CONFERENCE REIMBURSEMENT PROCEDURE

A. OBJECTIVE: To establish and maintain a district procedure for conferences and reimbursement, including pre-approval of conferences and the definition of allowable district conference and meeting travel expenses.

B. SCOPE: Ingham ISD – All Staff

C. DEFINITIONS: The term “conferences” includes workshops, seminars, in-services and conventions related to district business or district-related professional development. Meetings are defined as related to district business. This procedure applies to both “conferences” and meetings.

D. RESPONSIBILITY: It is the responsibility of cabinet to develop this procedure and ensure that the procedure is communicated to staff.

E. PROCEDURE:

1. Pre-approval of conference attendance and estimated expenses
   a. If no overnight stay is required, staff verifies that budget is available and is consistent with any contract provisions, then submits requisition for registration fee to supervisor. Supervisor approves or disapproves the requisitioned request.
   b. If an overnight stay is required, staff completes conference pre-approval form [see exhibit 3810.00-R(9)E(2)], including estimated expenses and verifies that budget is available.
   c. Staff submits conference pre-approval form to their supervisor.
   d. Supervisor reviews conference pre-approval form (when overnight stay) or requisition (if no overnight stay) for alignment with department/program goals, alignment with individual staff professional development plan, and availability of budget.
e. Supervisor approves or disapproves request and returns form to staff member.

2. Arrangements

a. Arrangements for registration fee, hotel, air travel and car rental should be made by the department using the district’s purchasing procedures. A purchase order will be issued and the district will make direct payment. No sales tax should be paid on lodging in the State of Michigan.

b. The employee should pay for meals and ground transportation and submit after the conference/meeting. (This excludes car rental that is arranged and paid by the district.)

c. All expenses related to conference attendance, including registration, hotel and travel should be charged to object code “3220” in the appropriate program. Note: Mileage to a conference is charged to “3220” and not to “3210” local travel. Mileage to meeting is charged to “3210”.

d. Staff completes leave form for date(s) absent from work for conference attendance and submits to supervisor.

3. After conference attendance, staff submits allowed expense, per exhibit 3810.00-R(9)E(1), on employee expense form.

a. Original detailed receipts are required for all conference related expenses. This includes receipts for district paid expenses such as hotel, and employee paid expenses such as meals. A credit card receipt without a detailed breakdown of the expenses is not acceptable.

b. The receipt documentation must include the name(s) of the IISD employee(s) or business guest, and the business purpose.

c. If any non-allowed expenses such as spouse expense or alcohol are included on the receipt, a deduction must be made which includes the related taxes and tip related to the non-allowed expenses.
d. The conference pre-approval form should be attached to the employee expense reimbursement form if applicable (when overnight stay), and submitted to supervisor with original receipts.

e. Supervisor ensures only allowed expenses are paid by district or reimbursed to employee by district. Supervisor verifies no tax is reimbursed on lodging in the State of Michigan.

F. PROCEDURE RECORD:

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<th>Date</th>
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