

# 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. Employees should not select conferences that are being held outside of the contiguous United States, as such travel requests will not be approved.
- B. An employee may not select a conference that would conflict with the employee's attendance at a required district-level training/professional development.
- C. In order to minimize expenses, every effort should be made to select professional development opportunities offered in locations that are geographically close to Salt Lake City, and that align with board, district and school goals.
- D. 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 Approval Process

- A. All overnight employee travel requests must initially be pre-approved by the superintendent and cabinet.
- B. Employees seeking to travel overnight 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 applicable cabinet member will present the request to the superintendent and the rest of cabinet at the next scheduled cabinet meeting.
    - a. Cabinet members will either present their own travel requests during the cabinet meeting or ask the business administrator to do so.
  - 3. If the request is approved by the business administrator and superintendent, the employee must comply with the remainder of these administrative procedures.
- C. All travel requests, including all required documentation, should be submitted to the traveler's supervisor no less than thirty days in advance of departure. Failure to provide the requisite advance notice may result in the travel request being denied.
- D. Requests will be reviewed and approved by the traveler's supervisor, then submitted to the appropriate budget administrator for approval.
- E. 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. \$60.00 for ground transportation charges (see, Section XI below); and
    - b. daily per diem (see, Section IX 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 IX 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.
- 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.

**III. Teachers and Classified Employees**

- A. Teachers and classified employees will submit requests for conference participation, including those that do not require travel, to their school principal or program director/supervisor.
- 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.

**IV. 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.

**V. School-based Administrators**

- A. In accordance with a rotation schedule set by the school leadership and performance department, principals' and assistant principals' attendance at a national conference will be funded by the district's travel budget (as opposed to an individual school's budget).
  - 1. Additional travel may be authorized in accordance with the standard approval process if there is sufficient funding in the requesting school's budget.
- 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 are discouraged from travelling while school is in session.
- D. A 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.

**VI. District-based Administrators**

- A. District-based administrators may be authorized to attend one national conference each year based on the needs of the district or department.
  - 1. District-based administrators may also attend other conferences if approval is granted through the standard approval process and sufficient funding is available in the department budget.

**VII. 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.

**VIII. 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 2:00 p.m. or later.
  - 3. Dinner can be reimbursed to a traveler returning at 7:00 p.m. or later.

**IX. Airline Reservations or Reimbursement**

- A. District employees must make travelers' airline reservations through Christopherson Business Travel (State Travel), using a district credit card account. State travel charges a \$26.00 processing fee per ticket, which will be paid from the appropriate budget.
  - 1. Travelers will not be reimbursed for tickets that they personally purchase.
- B. Airline reservations for approved district travel require round-trip tickets from Salt Lake City to the conference location and back to Salt Lake City.
  - 1. Airline travel to other locations from the conference location to accommodate personal travel plans will not be approved.
  - 2. In rare circumstances, the business administrator may approve an exception to this requirement.
    - a. All requested exceptions must be made in writing to the business administrator and be accompanied by supportive documentation from the employee's supervisor.
    - b. If an exception is approved, the employee will be responsible for paying any additional costs associated with the requested airfare.

**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 mileage reimbursement will be paid.
- D. If an employee 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 employee will be reimbursed for the lesser amount.

**XI. Ground Transportation**

- A. When traveling out of town by plane, employees must select one of the following two options in advance when completing the Travel Allowance Request Form:
  - 1. advance payment of \$60.00 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 employee will be required to make the reservation and request a "Credit Card Authorization Form" from the conference hotel. The employee 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. Employees will not be reimbursed if they choose to pay the lodging costs personally.
  - 2. If an employee wishes to extend their stay at a location beyond that which is a business necessity, the employee must make a separate reservation to cover the additional time period.
- B. The district will not pay for any incidental or miscellaneous hotel charges incurred by the employee, e.g., movies, phone calls, etc.
- C. The district prohibits 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 workday 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. Exceptional Circumstances**

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