



Conference and Travel Procedures

1. Any employee that would like to attend a conference will need to complete the Conference Registration Form and attach the following:

- A. A completed registration form with all the necessary details to register.
- B. A detailed description of the Conference/Workshop.
- C. The conference agenda that clearly identifies start/end dates and times and if any meals are provided by the conference organizers.
- D. All supporting travel arrangements must be attached to the request as well.
 - Expected mileage will need to be completed. Use home or school to destination round trip as an estimated calculation.
 - Conference hotel is the first option for all attendees. Take note of deadlines when submitting requests. **DO NOT USE ANY PERSONAL CREDIT CARD TO BOOK A HOTEL.** You will be liable for any expenses incurred if you fail to remove your reservation.
 - Airfare will be arranged by the District staff member processing the request. Airline selection will be based on reasonable flight departures for the staff member and the best economic choice for the district. The District does not cover early boarding and preferred seating.

2. All conference requests require multiple signatures prior to registration. Please take note of the timeline needed for completion. Note early registration deadlines. Department Chair/Supervisor and Principal must authorize request prior to submission to the District office.

- A. Principal Secretaries will forward all conference requests to the District Office for final approval. The Assistant Superintendent of Curriculum and Instruction will provide final approval for all in-state travel. A minimum of 4 weeks' notice is required.
- B. All out of state travel will require the Superintendent's signature. Please allow a minimum of two months for all out of state travel.

3. Once the C & I or the Superintendent's Office has approved the request, the corresponding grant coordinator's office will begin the process of completing the request.

4. A requisition is created and delivered to the District Purchasing Agent.

- A. The Agent will generate a Purchase Order. Registration will depend on how the vendor accepts registrants:
 - On-Line Registration: Participant will register themselves after notification of a PO number.
 - Faxed Registration: Participant will be registered by the Purchasing Agent and will send the PO to the vendor.
 - Emailed Registration: Participant will be registered by the Purchasing Agent and will send the PO to the vendor.

- B. Once a PO is generated, the District staff member processing the request will be notified and will communicate conference approval or denial status to the attendee via email.

C. After a PO is generated an email will be sent to the attendee who will have 24 hours from receipt of the approval notice to register for the conference, with the following exceptions:

- Any conference that will need to be faxed to the conference organizers will be completed by the Purchasing Agent in the Business Office.
- Any conference that needs to be paid up front with a credit card will need to be completed by the District staff member processing the request.

D. If the attendee is completing the registration, they will send any invoices or confirmation emails to the District staff person processing the request.

E. It is the responsibility of the attendee to notify Human Resources of the expected absence. They will need to complete an Absence Request Form signed by their immediate supervisor indicating they will be out of the building on school business.

F. Lastly, it is the responsibility of the teacher attendees to arrange for a substitute. Contact Human Resources and indicate the nature of the absence and expected day(s).

Administrative Guidelines on Travel

Overall philosophy on travel, meeting and conference attendance:

The District understands that travel has benefits and challenges for staff members. It is an opportunity to work with and learn with colleagues outside of the District. To meet our mission as the best high school district in the State of Illinois, our staff needs to learn and participate in a greater conversation regarding education and policies that impact our students, parents, and community. To that end, it is our attempt to allow staff the opportunity to participate in such conversations and to bring back such knowledge to share with the Proviso community.

The District expects and requires a high level of accountability, transparency, and effective use of its resources regarding travel. When traveling, employees should consider their usage of resources as limited and are to be used effectively and efficiently. Staff, when traveling in a group, may be required to use District vehicles or travel as a group instead of separately. Staff may be required to take hotel shuttles or shared rides to and from the airports at the beginning or end of conference instead of taxis to reduce costs.

The District also understands that travel can take people away from their families, classrooms, and offices where they still have responsibilities regardless of their travel. Therefore, some flexibility in the administration of the reimbursement procedures will be attempted.

It is both a responsibility and a privilege to travel and represent our District at conferences outside of the District. The District has adopted a policy that allows flexibility and expects staff members to treat both, the time they are traveling and the funds used, as an important resource and should be considered as such when they make their choices.

When possible, the District will work to either advance pay through issuing a purchase order or the District credit card to cover travel expenses for staff. It is our goal to minimize the need for employees to be reimbursed for travel expenses incurred while traveling for work purposes.

New administrative guidelines for travel and reimbursement:

Effective January 1, 2017, a new law, The Local Government Travel Expense Control Act, went into effect for all local governments in Illinois. The Board, at its February meeting, approved maximum reimbursement amounts for employee and Board travel and established the legally required policies for all travel for all staff and Board members. The following are the new maximum amounts for travel:

1. Air Travel – Round Trip Ticket – \$1,000
2. Rail or Long-Distance Bus Travel – Round Trip Ticket – \$1,000
3. Automobile Rental – Daily Amount – \$90
4. Taxis/Limousines/Ride Sharing/Bus – Daily Amount \$50
5. Lodging – Daily Amount – \$250 unless a higher rate is established by conference.
6. Meals – Daily Amount – Maximum amount is \$74 a day depending on location. The United State Governmental rates based on meals will apply.
7. Parking – Daily Amount – \$60
8. Reimbursement for Use of Personal Automobile, including tolls – \$300. This reimbursement shall be set forth at the standard mileage rate approved by the Internal Revenue Service for income tax purposes.

These amounts are the maximum rates, **however, staff are expected, when traveling on District business, to refrain from frivolous or extravagant expenditures for public funded travel and to find the most economical mode to travel.**

To assist employees of the District with this policy, the following administrative procedures are below. If it is determined that an employee routinely disregards the procedures outlined below, the employee may be limited in their ability to travel on behalf of the District.

Air-travel: It is important that reservations for District travel be done far enough in advance to get the best airfare possible. If a conference is approved, airfare should be booked as soon as travel is approved. If a fare cannot be found under the approved amount, travel cannot be booked until the Board of Education has approved an exception to the adopted amount. The District will not pay for first class or seat placement upgrades unless the price is the same as standard coach. Such upgrade costs, if used, will be at the expense of the individual traveling. ***If appropriate airfare cannot be found or time does not allow for compliance with The Local Government Travel Expense Control Act and Board approval prior to encumbrance of expense, the employee may not attend the conference unless they choose to not seek reimbursement for the travel.*** An employee may choose to receive reimbursement up to the cost covered by the District and pay the remainder themselves. For example, if the cost of airfare is \$1,100, the maximum amount covered by the Board is \$1,000, so the employee can choose to pay the \$100 themselves without receiving any reimbursement from any funds within the control of the District. This would include any student activity or special use funds.

Rental car: The maximum rate for rental cars is \$90 a day, this amount is for when teams travel and a larger vehicle is rented to accommodate the entire team. Rental cars, only if needed, should be within reason and should reflect economical restraint when ordering. It should only be as large as needed for the number of staff traveling. If a single employee is traveling and requires a rental car, the car should be the size of an economy or mid-sized vehicle. Again, if an employee chooses to upgrade, they do so at their own expense and may not receive reimbursement for the upgrade.

Taxis, black cars, Uber, Lyft: Such services can reduce the cost of travel if used to and from the airport away from the conference. Their use to and from a Chicago airport will only be reimbursed if those costs are below that of mileage and economy parking rates at a Chicago airport. If such services are used when traveling for the District, receipts are required. It should not be the expectation of staff to be shuttled to and from the airport by District staff unless there are special circumstances, such as a large group is going, and the departure and arrival times are during normal work periods.

If travel is required away from a conference hotel, reimbursement will require nature of travel on the receipt submitted. Staff may be required to give a detailed explanation as to the nature of the travel and why it is necessary for reimbursement.

Lodging: The maximum rate is \$250 a night, unless the conference rate is higher, this happens often and there is little control over conference rate hotels. If a staff member has a choice of hotels and the travel is not directly related to a conference, then the lodging should be as close as reasonable to the final destination and should be at a comfortable, reasonable hotel. If for some reason there is no hotel at or below the \$250 rate in the area, there must be enough time for the Board of Education to approve an exception to the policy at a regular scheduled Board meeting prior to travel, or booking a non-refundable room. The District will not be able to book a room above the rate without prior Board approval. It should also be noted that the rate the District is using is higher than the State or Federal government rate which were considered for this policy.

Meals & Incidental Expenses: It is important for staff to remember that when seeking reimbursement for food, when traveling, they should keep in mind that they are traveling on public educational dollars. As noted in all policies, public funds are never to be used for alcoholic beverages, if such items cannot be put on a separate receipt, please be clear as to what is asked for reimbursement.

The District is using the federal reimbursement rates for meals. Given the flexibility and the fact that the Federal Government has developed an independent system to evaluate costs per diem, using the federal system would also allow the District to manage the District’s resources. The federal rates are dependent on the location of the meeting. There are 6 different rates. There is a website that can be used to determine the per diem rate. For example, Chicago has a per diem rate of \$74, however other areas of the State have a rate of \$51 a day. The website to determine what rate to be used can be found here:

<https://www.gsa.gov/portal/category/100120>. The Meals and Incidental rate is in the last column.

The table below lists the six M&IE tiers in the lower 48 continental United States. Determine your Meal and Incidental expenditure (M&IE) rate and find the corresponding row to see the breakdown for each meal. The rates are by meal and will be reimbursed as such.

Per Diem Total	Breakfast	Lunch	Dinner	IE
\$51	\$11	\$12	\$23	\$5
\$54	\$12	\$13	\$24	\$5
\$59	\$13	\$15	\$26	\$5
\$64	\$15	\$16	\$28	\$5
\$69	\$16	\$17	\$31	\$5
\$74	\$17	\$18	\$34	\$5

The District will only reimburse for detailed receipts; it will reimburse for tax and tip as long as it is noted on the receipt. The District will not reimburse for candy, chips, or soda while traveling, beyond the \$5 IE reimbursement as noted in the chart above. It is expected that the reimbursement is for meals eaten while out on District business. Employees should refrain from the following examples of abuse of this policy:

- buying two meals for themselves,
- spending the entire amount on other meals because portions of the day are covered by conference fees or other sources,
- buying meals on their way to and from the Airport on the first and last day of the trip,
- buying groceries at a grocery store at the end of their trip,
- buying multiple pizzas for one meal,
- claiming one meal’s reimbursement on candy and soda,

- buying non-employee's meals

The purpose of the reimbursement for food is so that the employee is able to eat a reasonable meal while traveling. At times, this reimbursement may not cover the entire cost of food and employees may need to contribute their own funds. This is not any different from other organizations that reimburse meals while traveling. When food is provided as part of a conference registration fee, there is no reimbursement for that meal. For example, if an event includes a breakfast or lunch, those meals would be subtracted from amount of money eligible for reimbursement for that day. If breakfast and lunch are paid for by the conference through the conference fees already paid, the employee will only have as their maximum reimbursement for the dinner and the \$5 individual expense for that day. Meals in Chicago area airports will not be reimbursed.

Parking: The maximum rate for daily parking is \$60, however, if a staff member is flying and they park their car at the airport, the District will only reimburse at the economy parking rate for that airport. For example, the current rate at Midway is \$15 a day, if the staff member parks in valet parking at \$40 a day, they will only be reimbursed at \$15. The maximum rate of \$60 is in the event a person is at a conference at a hotel and must pay the daily rate of parking, as it is in Chicago.

Mileage reimbursement: The District will reimburse at the rate established by the Internal Revenue Service for travel to and from a conference for District travel. By submitting for reimbursement for vehicle travel expenses, an employee is also acknowledging that they have a valid driver's license, and current appropriate insurance under State of Illinois laws. If for any reason the employee does not have one of those things, they should review with their supervisor.

Depending on circumstances and the type of travel, the District may provide the use of a District vehicle for transportation. The District may also, at that time, supply a District credit card for fuel usage only. If a District credit card is used, a detailed receipt must be submitted for any use. Staff will need to provide a valid current driver's license to the business office prior to usage of any District vehicle.

Conference Reimbursement Request Procedures

1. Requests for reimbursement should be submitted within 7 business day after the completion of a conference. All original detailed receipts are required and must be organized by day. Tape to an 8 ½ x 11" paper with each day clearly written in the upper right-hand corner. Attendees will submit proof of attendance in order to process the reimbursement.
 - a. Daily meal reimbursement allowances will be based on the location of the conference. Refer to the Administrative Guidelines for Travel section, above for information regarding daily limits.
 - b. Mileage will be calculated based on the distance from home or school address to the conference venue. A printed copy of the map using Mapquest or GoogleMaps is required.
 - c. The following need to be included for any travel reimbursements:
 - Parking/transportation receipts.
 - Print-out of tolls paid.
 - The district will only reimburse for economy parking at airports.
2. Attendee will forward the Request for Reimbursement to the attention of the District staff member who processed the initial conference request.
3. Once the request for reimbursement is reviewed for compliance with Board policy regarding travel, the process of creating a requisition will be completed by the District staff member processing the request.
 - a. New employees will need to submit their home address for reimbursement.
 - b. Once the PO is generated, the appropriate administrator will authorize the disbursement. Payment of reimbursements will take place after the FOP meeting on the month that the reimbursement was placed on the bill list. Refer to the Board Book on the website.
4. Complete and correct requests for reimbursement that are received in the office of the Grant Administrator or appropriate administrator on or after the third Monday of a given month and on or before the second Friday of the next month will be processed for payment on the bill list for the following month. (Example: A complete and correct request received on January 12, 2018 would be processed for payment in February 2018. A complete and correct request received on January 16, 2018 would be processed for payment in March 2018.)