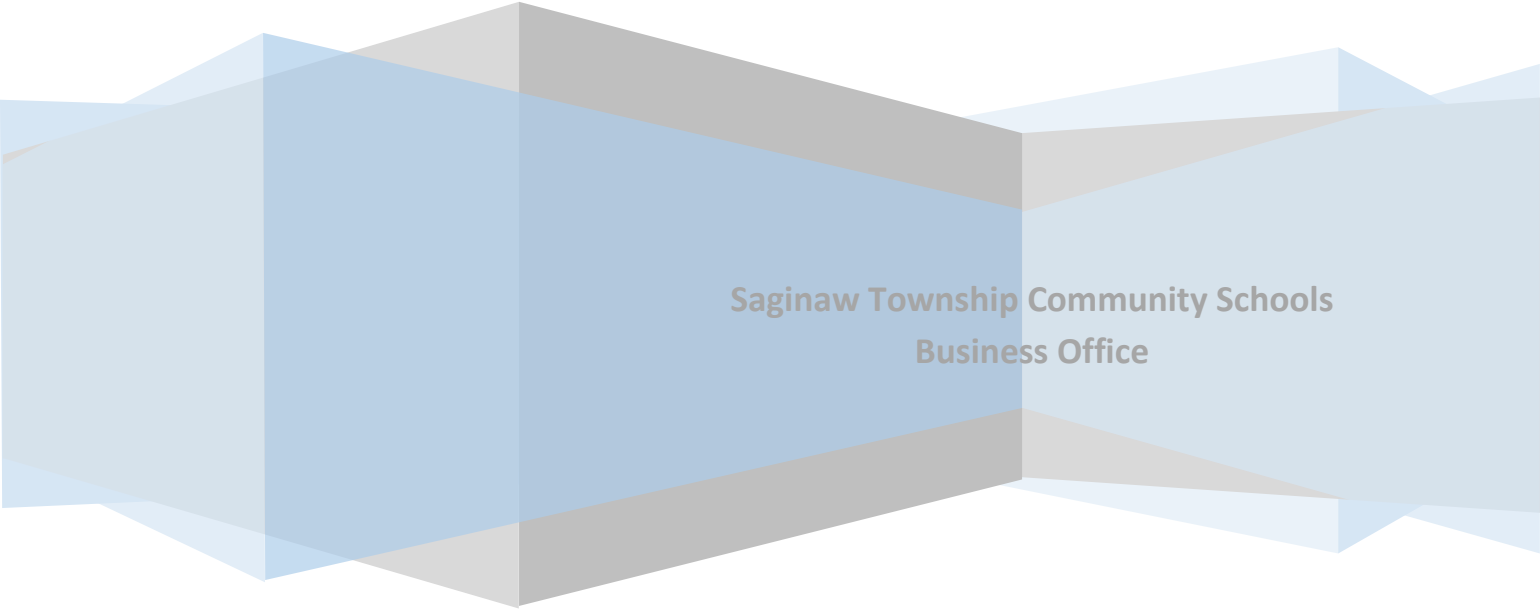


Conference and Travel Guidelines

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Introduction to Conference and Travel

The District expects and requires a high level of accountability, transparency, and effective use of its resources regarding travel. When traveling, employees should consider their usage of resources as limited and are to be used effectively and efficiently. When possible, the District will work to either advance pay through issuing a purchase order or use the District credit card to cover travel expenses for staff. It is our goal to minimize the need for employees to be reimbursed for travel expenses incurred while traveling for work purposes.

The District also understands that travel can take people away from their families, classrooms, and offices where they still have responsibilities regardless of their travel. Therefore, some flexibility in the administration of the reimbursement procedures will be attempted.

It is both a responsibility and a privilege to travel and represent our District at conferences outside of the District. The District has adopted a policy that allows flexibility and expects staff members to treat both, the time they are traveling and the funds used, as an important resource and should be considered as such when they make their choices.

Should the need arise to cancel your conference arrangements, please know that it is the responsibility of the attendee to notify the building secretary that they are not able to attend a conference paid for by the District. Failure to notify the District or attempt to arrange for refund or for another employee to attend the conference may result in the employee owing the District the full cost of registration and any other expenses already incurred by the District for the conference.

All actual/final expenses must be submitted within 30 days after the conference. Reimbursement may be made after 30 days ONLY if funds are available. Reimbursement will NOT be processed until ALL relevant information has been entered in Skyward Business/ERMA with the necessary receipts electronically attached see “Employee Expense Reimbursement Instructions” for more information regarding submitting an expense reimbursement in Skyward Business/ERMA. **Your approved Conference Request Form MUST be attached to your expense reimbursement in Skyward Business/ERMA.** Conference reimbursements with proper documentation attached are processed weekly.

To assist employees of the District with this policy, the following administrative procedures are below. If it is determined that an employee routinely disregards the procedures outlined below, the employee may be limited in their ability to travel on behalf of the District.

Conference and Travel Procedures

- 1) Any employee that would like to attend a conference will need to complete the conference request form four weeks prior to the conference and attach the following:
 - A. **Conference Agenda** - The conference agenda/registration information that clearly identifies start/end dates and times and if any meals are provided by the conference organizers. **DO NOT USE ANY PERSONAL CREDIT CARDS TO REGISTER FOR CONFERENCE.** District card must be used to register for conference upon receipt of approved conference request form.

- B. **Travel** - Travel expenses will be covered at the least expensive, most practical means of getting to and from the conference. All supporting travel documentation must be attached to the request as well.
- Mileage will be reimbursed from home or school (whichever is closest) to/from destination. A Google Map listing multiple routes must be attached to the request. You must choose the route with the least amount of miles for reimbursement calculation. Carpooling to and from conferences is highly encouraged.
 - Airline selection (if applicable) will be based on reasonable flight departures for the staff member and the best economic choice for the district. Three quotes must be obtained or you may use Google Flights as back up documentation. Travel by air must be pre-approved by the Director of Finance or the LCIA Director. The District does not cover early boarding and preferred seating. The District will cover the cost for any reasonable additional cost for one piece of luggage if necessary.
 - ❖ In situations where employees would normally travel by air or train but an employee chooses to drive instead (or vice versa), the district will cover the least costly of the options: driving, train or flight. At the time travel arrangements are made, the employee must obtain pre-approval by the Director of Finance or the LCIA Director and airfare pricing from **three different travel websites** for flights (Google Flights may be used) or quotes for travel by train, documenting the cost for the applicable travel dates and attach them to the Conference Request Form. The district will cover up to the lowest quote for travel, including fees and taxes.
 - For travel by train, you will be required to attach a driving/mileage cost comparison (using Google Maps), from school or home whichever is closest to the conference. This documentation must show that travel by train is the least costly option for getting to/from the conference.
 - Car/van rentals and related expenses will NOT be approved.
 - Cab, bus or shuttle, whichever is least expensive round trip between airport and hotel and to conference meetings, will be reimbursed. You must obtain a receipt. Employees are required to use free shuttles whenever they are available.
 - The maximum reimbursement for cab fare tips is 15% regardless of source of funds.
 - Parking and road toll expenses will be paid to traveler when detailed receipts are submitted, and when necessary for travel to/from the conference.
- C. **Lodging** - Conference hotel is the first option for all attendees. Take note of deadlines when submitting requests. DO NOT USE ANY PERSONAL CREDIT CARD TO BOOK A HOTEL. District card must be used to secure hotel room upon receipt of approved conference request form.
- Overnight lodging will be covered if applicable and if approved on your conference request form. Lodging will not exceed the lowest single room rate charged by the hotel. If the conference venue is not a hotel, and overnight lodging is required, you **MUST** obtain three comparable quotes from hotels nearest to the conference and attach them

to your conference request form. The district will cover the least costly room rate of the three quotes regardless of which hotel room is booked. Any exceptions to this will need approval from the Director of Finance or LCIA Director and a written, signed statement explaining the exception.

- Shared expenses for hotel/lodging are highly encouraged.
- Extra charges for amenities and additional guests in the room will not be reimbursed (i.e. family members).
- Parking expenses will be covered when detailed receipts are submitted.
- Valet charges, other gratuities, and personal telephone calls will not be covered by the district.

D. **Meals** - If an employee is requesting meal reimbursement for a conference and the schedule or brochure does not address conference provided meals, the person attending the conference (or secretary, if designated by the administrator) must call or email the conference provider to inquire as to what meals (if any) are provided by the conference. The employee (or secretary) must note the date and name of the person they spoke with on the request form next to the meals section or "see attached" and attach an email from the conference provider to substantiate the meal reimbursement request. If multiple employees are attending the same conference, one person may be designated to contact the conference regarding meals as long as the note or email is written or attached to **each** conference request form to serve as back up for the meal reimbursement request.

- If one or more meals are included as part of a conference registration fee, lodging or by a vendor etc., only remaining meals may be requested for meal allowance. You cannot claim meal allowance in lieu of conference provided meals. **Continental Breakfast is considered a provided meal.** There are no exceptions allowed.
- **ONLY** out of state meals will be reimbursed the day/night before a conference.
- Conference meal allowance, regardless of funding source is as follows, if applicable criteria are met (meal receipts are **NOT** required):
 1. Breakfast – \$10 if leaving home before 6 a.m.
 2. Lunch – \$15 if leaving worksite/home before 10 a.m. (day of departure) or returning to worksite/home after 2 p.m. (day of return).
 3. Dinner – \$21 if returning to worksite/home after 7 p.m. following conference.



Conference Request Form

Employee Instructions

- Complete the form (G:\Data\FORMS\Business Office\Conference Forms) attaching any documentation needed (brochures, printouts, Google map, etc.) At least 30 days PRIOR to attending the conference.
- The employee needs to sign, as well as the principal/supervisor, and LCIA/Grants Supervisor and/or Superintendent. If an additional person is required there is an additional signature line labeled "Other" in the signature section of the form.
- The central office will scan approved conference information to the employee.
- The original form will be maintained by AP
- Once the form has all necessary approvals, the building/department secretary will utilize the form to enter purchase orders and coordinate use of district credit card with the employee for conference and lodging payment.
- The building secretary will attach the conference request form, receipts for conference registration, hotel, air fare and other expenses to the purchase order. DO NOT attach receipts for meals.
- The district will be paying for conferences utilizing district credit cards. In the event that conference requests are not submitted within guidelines, you may be required to pay and request reimbursement with your additional expenses after the conference, all costs are subject to proper approvals, prior to reimbursement.
- Additional expenses incurred by staff will be reimbursed by expense reimbursement in Skyward (ERMA). **You must attach your approved request conference form and attachments to your employee expense reimbursement.**
- In the event that you are unable to attend a scheduled conference please let the district know ASAP. You may be required to pay for the conference if other arrangements are not able to be made.
- Conferences, classes or seminars that have no registration costs associated with them still need to be approved since the majority of them will require a sub, mileage reimbursement or time off.



Conference Request Form

Building Secretary Instructions

- Review request and verify conference date is 30+ days away.
- Review meals request; check for meals provided, conference location, conference start and end times. Initial and date conference request form that meals request has been verified and is accurate.
- Give form to building principal/supervisor for review/signature.
- Send to Central Office for additional approvals. The original will stay with AP.
- Central office will email the approved conference form to secretary and staff attending.
- Upon receiving the conference request form back, verify a signed district credit card acknowledgement form is on file or print copy for staff member to sign prior to checking out district credit card.
- Staff member should check out building credit card to register for the conference. Once they have registered and provided a receipt, enter a PO.
- If the staff member requires lodging, they should check out a district card for those costs. Once lodging has reserved a receipt should be printed and PO should be entered.
- The description line should include payee name and employee name. For example, Holiday Inn-J. Doe or MSBO-K. Smith
- Verify the hotel has a tax exempt form and authorization form filled out for the staff to use the credit card on file to purchase the room, if the district card is not available for them to take to the conference.
- Upon completion of the conference, the employee must submit any additional conference expenses (meals, mileage etc). A scan of the original conference request form and attachments **MUST** be attached the expense reimbursement or it will be denied by Central Office.