


Doc Number: A-37		
Doc Name: Reimbursement for Attendance at a Conference, Seminar or Meeting		
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EXECUTIVE SUMMARY


The purpose of this policy is to establish the guidelines for expense reimbursements for attendance at a conference, seminar or meeting. It is the policy of the Agency that, where budget allocations permit, authorized employees shall be reimbursed for reasonable and necessary expenses incurred in the performance of official Agency business when such expenditures are authorized in advance and the employee's attendance is deemed to be directly beneficial to the Agency.

This policy is consistent with the Agency's business goal of Business Practices commitment of applying ethical, fiscally responsible principals to all aspects of the business and organizational conduct.

REVISION AND APPROVAL HISTORY

<i>REVIEWER</i>	<i>REVISED SECTION / PARAGRAPH / PAGE</i>	<i>REVISION</i>	<i>REVIEW DATE</i>	<i>RELEASED DATE</i>	<i>APPROVED</i>
<u>[First Last Name]</u>	<u>Entire Policy</u>	<i>XX</i>	<i>MM/DD/YYYY</i>	<i>MM/DD/YYYY</i>	<u>[First Last Name]</u>
<i>Stephanie Riley</i>	<i>Entire Policy</i>	<i>01</i>	<i>7/24/15</i>	<i>7/24/15</i>	<i>Christina Valencia</i>

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1. POLICY

It is the policy of the Agency that, where budget allocations permit, authorized employees shall be reimbursed for reasonable and necessary expenses incurred in the performance of official Agency business when such expenditures are authorized in advance and the employee’s attendance is deemed to be directly beneficial to the Agency.

2. PURPOSE

The purpose of this policy is to establish the guidelines for expense reimbursements for attendance at a conference, seminar or meeting.

3. SCOPE

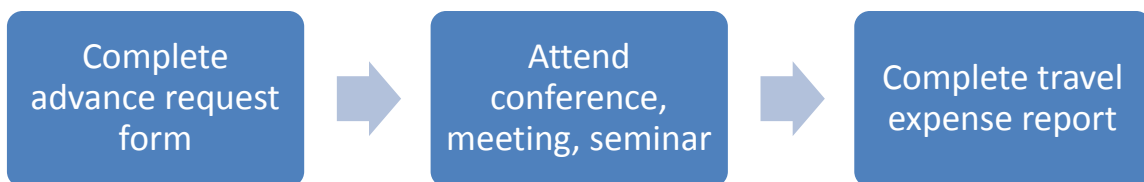
For the purposes of this policy, “authorized employees” shall include all regular employees and Board Members, and does not include intern, temporary, or limited-term staff.

4. DEFINITIONS

None.


5. PROCEDURES

5.1 Process Flow –



5.2 Authorization to Attend

- A. Agency employees shall secure the approval of their department manager and executive manager prior to attending a conference, seminar or meeting on an [Attendance and Advance Request form](#) (available on [AIM](#)).
 - 1. If overnight accommodations are required, the General Manager [Attendance and Advance Request form](#) and approve the [Travel Expense Report](#) (available on [AIM](#)).
- B. Due to the limited appropriation of funds, approval for local conference, seminar and meeting attendance shall be given highest priority.
- C. When possible, the employee should submit the [Attendance and Advance Request form](#) as early as possible to assure that adequate funds are available in the Agency’s Annual Budget.

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- D. The employee should refrain from expending funds (i.e., registration, transportation, accommodations, etc.) prior to securing appropriate approval.
 - 1. Any expenses incurred prior to securing approval may not be reimbursed by the Agency.

5.3 Expenses

A. Accommodations


- 1. Reimbursement for the cost of overnight accommodations for a conference, seminar or meeting shall be limited to the reasonable cost of adequate accommodations, as determined by the General Manager.
- 2. Costs which are deemed to be unnecessary, unrelated or excessive will not be reimbursed or paid by the Agency.

B. Transportation

- 1. An Agency vehicle shall be utilized when practical.
- 2. Other transportation to a conference, seminar or meeting shall be reimbursed or paid directly by the Agency.
- 3. To secure the most economical mode of transportation in keeping with availability, convenience and propriety of the Agency, all travel arrangements shall be made with the endorsement of the respective Executive Manager.
- 4. When air travel is the most appropriate method of transportation, coach class shall be utilized.
- 5. An Agency vehicle shall be used when appropriate. Employees paid an auto allowance should use their personal vehicles when attending a local event.
- 6. Employees may use an Agency vehicle if other Agency employees are attending and carpooling to the event.
- 7. A private automobile may be used when necessary. Reimbursement for such shall follow the guidelines in the Agency Vehicle Use Policy, and mileage reimbursement shall be paid at the IRS approved rate if the employee does not normally receive an automobile allowance.
- 8. A rental car may be used when appropriate public transportation is unavailable or more expensive.
- 9. Shuttle and metro services should be used when most appropriate in lieu of a taxi or car rental.

C. Expenses

- 1. A \$50 per diem rate guideline has been established for Agency employees. Employees shall receive attendance approval by the appropriate level of management as provided prior to receipt of an advance for travel and/or related expenses for attendance at a conference, seminar or meeting.
- 2. The advance is to be used for meals and other miscellaneous expenses, such as parking fees, not including major transportation or registration fees.
- 3. Advances should be requested two weeks prior to the conference, seminar or meeting so that payments can be made prior to the dates of the trip.

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4. If it is necessary to use an Agency credit card, it should be limited to registration and air travel.
5. Except as otherwise provided, the guidelines for meal reimbursements, including tax and tip, shall be a maximum of \$50 per day with suggested limits as follows: breakfast \$10; lunch \$15; dinner \$25.
6. If the indicated guidelines are exceeded, written justification must be attached to the [Travel Expense Report](#) or approval must be obtained in advance for locations where these amounts may not be practical.
7. Alcohol consumption and entertainment expenses will not be reimbursed.
8. Within fourteen (14) days following attendance, the employee shall submit the completed [Attendance and Advance Request form](#) and the [Travel Expense Report](#) (available on [AIM](#)).
9. Original receipts are required for all expenses including those for meals, taxi, bus fares, parking, etc.
10. An employee will be required to reimburse the Agency for the amount of an advance that cannot be justified with original receipts.
11. Expenses that cannot be justified and are deemed unreasonable will not be reimbursed.
12. All applicable receipts and/or invoices shall be attached to the [Travel Expense Report](#).
13. The employee shall forward this form to the respective Department Manager, Executive Manager and in the case of Executive Managers or when overnight accommodations are involved, to the General Manager, for approval.

5.4 Registration

- A. Registration and related fees shall normally be reimbursed or paid in advance by the Agency for all authorized attendance.
- B. An Agency credit card may be used for the payment of registration fees.

5.5 Employee Compensation

- A. An employee who attends a conference, seminar or meeting on his/her regularly scheduled workday shall receive his/her regular compensation for such attendance.
- B. If a non-exempt employee attends a non-voluntary conference, seminar or meeting on his/her scheduled day(s) off, such attendance shall be compensated and counted as hours worked.
- C. A non-exempt employee who travels during his/her normal working hours shall be compensated for travel time as hours worked.

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6. RESPONSIBILITIES

6.1 Manager of Finance and Accounting - Overall administration and periodic review of this policy.

7. REFERENCES

7.1 [Attendance and Advance Request form](#) (available on [AIM](#))

7.2 [Travel Expense Report](#) (available on [AIM](#))