized on rare occasions by the principal or program director/supervisor in consultation with the superintendent and cabinet, and only if the available funding will cover costs for both the conference/travel and the substitute teacher.

**V. Hourly Employees**

Hourly employees are not allowed to participate in out of state or overnight travel except in extremely rare instances. Requests for exceptions to this prohibition must be presented to and approved by the superintendent and cabinet.

**VI. School-based Administrators**

- A. Principals and assistant principals may be authorized to attend a national conference on a rotating basis.
  - 1. Additional travel may be authorized by the superintendent, or his/her designee, and only if there is sufficient funding in the school or department budget.
  - 2. The school leadership and performance department will maintain the rotation schedule for principals and assistant principals.
- B. School administrators are encouraged to attend conferences that will facilitate professional growth and achievement of the school's improvement plans and goals.
- C. Principals and assistant principals may also attend other in-state conferences as approved by the superintendent, or his/her designee.
- D. Assistant principals may attend in-state conferences as approved by their principal.
- E. Principals and assistant principals are discouraged from travel while students are in school.
- F. Principal's and assistant principal's travel should not exceed one national conference per year.
- G. Principal's travel will be approved by the superintendent, or his/her designee.
- H. The principal and assistant principal working in the same school will not generally be permitted to attend conferences at the same time, unless approved by the superintendent, or his/her designee.

**VII. District-based Administrators**

- A. Supervisors and coordinators may be authorized to attend one national conference each year based on needs of the district or department. Exceptions may be authorized by the superintendent, and in accordance with department budgets.
  - 1. Supervisors and coordinators may also attend other in-state conferences as approved by the superintendent, or his/her designee, if sufficient funding is available in the department budget.
- B. Executive directors/directors may be authorized to attend one national conference each year. Additional travel may be authorized by the superintendent, or his/her designee.
  - 1. Executive directors/directors may also attend other in-state conferences as approved by the superintendent, or his/her designee, if sufficient funding is available in the department budget.

**VIII. Board Members**

- A. Board members may elect to attend state and/or national conventions.
  - 1. Participation at such conventions shall involve prior advisement and be within budget authorization.
- B. Board travel requests shall be discussed and approved at a board meeting prior to the conference and/or convention.
- C. Travel arrangements shall be coordinated through the business office.
  - 1. Board members will be provided with the appropriate per diem in advance of travel in order to cover costs of meals and incidentals.
  - 2. Expenses for such activities shall include travel, registration, food, and lodging.

**IX. Meals and Incidental Expenses Per Diem (M&IE)**

- A. Employees authorized by the district to travel to workshops, conventions, conferences, etc., will be permitted to claim an M&IE. It is not necessary for the traveler to submit receipts to receive the M&IE. The M&IE rates eliminate personal tax liability issues and eliminate the need for the employee to substantiate the expenses covered by the M&IE allowance. The M&IE rates are based on the federal per diem rate. In cases where travel includes a time period of less than a full 24-hours, or in cases where conference registration fees pay for some meals or expenses, the M&IE rate is prorated as follows:

Breakfast	17% of M&IE rate
Lunch	23% of M&IE rate
Dinner	60% of M&IE rate

- B. Departures from Salt Lake City:
  - 1. Breakfast can be reimbursed when the traveler:
    - a. takes a flight that is leaving before 9:01 a.m.; or
    - b. if driving, departs before 8:01 a.m.
  - 2. Lunch can be reimbursed when the traveler:
    - a. takes a flight leaving before 2:01 p.m.; or
    - b. if driving, departs prior to 1:01 p.m.
  - 3. Dinner can be reimbursed when the traveler departs between 5:00 – 10:00 p.m. regardless of the mode of transportation. Travelers leaving Salt Lake City after 10:00 p.m. are expected to eat before their departure, and will not be reimbursed for dinner.
- C. Arrivals back to Salt Lake City, regardless of the mode of transportation:
  - 1. Breakfast can be reimbursed to a traveler returning after 7:00 a.m. Travelers returning before 7:00 a.m. are expected to eat after arrival.
  - 2. Lunch can be reimbursed to a traveler returning at 12:00 p.m. or later.
  - 3. Dinner can be reimbursed to a traveler returning at 5:00 p.m. or later.

**IX. Airline Reservations or Reimbursement**

- A. The district prefers authorized district staff to make airfare reservations for travelers through Christopherson Business Travel (State Travel), using a district credit card account. State travel charges a \$25.00 processing fee per ticket, which is paid by the district.
  - 1. In the event the traveler wishes to pay for airline tickets personally, the traveler must contact the business administration department to obtain advance approval. However, reimbursement will be limited to the lowest published airfare to such location. A copy of the published fare and the ticket invoice must be supplied in support of the expense reimbursement claim.

**X. Mileage Reimbursement**

- A. Employees who use their personal vehicles for district business must have successfully completed the State approved on-line driver safety program/defensive driving course in order to receive mileage reimbursement.
  - 1. For information on creating an account and accessing the course, please click [here](#).
  - 2. Employees will receive a certificate of completion via email once they have successfully completed the course.
    - a. This certificate of completion must be forwarded to Liz Baldwin in the business administration office at [liz.baldwin@slcschools.org](mailto:liz.baldwin@slcschools.org)
    - b. This certificate is valid for two years; employees must retake the course upon the expiration of their certificate.
- B. The District will reimburse employees for miles driven for business purposes. Miles driven from an employee's home to his/her primary worksite are considered commuting miles and are not reimbursable.
- C. Employees using a private vehicle to travel to locations not serviced by a regular airline will be reimbursed at the approved United States Internal Revenue Service (IRS) mileage rate for the number of miles based on the most direct regular highway route to the destination. When a district owned vehicle is used, no other form of transportation reimbursement will be paid.
- D. If a traveler chooses to drive to a conference in a city serviced by regular commercial airlines, the district will determine which method of transportation would have been the most economical, based on comparing the lowest published airfare to the conference location to the IRS mileage rate calculation, and the traveler will be reimbursed for the lesser amount.

**XI. Ground Transportation**

- A. When traveling out of town by plane, travelers must select one of the following two options in advance when completing the Travel Allowance Request Form:
  - 1. advance payment of \$42 for ground transportation and/or parking charges; or
  - 2. reimbursement after travel for allowable ground transportation and parking expenses when submitted with receipts.
    - a. If not included with conference attendance, allowable transportation and parking expenses are:
      - i. transportation to/from airport and home, or long-term economy parking at the airport;
      - ii. transportation to/from the airport and hotel; and
      - iii. transportation to/from the conference.
- B. The following are not allowable transportation expenses:
  - 1. car rental (unless specifically approved in advance), or
  - 2. taxicab service to and from any site not required to fully participate in the conference.
- C. If an employee is renting a car in conjunction with district business, the employee must successfully complete the State approved on-line driver safety program/defensive driving course outlined in Section X.

**XII. Lodging**

- A. The district will pay the actual lodging cost of the conference hotel directly to the hotel. The traveler will be required to make the reservation, and request a "Credit Card Authorization Form" from the conference hotel. The traveler will send a copy of the reservation and the Credit Card Authorization Form to the business administration department. The business administration department will complete the form, authorizing payment by the district, and submit it directly to the hotel.
  - 1. If a traveler wishes to pay the lodging costs personally, the traveler must contact the business administration department to obtain advance approval. However, the district will reimburse only the actual cost per night plus tax, not to exceed the federal lodging rate for the location. A proper receipt for lodging accommodations must accompany any request for reimbursement.
- B. The district will not pay for any incidental or miscellaneous hotel charges made by the traveler, e.g. movies, phone calls, etc.
- C. The district discourages the use of time-shares, house rentals, and bed and breakfasts as lodging options.

**XIII. District Vehicles**

- A. Employees must successfully complete the State approved online driver safety program/defensive driving course outlined in Section X above prior to driving any district vehicle.
- B. District-owned vehicles shall be returned to designated storage on district premises at the end of each work day except for vehicles which are still in use for out-of-town travel and vehicles assigned to on-call alarm respondents that are used for 24-hour emergency calls.

**XIV. Superintendent Approval**

The superintendent's approval is required for all out-of-town travel beyond the scope of these procedures. Under special circumstances, the superintendent may allow exceptions or adjustments to any or all of these procedures.