



# CONFERENCE GUIDELINES

A “**Request to Attend Conference**” (P-29) should be completed for each individual who wishes to attend a conference, workshop, or training even if there is no cost to the district.

If the total amount exceeds **\$500.00** or is **out of state**, the conference must be **board approved** before the date of the conference.

All conference requests are to be sent to Educational Services for processing.

## ATTENDEE INFORMATION

All areas must be completed for each person attending the conference. The attendee must sign the conference request.

## BUDGET INFORMATION

- Please list the entire *budget number* (funding source) and the *program name* (Title I, At Risk, etc.).
- The *budget approval* is the administrator of the program. This is the principal if it is a school site budget. If not, a program administrator at the district office will approve the budget being used once it is received by Educational Services.
- *Supervisor approval* is the direct supervisor of each attendee. This must be signed prior to submitting the request.

## CONFERENCE INFORMATION

- Please enter the *Full Name of the Conference* as it appears on the brochure. Acronyms are not acceptable. A copy of the brochure must be attached to the conference request.
- The *Location* is the city and state in which the conference is held. Any out-of-state conference must have prior approval from the Westminster School District Board of Trustees. If the conference is out-of-state, please submit the paperwork promptly especially if conference registration is to be paid for at the time of registering or you are requesting an advance since processing cannot occur until after it is board approved.
- The *Dates of Attendance* are the actual dates of the conference.

## CHECK ALL ESTIMATED EXPENSES YOU EXPECT TO INCUR

**\*\*\* Itemized receipts are mandatory for all expenses and must be signed by the attendee\*\*\***

- a. Enter the total *registration cost* of the conference or meeting
- b. *Travel expenses*
  - Mileage – you can be reimbursed for mileage from your school site or your home, whichever is less. Mileage can be claimed on a quarterly mileage log. Mileage is reimbursed at the standard IRS mileage business rate. Use Google maps to determine the number of miles.
  - Parking – estimate the approximate cost of parking each day of the conference (**be sure to get a receipt for reimbursement on your expense claim**)
  - Car Rental – estimate the approximate cost of renting a car, if necessary.
  - Shuttle/Taxi – estimate the cost of taxi or shuttle service (be sure to get a receipt for reimbursement on your expense claim)
  - Airfare – If you have made your own airline reservation, enter the actual cost. Keep your confirmation/receipt showing it was paid for and submit it for reimbursement on your expense claim.
- c. *Lodging* – After making your hotel reservations, please enter the cost of your lodging for the length of your stay. Be sure to ask the hotel what your total bill will be including tax and any other hotel fees.
- d. *Meals* – If you are attending a **local** conference and lunch is not provided, you may submit an **itemized receipt** for your lunch only. Breakfast and dinner meals will not be reimbursed for local conferences, workshops, or trainings. If you will be claiming meals for a conference that is not local, you must have an itemized receipt in order to claim the expense.

**If you do not have an itemized receipt, you will not be reimbursed.**

- Enter the approximate cost of your meals while at the conference. Meals, after you have returned home, will not be reimbursed. You will not be reimbursed for alcohol. The following are WSD meal allowance guidelines:

Breakfast \$25.00

Lunch \$25.00

Dinner \$40.00

- Tips – 18% gratuity may be included (written amount acceptable). The total amount to be reimbursed may not exceed the amounts listed above.
  - If the conference provides a meal (continental breakfast or lunch), and you prefer to eat elsewhere, you may not turn in a receipt for that meal.
  - Receipts for meals **must be itemized** and for the individual attendee only. Credit card receipts will not be accepted. All receipts being submitted for reimbursement **must be signed**. Please do not share receipts for meals.
- e. *Other* – Additional workshops, breakout sessions, etc. not included in conference registration.
- f. **Substitute** – If a substitute is required, please email the [Attendance Technician](#) with the following information: Date(s) of conference, time frame sub will be needed, and a budget #. The budget number should be listed on your P29.

### PROCESSING INFORMATION

Please read and check the appropriate box for each line item indicating that you have completed that item.

#### Conference Registration

- Please make your own conference registration or have your Office Manager make it for you. The district does not make conference registrations.
- Please attached a completed copy of the registration to your conference request along with a brochure. Please be sure there is a PR or PO # on your request indicating how the registration was paid for.
- You can pay for it yourself and be reimbursed or have the district pay for your registration with a PO or check. If the district will be paying, the registration will need to be entered into Business PLUS and the PR # entered on the conference request and completed registration form.
- If the vendor will only accept a PO when registering, please indicate that on the Business PLUS request. Call Rob Conlin in Purchasing to get a PO # to complete the registration online. Put PO# on the completed registration form and send a copy to Accounting to send along with a hard copy of the PO.
- If the vendor will only accept a check when registering, please indicate that on the Business PLUS request. Send Accounting a copy of the completed registration form to send along with the check.

#### Travel and Lodging

- Please make your own travel and lodging arrangements. These expenses should be claimed on an Expense Claim form at the end of your conference. Please be sure to sign your receipts.

#### Expenses for Reimbursement

- Your conference expenses cannot **exceed** the estimated costs on your conference request. That is why it is advisable to estimate on the high side so any unexpected taxes or fees are covered.
- Expense claims with signed receipts must be received by Educational Services no later than **10 days** after the last date of your conference. Your expense claim may be denied if turned in late.

#### Board Approval

- Conference totals that exceed **\$500.00 per person, or are out of state**, must be board approved before the date of the conference. Your conference request must be received by Educational Services 4 weeks prior to the board meeting.
- If your conference request is less than \$499.00, it must be received by Educational Services at least 20 days in advance of the conference for processing.

After your conference, you must submit an Expense Claim with signed itemized receipts within **10 days** to Educational Services for processing.

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