

**MOUNT PLEASANT COTTAGE SCHOOL UNION FREE SCHOOL DISTRICT****SUBJECT: PROFESSIONAL DEVELOPMENT AND CONFERENCE ATTENDANCE/  
EXPENSE REIMBURSEMENT****Attendance at Professional Development Programs/Conferences/Workshops**

All District personnel are encouraged to attend professional development programs, conferences, conventions and the like, at District expense and subject to prior administrative approval, for the purpose of professional self-improvement or enhancement of educational services, within budgetary limitations as allocated by the Board of Education. Every effort should be made to submit a request for conference approval at least ten (10) days in advance. Staff should utilize the Conference Request Form (Form #6161F) for this purpose.

Staff members may be allowed to attend professional conferences in certain instances at their own expense if they have prior approval of the Superintendent. Such a request, if approved, must result in no expense to the District, other than the cost of the substitute, and will be at no loss of personal leave time or salary to employees.

After approval of staff attendance at the conference or professional development program, a purchase requisition will be completed by the business office in sufficient time prior to the conference so that the expenditure(s) may be encumbered against the proper code.

A brief written report of the conference should be presented to the Building Principal/immediate supervisor and/or the Superintendent of Schools after the conference, whenever requested.

Within budget limitations, the Superintendent or his/her designee may authorize requests for staff reimbursement of expenses for conference attendance and attendance at other professional development programs, as well as reimbursement of other authorized expenses, in accordance with the terms of this Regulation and upon completion of the Claim Form For Conference Expenses (Form #6161F.1), with receipts attached, upon the staff member's return. (see subheading "Guidelines for Conference Request and Claim Forms" of this regulation)

Travel or conference attendance without prior authorization will be at the participant's own expense.

General guidelines for expenses to be reimbursed by the District are outlined below and should be adhered to closely. Requests for further interpretation should be addressed to the immediate supervisor and/or business office.

In accordance with General Municipal Law Section 77-b, an advance payment may be requested by those staff members duly authorized to attend the professional program, conference, convention and the like for estimated expenditures, for registration fees, travel, meals, lodging and tuition fees provided itemized vouchers showing actual expenditures are submitted after

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such attendance. (see subheading "Expense Form/Voucher" of this regulation) To the fullest extent possible, meals, public transportation, lodging expenses, and registration fees will be paid directly by the School District by Purchase Order.

**Rules Relating To All Employee Travel**

- 1) Meal expenses for overnight travel will only be reimbursed based on a per diem rate as outlined below. Expenses for overnight-approved travel will be reimbursed when accompanied by original receipts for lodging and other reimbursable expenses.
  - a. The United States General Services Administration publishes the per diem meals rates for all major cities in the United States. (<http://www.gsa.gov>)
  - b. When completing the Claim Form for Conference Expenses (#6161F.1), contact the Business Office with any questions.
- 2) All conference travel must have a completed and approved Conference Request Form (#6161F) on file.
- 3) All reimbursements must be submitted using a Claim Form for Conference Expenses (#6161F.1).
- 4) When traveling by air, District employees shall use the lowest commercial carrier rates available.
- 5) New York State sales taxes for lodging and meals cannot be reimbursed. A Sales Tax-Exempt Form can be obtained from the Treasurer's office prior to travel for hotel accommodations.
- 6) Travel over three hundred (300) miles per round trip must be by public carrier unless it can be demonstrated that automobile travel will be more economical with respect to the following: time involved, the cost of lodging and meals, the existing mileage allowance, and accessibility of the destination by public carrier.

**Guidelines for Conference Request and Claim Forms**

Conference Request Forms are only to be used by District employees. If there are no expenses to be paid by the District, the Conference Request Form requires only the approval of the Principal/designee and does not get sent to the Business Office. The Superintendent/designee approves those travel Conference Requests which have reimbursable employee expense greater than one hundred dollars (\$100).

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The Principal or Superintendent may impose restriction to the Conference Request, such as "time only", meaning the employee has personally incurred all costs of the conference.

The procedures for completing a Conference Request are as follows:

- 1) Complete all form information. Include a complete budget code.
- 2) Under District Prepaid or Billed," list only those expenses that will be paid using a District purchase order.
- 3) Under "To Be Reimbursed," list only those expenses that will be paid by the employee.
- 4) For regular local monthly meetings which have a meeting fee (\$50 or less), costs can be claimed on the Mileage Report Reimbursement Request. Specific divisions may have additional requirements.
- 5) Conference Requests that do not require any type of expenditure of District funds may not be required by your Supervisor. Each Supervisor will establish proper protocol in these cases.
- 6) Supervisor's approval is required.

The procedures for completing a Claim Form for Conference Expenses are as follows:

- 1) All appropriate original receipts must be attached. Reimbursements will not be approved if copies of receipts are used. In circumstances where a personal check or credit card is used, a copy of the check front and back or credit card statement will be acceptable.
- 2) Only one employee can submit for reimbursement per receipt.
- 3) Proper types of receipts include:
  - a. Store register tapes showing the store name, description/date need to accompany a brief description justifying purchase.
  - b. Invoices with company letterhead listing the employee as the purchaser and stamped paid in full.
  - c. Copy of front and back of canceled check along with order form or registration form.

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- d. Itemized hotel bills are required. A credit card receipt is not sufficient.
  - e. Entertainment costs will not be reimbursed.
  - f. If a meal receipt includes more than one meal that is being reimbursed, a list of the people included and district name/organization is required.
- 4) Only mileage and meal limits, per established rates for employee travel, do not require receipts.
  - 5) The complete budget code must be entered, or the claim form will be returned to the Supervisor, which could delay processing.
  - 6) Other expenses could include, but are not limited to, work related telephone costs and conference materials.
  - 7) Supervisor's approval is required.

**Guidelines for Use of Mileage Report Reimbursement Request**

A Mileage Request is to be used for employees only.

The procedures for completing a Mileage Request are as follows:

- 1) No mileage is allowed between your home and your regularly assigned location.
- 2) Mileage from home to a work assignment for job related activities after normal working hours is reimbursable.
- 3) If you travel directly from home to a location other than your regularly assigned location, you must deduct the miles from your home to your regularly assigned location.
- 4) Original receipts are required when submitting for Parking, Tolls and Other. If you use "EZ-Pass", submit your monthly statement with the appropriate charges highlighted.
- 5) Only appropriate budget codes.

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- 6) For regular local monthly meetings which have a meeting fee (\$50 or less), costs can be claimed on this form with the appropriate receipts. A division may have additional requirements.
- 7) Supervisor's approval is required.

Tax Exempt Status

The Mount Pleasant Cottage School Union Free School District is exempt from sales and/or use taxes within New York State. Tax exempt forms should be obtained in advance for such items as hotel rooms, meals within the hotel, car rentals, etc. The School District is not exempt from sales or use taxes outside of New York State, so no deduction would be made in such instances.

Personal Expenses

Personal expenses must be borne by the individual and will be non-reimbursable.

Lodging

Costs for hotel and motel accommodations shall be reimbursable, excluding tax. Tax exemption forms are available in the business office and must be presented to the vendor. An invoice must accompany the request for reimbursement.

Registration Fees

Registration fees are reimbursable. A receipt must accompany the request for reimbursement.

Expense Form/Voucher

Upon return from the conference, workshop, or meeting the employee shall, within ten (10) days, file a completed Claim Form For Conference Expenses (#6161F.1). Said voucher shall list all reasonable and necessary reimbursable expenses for attendance at the conference, workshop or meeting from which shall be deducted any advanced payment, thereby indicating the net amount due to the individual or the balance to be returned to the Mount Pleasant Cottage School Union Free School District. Any balance due shall be reimbursed to the School District in the form of a personal check payable to the Mount Pleasant Cottage School Union Free School District.

