Conference Attendance Requests (CARs)

TRAINING PACKET/GUIDELINES

2017-2018

(Adm. Handbook Section 3.61)

Objectives

- Become familiar with current travel policies.
- Become familiar with recently revised travel forms.
- Know where to access supporting justification for travel activities.
- Have sufficient knowledge to complete and submit timely and accurate travel forms.

What's New…

- Developed a new travel form
- Revised existing travel forms
- Eliminated unnecessary travel forms

Group Conference Coversheet

Conference Attendance Request Form

Hotel Room Reservation Worksheet

Air Travel Worksheet

Conference Reimbursement Form

Conference Registration Worksheet

Conference Justification Form

Out-of-District Meeting Form

Key Terms

Conference vs. Out-of-District Meeting

Conference

- Conference includes in-state or out-of-state travel to an event such as a trade show, workshop, training or conference

Out of District Meeting

- Out of district meeting is defined in-state travel, but outside of the SUSD boundaries such as to visit other district programs, state offices (California Department of Education) or a county office of education (including SJCOE)

Out-of-State Travel

- Per Board Policy 3350, adopted 3/24/15, **Board approval will be required for all out-of-state travel for which reimbursement will be claimed**.
- Conference Attendance Requests (CARs) for out-of-state travel will not be processed without the required approval by the Governing Board.

CAR Packet

Individual CAR

- CAR, including event registration (one per person)
- Hotel Room Reservation Worksheet*
- Air Travel Worksheet*
- Conference brochure *(one copy only)*
- Map showing mileage *(one copy only)*
- Approved Board Agenda Item for Out-of-State travel *(one copy only)*

Group CAR (2 or more)

- Group Conference Coversheet
- Hotel Room Reservation Worksheet*
- Air Travel Worksheet*
- Conference brochure *(one copy only)*
- Map showing mileage *(one copy only)*
- Approved Board Agenda Item for Out-of-State travel *(one copy only)*
- CAR, including event registration (one per person)

*If applicable

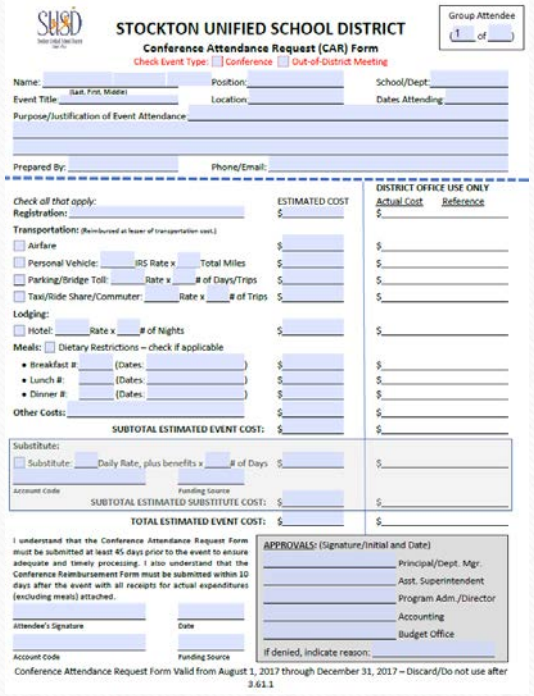
Important Facts About CARs

Important Facts:

- All SUSD employees, parents, and volunteers must submit a CAR
- The CAR is the mechanism to obtain approval **prior** to attending a conference
- CARs are to be submitted to Assistant Superintendent
- CARs are to be submitted **at least 45 days in advance of conference**

Forms

Conference Attendance Request (CAR) Form



STOCKTON UNIFIED SCHOOL DISTRICT

Conference Attendance Request (CAR) Form

Check Event Type: ☐ Conference ☐ Out-of-District Meeting

Group Attendee (1 of ___)

Name: _____ (last, First, Middle) Position: _____ School/Dept: _____

Event Title: _____ Location: _____ Dates Attending: _____

Purpose/Justification of Event Attendance: _____

Prepared By: _____ Phone/Email: _____

Check all that apply:	ESTIMATED COST	DISTRICT OFFICE USE ONLY Actual Cost	Reference
Registration: _____	$_____	$_____	
Transportation: (Reimbursed at lesser of transportation cost.)			
☐ Airfare	$_____	$_____	
☐ Personal Vehicle: _____ IRS Rate x ____ Total Miles	$_____	$_____	
☐ Parking/Bridge Toll: _____ Rate x ____ # of Days/Trips	$_____	$_____	
☐ Taxi/Ride Share/Commuter: _____ Rate x ____ # of Trips	$_____	$_____	
Lodging:			
☐ Hotel: _____ Rate x ____ # of Nights	$_____	$_____	
Meals: ☐ Dietary Restrictions – check if applicable			
• Breakfast #: _____ (Dates: _____)	$_____	$_____	
• Lunch #: _____ (Dates: _____)	$_____	$_____	
• Dinner #: _____ (Dates: _____)	$_____	$_____	
Other Costs: _____	$_____	$_____	
SUBTOTAL ESTIMATED EVENT COST:	$_____	$_____	
Substitute:			
☐ Substitute: ____ Daily Rate, plus benefits x ____ # of Days	$_____	$_____	
Account Code _____ Funding Source _____			
SUBTOTAL ESTIMATED SUBSTITUTE COST:	$_____	$_____	
TOTAL ESTIMATED EVENT COST:	$_____	$_____	

I understand that the Conference Attendance Request Form must be submitted at least 45 days prior to the event to ensure adequate and timely processing. I also understand that the Conference Reimbursement Form must be submitted within 10 days after the event with all receipts for actual expenditures (excluding meals) attached.

Attendee's Signature _____ Date _____

Account Code _____ Funding Source _____

APPROVALS: (Signature/Initial and Date)

_____ Principal/Dept. Mgr.

_____ Asst. Superintendent

_____ Program Adm./Director

_____ Accounting

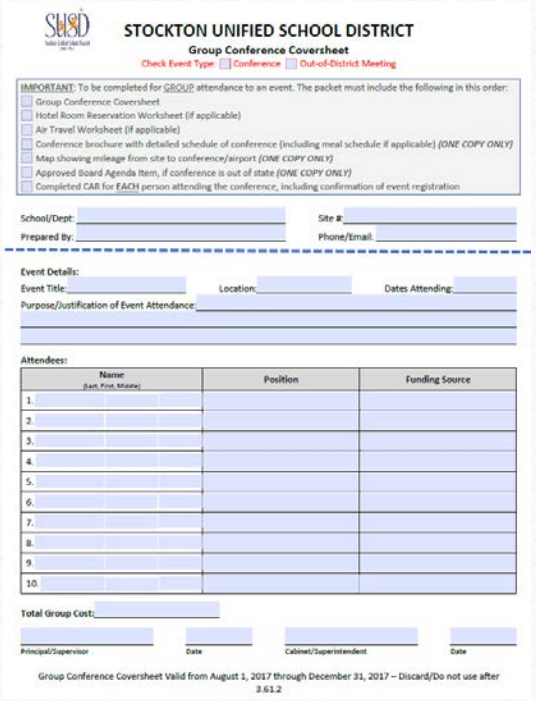
_____ Budget Office

if denied, indicate reason: _____

Conference Attendance Request Form Valid from August 1, 2017 through December 31, 2017 – Discard/Do not use after

3.61.1

Group Conference Coversheet



STOCKTON UNIFIED SCHOOL DISTRICT

Group Conference Coversheet

Check Event Type: ☐ Conference ☐ Out-of-District Meeting

IMPORTANT: To be completed for GROUP attendance to an event. The packet must include the following in this order:

- ☐ Group Conference Coversheet
- ☐ Hotel Room Reservation Worksheet (if applicable)
- ☐ Air Travel Worksheet (if applicable)
- ☐ Conference brochure with detailed schedule of conference (including meal schedule if applicable) *(ONE COPY ONLY)*
- ☐ Map showing mileage from site to conference/airport *(ONE COPY ONLY)*
- ☐ Approved Board Agenda Item, if conference is out of state *(ONE COPY ONLY)*
- ☐ Completed CAR for EACH person attending the conference, including confirmation of event registration

School/Dept: _____ Site #: _____

Prepared By: _____ Phone/Email: _____

Event Details:

Event Title: _____ Location: _____ Dates Attending: _____

Purpose/Justification of Event Attendance: _____

Attendees:

Name (Last, First, Middle)	Position	Funding Source
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

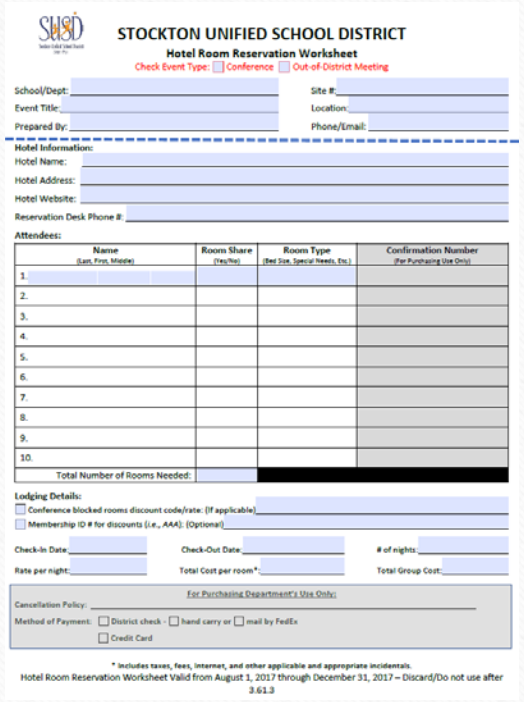
Total Group Cost: _____

Principal/Supervisor _____ Date _____ Cabinet/Superintendent _____ Date _____

Group Conference Coversheet Valid from August 1, 2017 through December 31, 2017 – Discard/Do not use after

3.61.2

Hotel Room Reservation Worksheet



STOCKTON UNIFIED SCHOOL DISTRICT

Hotel Room Reservation Worksheet

Check Event Type: ☐ Conference ☐ Out-of-District Meeting

School/Dept: _____ Site #: _____

Event Title: _____ Location: _____

Prepared By: _____ Phone/Email: _____

Hotel Information:

Hotel Name: _____

Hotel Address: _____

Hotel Website: _____

Reservation Desk Phone #: _____

Attendees:

	Name (Last, First, Middle)	Room Share (Yes/No)	Room Type (Bed Size, Special Needs, Etc.)	Confirmation Number (For Purchasing Use Only)
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
	Total Number of Rooms Needed:			

Lodging Details:

☐ Conference blocked rooms discount code/rate: (If applicable) _____

☐ Membership ID # for discounts (i.e., AAA): (Optional) _____

Check-In Date: _____ Check-Out Date: _____ # of nights: _____

Rate per night: _____ Total Cost per room*: _____ Total Group Cost: _____

For Purchasing Department's Use Only:

Cancellation Policy: _____

Method of Payment: ☐ District check - ☐ hand carry or ☐ mail by FedEx

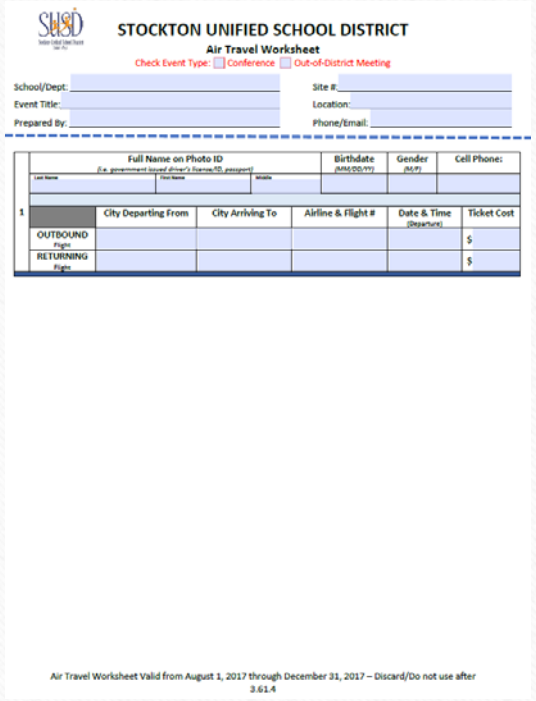
☐ Credit Card

* Includes taxes, fees, internet, and other applicable and appropriate incidentals.

Hotel Room Reservation Worksheet Valid from August 1, 2017 through December 31, 2017 – Discard/Do not use after

3.61.3

Air Travel Worksheet



STOCKTON UNIFIED SCHOOL DISTRICT

Air Travel Worksheet

Check Event Type: ☐ Conference ☐ Out-of-District Meeting

School/Dept: _____ Site #: _____

Event Title: _____ Location: _____

Prepared By: _____ Phone/Email: _____

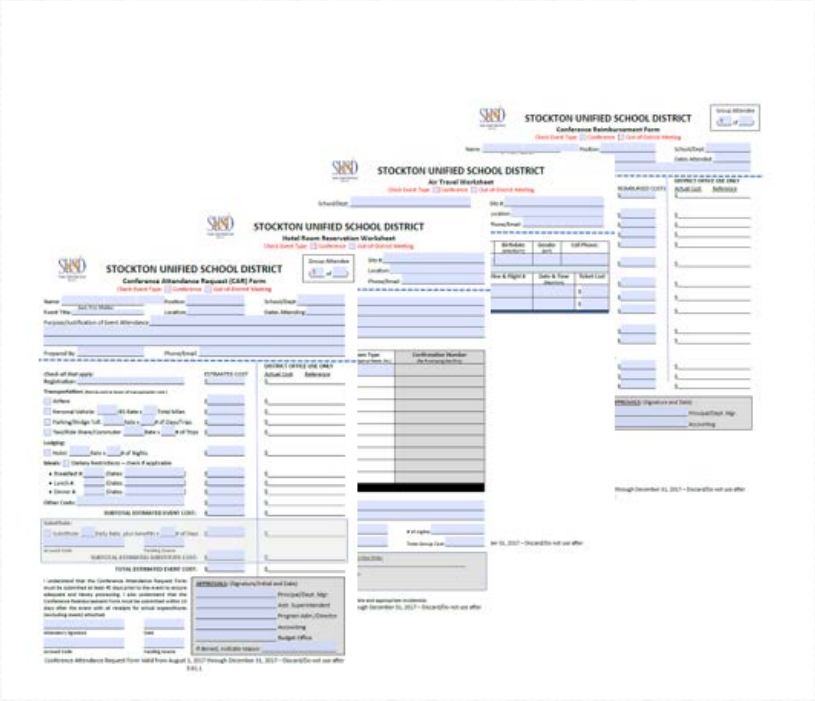
	Full Name on Photo ID (i.e. government issued driver's license/ID, passport)			Birthdate (MM/DD/YY)	Gender (M/F)	Cell Phone:
	Last Name	First Name	Middle			

1	City Departing From	City Arriving To	Airline & Flight #	Date & Time (Departure)	Ticket Cost
OUTBOUND Flight					$
RETURNING Flight					$

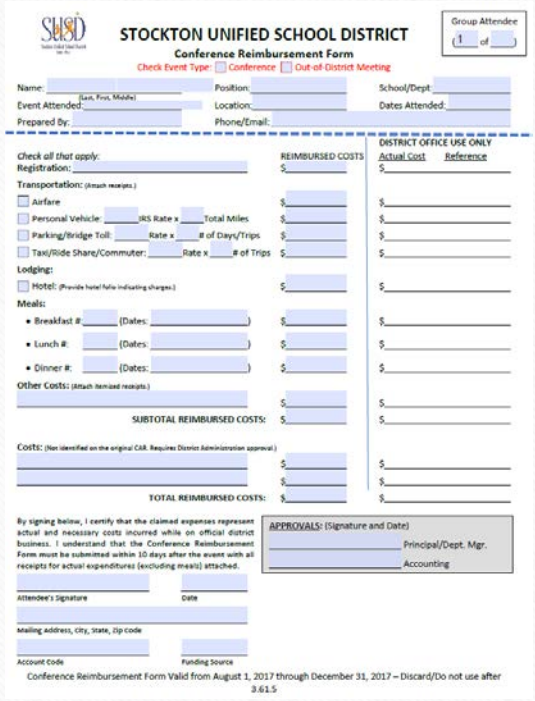
Air Travel Worksheet Valid from August 1, 2017 through December 31, 2017 – Discard/Do not use after

3.61.4

Individual CAR Packet



Conference Reimbursement Form



STOCKTON UNIFIED SCHOOL DISTRICT

Conference Reimbursement Form

Group Attendee (1 of)

Check Event Type: ☐ Conference ☐ Out-of-District Meeting

Name: (Last, First, Middle) Position: School/Dept:

Event Attended: Location: Dates Attended:

Prepared By: Phone/Email:

	REIMBURSED COSTS	DISTRICT OFFICE USE ONLY Actual Cost	Reference
Check all that apply: Registration:	$	$	
Transportation: (Attach receipts.)			
☐ Airfare	$	$	
☐ Personal Vehicle: IRS Rate x Total Miles	$	$	
☐ Parking/Bridge Toll: Rate x # of Days/Trips	$	$	
☐ Taxi/Ride Share/Commuter: Rate x # of Trips	$	$	
Lodging:			
☐ Hotel: (Provide hotel folio indicating charges.)	$	$	
Meals:			
• Breakfast #: (Dates:)	$	$	
• Lunch #: (Dates:)	$	$	
• Dinner #: (Dates:)	$	$	
Other Costs: (Attach itemized receipts.)	$	$	
SUBTOTAL REIMBURSED COSTS:	$	$	
Costs: (Not identified on the original CAR. Requires District Administration approval.)	$	$	
	$	$	
TOTAL REIMBURSED COSTS:	$	$	

By signing below, I certify that the claimed expenses represent actual and necessary costs incurred while on official district business. I understand that the Conference Reimbursement Form must be submitted within 10 days after the event with all receipts for actual expenditures (excluding meals) attached.

Attendee's Signature Date

Mailing Address, City, State, Zip Code

Account Code Funding Source

APPROVALS: (Signature and Date)

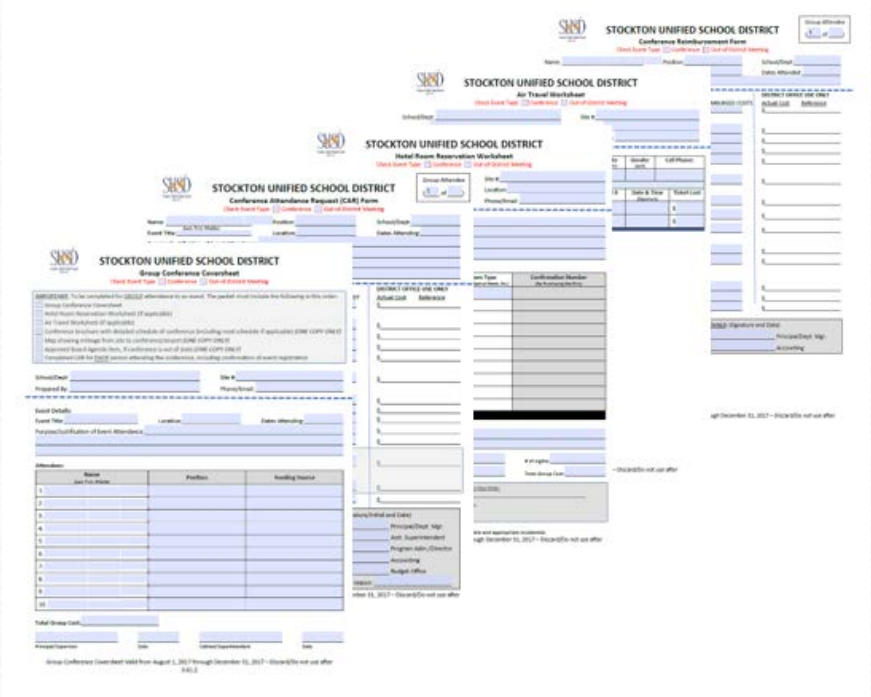
Principal/Dept. Mgr.

Accounting

Conference Reimbursement Form Valid from August 1, 2017 through December 31, 2017 – Discard/Do not use after

3.61.5

Group CAR Packet



Overview of CAR Completion

Preliminary Travel Preparation

- Check your budget for available funds
  - Have funds already been encumbered for other travel expenditures
  - Is a budget transfer needed?
- Gather conference/training information
  - Check for location, including travel and lodging
  - Check for dates, including if substitutes/coverage is needed
  - Check for included incidentals, such as breakfast or lunch provided
  - Check for group rates and early registration
- Gather preliminary attendee information
  - Who is going
  - What are their travel needs

Overview of CAR Completion

- **General Information:**
  - Enter attendee and event information
- **Registration:**
  - Register for event, include confirmation with the CAR
- **Transportation:**
  - Identify travel needs
    - Complete Air Travel Worksheet if flying
    - Print out map of mileage using Google Maps
    - Obtain supporting evidence of parking, shuttle fares to/from destination

Overview of CAR Completion – cont'd

- **Lodging:**
  - Identify lodging needs, if not identified in the brochure, print out estimate of hotel stay.
  - **DO NOT BOOK or HOLD HOTEL ROOM USING PERSONAL CREDIT/DEBIT CARDS.**
- **Meals:**
  - Identify meal needs, review travel policy for meal allowability
- **Other Costs:**
  - Identify other costs necessary, estimate a reasonable cost for conference-related materials

Overview of CAR Completion – cont'd

- **Substitute:**
  - Identify if substitute coverage expenses are necessary
- **Funding:**
  - Insert account code (ensure funds are available in the budget)
  - Insert funding source
- **Signatures:**
  - Obtain attendee signature
  - Obtain Principal/Supervisor signature

Overview of CAR Completion – cont'd

- **Group Travel:**
  - If part of a group, at the top right of the form indicate the attendee's number within the group of attendees
- **Routing:**
  - Route to Assistant Superintendent

CONTACT

E-mail address specific for travel questions, changes and inquiries:

travel@stocktonusd.net

Additional Guidance

Event Registration – Online

Conference Registration – Sites are to register attendee(s) to the conference

- Online registration – If a payment is required when registering online, choose one of the five payment types (in order identified below, as registration permits):
  1. Bill me later
  2. Purchase Order
  3. Check
  4. Credit card ONLY
  5. Mail-in registration ONLY

Event Registration – Internal Processing

1. Bill me later – an invoice will be sent to the attendee(s) or to the person registering
2. Purchase Order – enter "PO TO FOLLOW" if a PO number is needed to complete the registration
3. Check – enter "CHECK TO FOLLOW" if a check number is needed to complete the registration. Print the registration confirmation(s) and/or invoice(s) and attach to the CAR(s). It should show the information/registration number(s) and the payment instructions. Purchasing will process the requisition for the payment (PO or check) when the approved CAR(s) is/are received.
4. Credit card ONLY – If none of the above payment types are acceptable and the registration payment is by credit card ONLY, print and completely fill out the registration form(s) and attach to the CAR(s). Purchasing will register the attendee(s) online using the District credit card when the approved CAR(s) is/are received. Confirmation(s) will then be forwarded to the attendee(s).
5. Mail-in registration ONLY – Print and completely fill out the registration form(s) and attach to the CAR(s). Purchasing will process the requisition for the check and Accounts Payable will mail the check payment along with the registration form(s) to the vendor.

Transportation

TRANSPORTATION – Choose the most appropriate method of travel to and from the event. The mode of transportation will be determined based on the least expensive method. Carpooling is strongly encouraged.

A. Air Travel – Complete the Air Travel Worksheet and attach to the CAR(s).

Attendee's legal name MUST MATCH
the *government issued identification*,
i.e., driver's license/ID, passport

B. Personal Vehicle – Calculate mileage to/from the conference or to/from airport, if travel by air to the conference and attach a map printout to the CAR(s).

C. Other Expenses – Calculate/estimate parking, taxi, ride share, commuter, and bridge toll

D. *Other Costs – Calculate baggage fees and list them in the Other Costs section on the CAR.

Transportation - Air Travel

- Air travel is authorized when is determined that air transportation is advantageous to the conduct of District business. The most economical air travel must be used, including the use of discounted and special rates.
- The Air Travel Worksheet must be completed, attached to the Conference Attendance Request, and forwarded for approval.
- Ticket cost estimates may be determined by referencing online ticketing services such as www.southwest.com, www.kayak.com, and www.hotwire.com

Transportation - Air Travel – cont'd

- Upon receipt of the completed CAR, the Purchasing Department will purchase tickets in accordance with the policies outlined below. Purchasing will contact the originator in the event that alternate flights must be used or the actual ticket price exceeds the estimate by more than $50.
- The CAR must be submitted to Purchasing no later than 21 days prior to departure. It's the responsibility of the principal or department head to ensure that the CAR is submitted prior to the deadline.
- **Failure to submit the CAR prior to the 21-day deadline may result in unnecessary and excessive travel costs that will be charged to the originating school or department.**

Transportation - Air Travel – cont'd

- Charges for classes of service other than economy (e.g., Business or First Class) are considered privileged and ineligible except when travel in such classes would result in overall transportation cost savings.
- In an effort to minimize air travel costs, the following options will be considered and utilized:
  - Connecting versus nonstop flights
  - Departing earlier or later compared to the preferred departure time
  - Utilizing alternative airports
  - Utilizing alternative cities
  - Utilizing discount, low cost airlines
  - Exploring alternative arrival and/or departure dates

Transportation - Air Travel – cont'd

- To the extent permitted by law and rules of each airline, any frequent mileage, bonus points or premiums---such as discounts on future fares received as a result of travel on official District business---accrues to the District.

IMPORTANT NOTE:

- Cancelling flights and changing itineraries or flight times after tickets have been purchased is strongly discouraged because it results in excessive costs to the District.
- Please attempt to limit such modifications to instances of illness or emergency only.
- Please notify your site administrator in such cases.
- **Any costs for such modifications will be the responsibility of the originating school or department.**

Lodging

LODGING – Fill out the Hotel Room Reservation Worksheet and attach to the CAR(s). Email a separate copy to **travel@stocktonusd.net**.

- Personal credit/debit cards are NOT to be used to hold hotel room reservations.
- Purchasing will make the room reservation(s) and forward the confirmation(s) to the attendee(s) when the approved CAR(s) is/are received.
- Purchasing will process the payment either by check or credit card.
- If the approved CAR(s) is/are not received by Purchasing prior to the hotel cancellation deadline, the room(s) will be cancelled.

Meals

Current Rates:

BREAKFAST:	**$15.00**
LUNCH:	**$16.00**
DINNER:	**$28.00**

- Employees may not claim meals provided by the state, meals included in hotel expenses or conference fees, meals included in transportation costs such as airline tickets, or meals that are otherwise provided.
- You can find additional information regarding travel expenses on Board Policy 3350.

Meals – First Day of Travel

- First day of travel
  - Trip begins at or before 6:00 am - Breakfast may be claimed
  - Trip begins at or before 11:00 am - Lunch may be claimed
  - Trip begins at or before 5:00 pm - Dinner may be claimed

Meals – Continuing After 24 Hours

- Continuing after 24 hours
  - Trip ends at or after 8:00 am - Breakfast may be claimed
  - Trip ends at or after 2:00 pm - Lunch may be claimed
  - Trip ends at or after 7:00 pm - Dinner may be claimed

Meals – Factional Day of Travel

FOR TRAVEL LASTING LESS THAN 24 HOURS

Employees may claim breakfast and/or dinner, based on the following timeframes:

- Fractional day of travel
  - Trip begins at or before 6:00 am and ends at or after 9:00 am - Breakfast may be claimed
  - Trip begins at or before 4:00 pm and ends at or after 7:00 pm - Dinner may be claimed

Other Costs

Other Expenses – Calculate anticipated other expenses for conference related materials, for example books or Internet usage to complete conference/job duties.

Changes to Attendees

- If the site(s) deemed it necessary to replace an attendee(s) to a conference, a new CAR packet is required to be completed for the replacement(s).
  - Indicate on the top margin of the CAR who the person is replacing.
  - Submit the CAR(s) for approvals.
  - Notify Purchasing of the replacement.

Cancellations

Important Facts:

- Immediate notification to Accounts Payable ***and*** Purchasing of any cancellation(s).
- Site budgets are responsible for any penalties and/or non-refundable expenditures incurred. Such costs will be charged to the account(s) on the CAR(s).

- Registration
  1. The site is responsible for cancelling registration to an event.
  2. Notify Accounts Payable and Purchasing of the cancellation.

Cancellation (cont'd)

- Lodging
  1. Hotel room reservation(s) must be cancelled prior to the hotel cancellation deadline to avoid a penalty. Contact Purchasing by phone to cancel the reservation(s).
  2. If unable to contact, attendee may cancel the reservation(s) and forward the cancellation confirmation(s) to Purchasing and Accounts Payable.
- Air travel
  1. Contact Purchasing by phone at least 24 hours prior to the flight.
  2. If unable to contact, the attendee(s) may cancel the flight reservation(s) and forward the cancellation confirmation(s) to Purchasing.

Reimbursement of Travel Expenses

- Submit Conference Reimbursement forms no later than **ten days after the conference**.
- Attach a copy (preferably an approved copy) of the Conference Attendance Request form.
- Attach ***original*** receipts, if any, and a copy of the hotel folio showing the room charges for the time stayed and the amount the District paid. (This should net to zero.)

Board Policy

BP 3350 – Travel Expenses

- "The Governing Board shall authorize payment for actual expenses, including travel, incurred by any employee performing authorized services for the District.
- Reimbursement rates are noted below:
  1. Meal/Lodging Per Diem Allowance
     a. Per U.S. General Services Administration (GSA) website by City, State, or Out of Country (for Current Year)
  2. Mileage Allowance
     a. Per rate established by Internal Revenue Service (IRS) website (for Current Year)

BP 3350 – Travel Expenses – cont'd

- Travel by air will be prepaid by the District.
- Travel by car will be reimbursed based upon actual miles traveled.
- Vehicles should be shared whenever possible to minimize travel costs.
- No employee shall be entitled to reimbursement for automobile travel when he/she is offered District transportation, transported free of charge, or transported by another employee who is entitled to expense reimbursement.
- Employees shall make every effort to minimize the cost of expenses to the District and consider, when possible, taxi sharing, carpooling, or other available expense-saving measures.

BP 3350 – Travel Expenses – cont'd

- The District shall not reimburse personal travel expenses.
  - Personal travel expenses may include, but are not limited to:
    - Alcohol
    - Entertainment
    - Laundry
    - Expense for family members who are accompanying the employee on District-related business
    - Personal use of automobiles, and
    - Personal losses or traffic violation fees incurred while on District business

BP 3350 – Travel Expenses – cont'd

- The Board must approve, in advance, any conference or travel expenses for non-employees (students, residents, volunteers) as "representatives of the Board."
- The Superintendent or designee shall establish procedures for the submission and verification of expense claims. He/she may authorize an advance of funds to cover necessary expenses."

Leaving SUSD Employment

Leaving SUSD Employment

- Management reserves the right to approve or disapprove conference requests of staff members who are scheduled to either retire from the district or leave for other employment.
- We must be prudent in our efforts to protect the district's resources and use our resources only for the training of those staff members who will be continuing to work in our district.