

## **CONFERENCE ATTENDANCE**

A staff member requesting permission to attend a conference must obtain prior approval. Such request must be submitted at least fifteen (15) days prior to the date of such conference using either the *Same Day Conference/Workshop Attendance Request Form* or the *Overnight Conference/Workshop Request Form*. *For certified staff, these forms are to be completed @ [www.MyLearningPlan.com](http://www.MyLearningPlan.com)*

Promptly upon return from the conference, the employee is to forward the approved copy of the *Conference/Workshop Attendance Request Form*, *Travel/Conference Expense Claim Form* showing actual expenditures, supporting receipts attached, and the signed receiving copy of the purchase order to Accounts Payable. Every effort should be made to submit a claim form within four (4) weeks from the date of the conference. Complete details for Conference/Workshop Attendance approval and reimbursement are set forth below in Administrative Regulation #6700:

The BOCES supports staff attendance and participation at conferences, workshops and meetings that are professionally appropriate and related to the employee's responsibilities. Whenever feasible, expenses will be paid by purchase order directly to vendors.

Employees will be reimbursed for "necessary and reasonable" expenses incurred in connection with such meetings.

### 1. Reimbursement of Expenses

The following rules for reimbursement of expenses to employees actually and necessarily incurred in the performance of their official duties are adopted in accordance with Board Policy No. 5210 (Professional Growth). It shall be the duty of the Assistant Superintendent for Business Services or his/her designee to provide any forms required by these rules and to see that these rules are enforced.

Reimbursement shall be made for meals, lodging, travel and other miscellaneous expenses on the Travel/Conference Expense Claim Form.

#### **A. Meals:**

1. Overnight: A maximum per diem for meals is \$50.00. Suggested guidelines for meals are as follows:

Breakfast	\$ 8.00
Lunch	\$12.00
Dinner	\$30.00

Same day meals will be reimbursed based on receipts to a maximum of the standard overnight per diem.

2. BOCES employees may be reimbursed for their meal expenses incurred during the normal hours of employment under the following circumstances:

- a. When the employee has a meeting with an out-of-town official, an official of a component or non-component district, an official of a requestor agency, or a BOCES official at which eating is an incidental part.
- b. When the employee attends or participates in a regularly scheduled meeting of an organization held for school business purposes.
- c. When the employee attends luncheons or dinners sponsored by the BOCES for which a charge is made to all participants for the cost of food and beverage.
- d. When the employee conducts an interview with a prospective candidate for an administrative position, at which the meal is an incidental part.
- e. When the employee is required to be away from his/her home on required BOCES business during usual dinner hours or is otherwise directed to attend BOCES related meetings or functions when the time interval between the end of a normal work day and the start of a meeting is insufficient to permit travel to and from the employee's home.
- f. When the employee is away from his/her normal work place during normal hours on BOCES business that has been pre-approved through conference and workshop procedures.

B. Circumstances under which reimbursement WILL NOT be made:

1. When meals are held principally for social purposes, such as retirement dinners, expenses will not be reimbursable.
2. When conference approval forms have not been pre-approved.

C. Travel:

1. Travel should be made by the least costly means.

2. Travel expenses for other than personal auto mileage, including air travel, rail travel, tolls, taxis and parking fees must be supported by receipts.
3. When the employee travels overnight, he/she shall be authorized to make one personal telephone call each day away from home.

D. Mileage:

Please refer to your Collective Bargaining Agreement. The reimbursable rate shall be the rate established by the IRS.

E. Miscellaneous Expenses (Receipts Required):

1. No employee of the BOCES is authorized to obligate the organization for purchase of gifts, such as flowers, greeting cards, or presents, either for employees or non-employees. No such expenditure will be reimbursed.
2. All supplies and materials for which employees are reimbursed by the BOCES shall become the property of the BOCES.
3. Request for reimbursement for meeting expenses/guest meals must be submitted on the Meeting/Guest Expense form. Such expenses will not be reimbursed without the form.

F. Special Aid Projects:

Expenditure of funds derived from Special Aid funded projects are subject to the same regulations, as are General Fund expenditures, except when the approved project states otherwise.

2. Reimbursement for Conference or Workshop Attendance

The following rules for reimbursement to employees of expenses actually and necessarily incurred in the performance of their official duties while attending a conference or workshop are adopted in accordance with Board Policy No. 5210 (Professional Growth). It shall be the duty of the Assistant Superintendent or his/her designee to provide any forms required by these rules and to see that they are enforced.

Reimbursement shall be made for registration, meals, lodging, travel and other miscellaneous expenses on either the Overnight or the Same Day Conference/Workshop Attendance Request Form in accordance with the following:

A. Approval:

Prior written approval must be obtained from the program administrator and from the District Superintendent, Assistant Superintendent or his/her designee, for attendance at conferences. A "conference" is defined as a conference, convention, institute, seminar or workshop.

B. Claims:

1. Claims for travel (other than personal vehicle mileage) must be supported by receipts showing that expenses were actually incurred and by written justification explaining unusual expenditures.
2. BOCES employees are directed to expend only reasonable amounts for rooms, transportation, other necessary expenses, and not to exceed \$50.00 per day for meals.
3. Mileage shall be reimbursed at the rate established by the IRS.

C. Procedure for Overnight and Same Day Conference/Workshop Attendance Request Form:

1. The employee should submit the attendance request form in triplicate showing estimated expenses to the program administrator who in turn will, upon approval, process a purchase order in the amount of the estimated expenses and forward to the District Superintendent, Assistant Superintendent, or his/her designee.
2. The District Superintendent, Assistant Superintendent, or his/her designee, upon approving the request, will make the following distribution of the forms:
  - a. One copy to the Human Resources Department.
  - b. One copy to the requestor (through the Program Administrator).
  - c. One copy with the purchase order to the Purchasing Agent.
3. The District Superintendent, Assistant Superintendent or his/her designee, upon disapproving the request, will send back all three copies to the requestor through the approval process.
4. Advance reservation fees for conferences may be prepaid by the BOCES when such prepayment is a condition of attendance at the conference, or a discounted conference fee is available. In such cases, a separate purchase order, accompanied by the registration form and conference approval form, must be prepared to process

such prepayment. It will be the responsibility of the program administrator who approves the prepayment to obtain a refund in the event of non-attendance.

5. Should the requestor not attend the conference, the receiving copy of the purchase order should be forwarded to Accounts Payable with notification to void the purchase order.
6. Upon request, tax exemption certificates for room and board will be provided by the Accounts Payable office. BOCES cannot reimburse any New York State sales taxes.
7. Promptly upon return from the conference, the employee is to forward the approved copy of the Conference/Workshop Attendance Request Form, Travel/Conference Expense Claim Form showing actual expenditures, supporting receipts attached, and the signed receiving copy of the purchase order to Accounts Payable. Reimbursement of incurred expenses will be made through the normal accounts payable system with a check being issued in the earliest feasible check run. Under normal processing, the maximum delay should be three weeks.

The Board will approve the annual Board expense travel budget each year. In the event funds are needed over and above the annual budgeted expense level, Board approval will be necessary to increase the budgeted amount. (Refer to Policy 6700 and Policy 6701.)