



CONFERENCE/WORKSHOP REQUEST  
AND REIMBURSEMENT CLAIM PROCEDURE

**GUIDELINES**

1. **Out-of-State travel must be approved by the Board in advance of travel.**
2. Conference/Workshop Request Form must be submitted at least three weeks prior to the conference/workshop. Attach a copy of the conference flyer to your request.
3. Complete the estimated costs and have the Request Form signed by the supervisor and program manager.
4. Keep the approved request form to submit with your reimbursement after the conference.
5. Requests must be aligned and relevant to the District's LCAP and/or school site/SPSA goals.

**Approved conference expenditures:**

1. Conference registration
2. Membership that reduces the overall cost of the conference
3. Hotel accommodations for conference days only, outside of Santa Clara County only
4. Business related phone calls
5. Parking fees at conference and/or hotel, Uber, car rental
6. Mileage at the IRS rate, attach Mapquest or similar proof of mileage. When traveling within California, the District will only pay for the least expensive alternative.
7. Airline tickets
8. Bridge tolls
9. Actual meals within the per diem rates, itemized receipts required
10. Instructional materials purchased at the conference, with prior supervisor approval

**Unapproved expenditures:**

1. Conference sight-seeing trips or entertainment costs
2. Additional conference costs for spouses or others
3. Meal expenditures in excess of the allowance. Meals are not claimable if they are provided as part of the conference.
4. Luxury accommodations
5. Personal expenditures (i.e., phone calls home, video rentals, etc.)
6. Valet parking
7. Alcohol
8. Non-itemized or credit card receipts
9. Room service without itemized receipt

**After travel:**

1. Upon return from travel, complete the "Conference/Workshop Reimbursement Claim" form and submit to Supervisor for approval.
2. After the Reimbursement Claim is approved, submit the original to the Business Dept.
3. Original receipts must be included - please tape to an 8 ½ X 11 sheet of paper.