

SCHOOL BOARD CONFERENCES/WORKSHOPS REGULATION***Reimbursement for Mileage and Other Expenses for CVES Board Members***

Mileage expense claims should be based on, actual odometer reading, approved mileage chart, or on the shortest route between the points required to be traveled as provided by Google Maps. The mileage chart will be maintained by the School Business Official and periodically updated with the approval of the District Superintendent.

- I. **Travel**- With the use of a personal vehicle, approved mileage will be paid at the IRS rate.

Upon approval of the Request for Approval of Attendance to Conference/Workshop Form #2521-E.1, board members are responsible for securing reservations for other transportation, such as plane, train, bus, car rentals, etc., as indicated therein. Purchase requisitions must be submitted in advance of travel for other transportation costs and purchasing guidelines (quotes) as indicated in CVES Policy #6700-E.1 must be followed, when applicable.

Rental vehicles may also be arranged through state contract pricing when available. Carpooling should be arranged whenever possible when a rental vehicle is being used and more than one CVES representative is traveling to the same function. Taxicabs are allowable only for essential transportation and shall be accompanied by a receipt for reimbursement.

- II. **Lodging**- In accordance with the following, full reimbursement for lodging will be made. If state or national conference hotel block housing is available and the attendee chooses a hotel not on that list, allowable lodging shall not exceed the conference hotel rate. If the hotel block housing is not available, the Board Member may seek alternate housing arrangements.

Upon approval of the Request for Approval of Attendance to Conference/Workshop Form #2521-E.1, the Board Member is responsible for securing reservations for lodging.

Payment for lodging can be arranged through the purchase order process or payment for lodging can be reimbursed to the Board Member after travel has occurred as submitted on the Mileage & Expense Claim Form #2521-E.2. Itemized receipts for lodging must accompany each request for reimbursement. If lodging is prearranged through a purchase order, receipts must be submitted to the Business Office after travel is completed.

If a hotel does not accept purchase orders, advance payment for lodging can be pre-arranged through the purchase order process. Purchase requisitions for advance payment of lodging must be submitted to the business office at least 15 days in advance of expected travel dates, and must be accompanied by an approved Request for Approval of Attendance for such conference/workshop.

No reimbursement can legally be made for NYS sales and room taxes. For lodging within NYS, the NYS Exemption Certificate ST-129 must be completed and accompanied with the

purchase order or given to the establishment to obtain tax exemption. Out of state taxes on lodging may be reimbursed.

Tips for bellmen, porters, hotel maids, etc. shall not be reimbursed, unless there is a required gratuity charged for such services by the hotel, as indicated on the hotel invoice.

- III. **Meals**- When traveling on an approved conference/workshop (Form 2521-E.1), meals will be reimbursed at the current U.S. General Services Administration meal reimbursement rates, which can be found at www.gsa.gov/perdiem. Rates are determined by location of conference/meeting/workshop. No receipts are required to be submitted. Meals claimed can only be for oneself.

Board members who attend an approved event that includes meals, shall not be entitled to reimbursement under this policy for those meals included and paid for with the event.

- IV. **Registration** – Registration fees for approved conferences or workshops should be submitted through the purchase order process. Upon approval of the Conference/Workshop Attendance Form #2521-E.1, it is the responsibility of the board member to confirm registration for conferences or workshops.

- V. **Miscellaneous** – Minor incidental travel expenses only, such as parking, tolls, cab fares, etc., may be claimed for reimbursement and shall be accompanied by an original receipt. If a board member uses EZ Pass, they can submit a copy of their monthly statement, which includes charges and dates of charges, for reimbursement.

- VI. **Claim Form**- Substantiation for expenses must be on an original claim form signed by the individual who is to receive reimbursement. This form shall clearly itemize all expenses and shall note the purpose of the trip. All supporting documentation must be attached. All claims must be submitted within 60 days of the commencement of the reimbursable expense in order to be reimbursed. If claims are complete and accurate, payment will be made to the Board Member within two weeks of receiving the claim in the Business Office.

Supporting documentation should specify the exact nature and timing of an expenditure. Documentation that shows the nature and timing of an expenditure includes invoices, itemized bills, itemized receipts, etc.

Documentation that would not be acceptable as adequate supporting documentation includes but is not limited to:

1. credit card slips which only show a total but no detail;
2. a credit card statement (with the exception of those that show exactly what items are purchased and when);
3. the remittance form on a bill without the supporting detail attached;
4. a receipt without item descriptions;
5. any documentation without a date (must include month, day and year);
6. any documentation that does not indicate who or what provided the goods and/or services

- VII. **Conference Request** – The Request for Approval of Attendance to Conference/ Workshop Form #2521-E.1 must be submitted to the Board Clerk to attend any conference or workshop 60 days prior to the conference or workshop. A copy of the conference agenda or brochure must be attached to the Request for Approval to identify the nature and purpose of the meeting.

The Request for Approval form is not required for travel incurred as part of a Board Member's regular responsibilities within the supervisory district of CVES or the supervisory districts of other BOCES being served by CVES (i.e. board meetings, committee meetings, special events, etc.)

Board members MUST have the Board President's or Board approval before attending the conference. A brief summary report may be required upon returning – the board member may also be asked to review, at a meeting, information learned.

A conference approval number will be assigned and provided by the Business Office for reference on all related travel requisitions or reimbursements.

- VIII. **Travel Advances** – In order to obtain a travel advance, board members must meet the following criteria; the individual must be attending a national conference or convention, and the conference/convention must be held outside New York State.

Upon 30 days prior to application, advances of money for estimated expenditures for meals, lodging and other incidental travel costs may be approved by the District Superintendent and made to a person authorized to attend a conference. Within 5 business days after such attendance, an expense claim form and necessary receipts showing actual expenditures must be submitted and monies advanced in excess of such expenditures be refunded to the district. Expenditures in excess of such estimates shall be audited and paid by the district. Where our board members fail to submit such documentation or return such excess advance at the time of submitting the itemized voucher or upon demand after audit of such voucher, the district shall deduct the amount of such unreturned excess advance from other money owed the board member.

Adopted August 20, 2014