SUBJECT: TRAVEL EXPENSES/CONFERENCE APPROVAL

These guidelines apply to expenses incurred by persons authorized to travel on St. Lawrence-Lewis BOCES business.

Definitions:

a) Conference: Activity or workshop which requires a registration fee and/or overnight accommodations.

b) Meeting: Activity or workshop which does not require a registration fee or overnight accommodations and is a required part of the job duties.

While continual development of professional expertise is essential for quality programs, attendance at conferences and workshops must meet the criteria of financial feasibility, as well as, potential for improving instructional strategies and fostering program development. Students must be the ultimate benefactors in staff involvement at conferences and meetings. Conference summary will be provided by attendee as requested by program director.

All conference expenses must be approved by the Purchasing Agent prior to any reservations or registrations being made.

While ultimate approval of attendance at conferences and meetings rests with the Board of Cooperative Educational Services, specific approval for certain categories of conferences/meetings shall rest with the District Superintendent or designee as follows:

Conference Procedure

a) A Request for Approval of Staff Conference Form must be filled out and given to your immediate supervisor as soon as possible, but not later than two (2) weeks prior to the conference date. Less than two (2) week's notification will be considered only in emergency situations.

b) Conferences involving one (1) day or less, with a registration fee but no overnight accommodations, shall be approved by the Supervisor or Program Director.

c) Short-term conferences which require up to three (3) nights' accommodations shall be approved by the immediate supervisor and then given to the District Superintendent or designee for final approval. If dates change after the conference request form has been approved, the amended form must be submitted within one (1) week of travel dates.

d) Long-term conferences which require (4) nights accommodations or more shall require prior approval by the Board of Cooperative Educational Services. (Emergency Situations may be approved by the District Superintendent.) Federal projects requiring mandatory attendance at conferences held by the grant funding source will be the only exception. This must be noted on the conference request form under "comments" and the federal project number must be listed under "code."

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  e)   In the case of shared service and itinerant teachers, requests will be considered only after consent by the sponsoring school administrators has been secured by the teacher and submitted to the BOCES Supervisor in charge.

Meeting Procedure

  a)   For meetings which are a required part of the job duties and involve limited expenditures and no overnight accommodations, the manner of approval shall be at the discretion of the supervisor or senior program leader.
  b)   Expenses shall be limited to mileage and/or meal reimbursement. A Request for Reimbursement Form, detailing the purpose of the expense, original receipts, and Mileage Claim Form must be submitted within thirty (30) calendar days of return to be reimbursed.

Obligations of all Conference Participants

  a)   Regardless of your teaching assignment, lesson plans and all class preparation must be accomplished prior to conference or workshop date.
  b)   If requested by your immediate supervisor, a written report will be submitted so that pertinent data and information may be disseminated.
  c)   Every effort must be made to ensure accurate travel plans are in place. In emergency situations (such as but not limited to mistakes with travel or accommodation arrangements), the employee shall contact their immediate supervisor for permission to incur additional cost. If the communication is not possible, expenses may be incurred. The District Superintendent will review the expense prior to payment.

Transportation

No air transportation will be permitted for reimbursement unless prior approval is obtained. Prior approval on the conference request form is still required even if the charge card is used. Air fare will be reimbursed in an amount not to exceed regular coach class fare. Receipt must be included with the voucher.

Train or bus fare will be reimbursed. Receipt must be included with the voucher.

Private car mileage will be reimbursed in accordance with the mileage rate established by the Internal Revenue Service (IRS). The IRS approved rate existing on the date of travel, will be used for reimbursement. This reimbursement is only if a school vehicle is not available. The employee is first expected to use BOCES vehicles, if available. In addition, the BOCES will reimburse cost of tolls and/or parking. Receipts must be included with the voucher.

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Rental car costs will be reimbursed only if authorized in advance by the District Superintendent or designee.

If taxis are used, receipts should be included with the voucher.

Meals

Meal charges, exclusive of tips, should be within the U.S. General Services Administrative indexed guidelines by region/country. The rates can be applied by meal or per diem.

Receipts must accompany vouchers. Alcoholic beverages are personal expenses and not reimbursable.

As it is not practical for those traveling on BOCES business to prepare and present a tax exemption certificate for an individual meal and because it is not common practice for restaurants to accept the tax exemption certificate, sales tax imposed on food by restaurants will be considered an expense incidental to the meal and an actual and necessary expenditure incurred in connection with said travel. In General Municipal Law § 77-b and Opinion of the State Comptroller 80-163, reimbursement of the sales tax on meals is an authorized expenditure.

Hotel

Those traveling on BOCES business are responsible for obtaining the most reasonable rate when staying at hotels. When the rate is predetermined by the organization sponsoring the event, the person shall secure a room rate at no more than the predetermined rate. When attending meetings not held at a hotel, the employee should secure the most reasonable rate possible, at a nearby hotel. If canceling a night stay, please notify the hotel/motel timely for the charges to be forgiven. A written statement will be required if not cancelled.

Other

Those expenses which can be considered personal are not reimbursable. These include, but are not limited to, expenses such as health-club fees, pay television, and alcoholic beverages.

Phone Calls

One (1) personal phone call per day, not exceed five (5) minutes in length, shall be reimbursable to persons authorized to stay overnight on BOCES-related business.

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SUBJECT: TRAVEL EXPENSES/CONFERENCE APPROVAL (Cont'd.)

Gratuities

Tipping where appropriate shall be reimbursed at a rate not to exceed 18% of the cost of the meal.

Conference Expense Voucher

All Conference Expense Vouchers for reimbursement of permissible expenses incurred while traveling on BOCES business shall be submitted immediately upon return and given to your immediate supervisor for review and processing. No voucher sent in after thirty (30) calendar days will be reimbursed, except with the approval of the District Superintendent or his/her designee.

Vouchers shall include all original receipts with sufficient documentation, including the date, the expense incurred, reason for expense (i.e., meals, travel, lodging, etc.), and number and names of people (if vouchers cover others paid for). Within New York State, taxes in any form are not reimbursable. Therefore, you must obtain a tax exemption certificate prior to conference participation.

Out-Of-State-Travel

Out-of-State-travel is not tax exempt. Taxes will be reimbursed.

NOTE: Refer also to Policy #5210 – Professional Growth/Staff Development.

Revised: 7-10-03
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Revised and Re-adopted: 7-07-11