
PROFESSIONAL DEVELOPMENT TRAVEL GUIDELINES

Purpose

CCPS recognizes that travel can be inconvenient, placing demands on employees and individuals traveling on CCPS approved business, including parents, students, etc., that sometimes impact personal time and activities. CCPS appreciates the efforts that employees make to meet the challenges of a busy travel schedule. The following guidelines are provided to help CCPS employees make decisions regarding professional development travel expenditures that will:

- result in the lowest total cost
- meet all necessary business objectives
- provide convenience and safety for employees

Objective

These guidelines have been developed to reflect the basic trust in the integrity of our employees. All employees need to understand that they are an integral part of the school system's efforts to make these guidelines effective.

It is CCPS practice to reimburse employees for all reasonable business expenses within approved travel guidelines and spending limits incurred on behalf of CCPS. Each employee has a stewardship responsibility for these expenses and should work toward keeping them as low as possible.

These guidelines are applicable to all associated except where bargaining unit agreements differ for employees covered by such agreements.

General Travel Planning

Prior approval must be obtained before departure and travel reservations can be paid. Approval differs for various staff members. Refer to Schedule A for approval guidelines and please note that all costs need to be included on the permission form. In addition, please attach a copy of the registration/conference agenda to the permission form. Consider total costs and how one element of travel expense can either increase or decrease another. Also, consider the time it takes to travel using various means of transportation available to you. Advances are issued approximately two weeks prior to departure date and are issued to each individual. Cash advances for the meal portion of a trip's cost are required. No meal costs can be charged on a BOE procurement card. This includes meals eaten in your hotel that would often appear on your hotel folio upon check out. Since meal per diems will be issued to each individual traveler in a check, paying for a meal on a procurement card is a duplication of the allowable expenses. Meal per diem does not require receipts and are issued to cover all food costs during travel status.

When an advance is received for any other type of travel expenses, receipts are required and leftover funds must be returned. The receipts and leftover funds should be attached to a completed "Travel Reconciliation Worksheet". This worksheet, along with the receipts must be returned to Finance within thirty (30) calendar days of trip completion.

If you are combining personal travel with business travel, your reimbursement will be limited to the most economical expense that would have been incurred in traveling on the most direct route, between the location of CCPS business and the employee's home location.

Before planning a trip, review the reasons for the trip. Is there more than one employee from the work group attending? Could one person participate and provide or communicate the information needed? If it is a one-day professional activity, could it be accomplished via a teleconference or videoconference rather than a trip? If it is a one-day professional activity and you need to attend, can it be scheduled to avoid an overnight stay?

Commercial Air Travel, Train, Hotel and Car Rental using Globetrotter Travel

(contact info: <http://www.carrollk12.org/Assets/file/Financial%20Services/Globetrotter%20Travel%20Contact%20Information.pdf>)

All air and train travel, hotel accommodations (when not included in a conference package), and car rentals must be arranged and booked through Globetrotter Travel. The Board of Education has approved the use of the State of Maryland contract with Globetrotter Travel for the procurement and arrangement of travel services. The purpose of this contract is to centrally manage and monitor Board travel expenses. The objective is to establish a convenient, service oriented, corporate travel mechanism that provides efficient and economical travel services for official Board of Education business. Globetrotter has established negotiated fares with many of the largest domestic and international airlines, hotels and car rental companies.

Individual procurement cards will be blocked for air and rail travel. All air and rail travel will be billed to one central P-card.

Process

1. Complete the appropriate travel request form (ATSP Professional Development Form, A&S Professional Development Form, or CCPS Permission Form for Professional Development). All forms are available on the CCPS web site.
2. Once all authorized signatures have been obtained, forward the travel request form along with a copy of the conference itinerary and registration to the Finance Office.
3. A travel approval number will be assigned, and Globetrotter Travel will be notified of the approved trip and attendees.
4. The Finance Office will give the employee the travel approval number.
5. The employee contacts Globetrotter Travel to make the arrangements.

Note: Globetrotter Travel will only work with those employees that have been authorized to travel and have a valid travel approval number.

Air Travel

- All air travel arrangements must be made through Globetrotter
- All air travel will be billed to one central P-card

The following criteria will be used by Globetrotter in obtaining the lowest logical airfare:

- Departure and arrival times - to be determined by the time of training or conference being attended, i.e. early morning conferences would require previous day travel
- Direct flight vs. connecting flights - if using a connecting flight, only minimal lay-over times will be considered
- Flight options - flight options within a \$50 range of the lowest fare will be presented to the traveler for final choice
- Lead time - **to obtain the lowest possible airfare, a minimum of 6 weeks is required; 90 days is preferred**
- Frequent flyer accounts - personal frequent flyer accounts will not be considered in determining and selecting airlines

Hotel

- All hotel arrangements must be made through Globetrotter with the exception of conferences and events that include hotel accommodations
- A personal credit card or individual procurement card is used for payment
- Hotel accommodations may be approved for official BOE travel that occurs more than 75 miles one way from Westminster.

The following criteria will be used by Globetrotter in obtaining hotel arrangements:

- Hotels will be categorized by Tier 1 and Tier 2 facilities.
 - Tier 1 would have a 2 – 3 star rating, examples are as follows: Sheraton, Ramada, Comfort Inn, Quality Inn, Days Inn, Holiday Inn, and Hampton Suites.
 - Tier 2 facilities would have a 4-star rating, examples are as follows: Hilton, Hyatt, Marriott, Embassy Suites, and Wyndam.
- Tier 1 properties will be offered first and are recommended.
- The following exceptions may justify accommodations at a Tier 2 facility:
 - Location and proximity to the event - will additional costs be incurred for transportation to and from the event
 - Safety of employee
 - Excessive parking fees

Car Rental

- If a rental car is approved, arrangements must be made through Globetrotter
- All other rental car arrangements are the responsibility of the traveler

Rail Travel

- All rail travel arrangements must be made through Globetrotter
- All rail travel will be billed to one central P-card

General Information

- If family will be traveling with the employee, separate arrangements can be made through Globetrotter using their Personal Travel division, which can also be used for personal vacations. A personal credit card must be used for these travel arrangements.
- If an employee requests to either leave early for a conference, or extend their stay, approval will be given only if there is no increase in travel costs to the BOE. If additional travel costs would be incurred, the employee may opt to pay the difference on their own.
- It is preferred that all travel be booked as far in advance as possible, however, it is also understood that this is not always possible. Reports will be generated on a monthly basis by Globetrotter listing all travel, time of arrangements, and potential savings that may have been lost due to late bookings. Consistent late bookings by an individual may result in travel requests being denied.

Personal Automobile

You will be reimbursed for the personal use of your car at the current CCPS mileage rate and for parking and tolls. You must comply with all motor vehicle laws and regulations before using a car on CCPS business. Reimbursement for the use of a personal car cannot exceed the lowest alternate method of transportation and reimbursement should be measured based on the most direct route unless a deviation is business-related such as picking up another employee while on route. Personal automobile insurance and normal commuting expenses are not reimbursable. Reimbursement is provided for business-related mileage in excess of normal commuting mileage. Total mileage reimbursement is authorized when travel requires an overnight stay or when travel is to an airport, bus terminal, or train station for further travel to a distant location.

Consider whether the use of your personal car is practical, on a trip by trip basis, based on these factors: the cost of mileage, the amount of time required to drive, how long you will be away, and the resulting parking costs. Whenever possible, satellite parking should be used. Perhaps an alternate means of transportation, such as a shuttle service would be preferable, in some cases. Keep in mind that there are CCPS pool vehicles available for travel. Check into the availability of these vehicles before using a personal vehicle.

Daily Meals & Conference Refreshments

The daily allowable cost for meals, including associated tax and gratuities, is \$45 per diem. A check request is required and should be submitted as an advance. This cash advance is issued to cover all food costs during travel status provided that meal costs were approved on your permission form.

Accounting for Expenses

In order to account for expenses associated with the trip, obtain receipts (except for food), summarize and attach them to the check request for reimbursement or, in the case of an advance, with the summary of expenses. Your immediate supervisor should approve all expenses, unless higher approval is required in accordance with the schedule of authorization. A copy of the itemized hotel bill needs to be submitted upon return of the travel status.

The following is a list of expenses that will not be considered for reimbursement or require higher than immediate supervisor approval. Questions should be discussed with your supervisor.

Expenses Not Reimbursable: (This list is not all inclusive)

- In-room movies at hotel
- Mini-bars
- Laundry and valet services
- Membership fees for Airline and Frequent Flier Clubs
- Membership for health clubs
- Hotel club memberships
- Incremental costs of double over single occupancy rates when a spouse or guest is not in an authorized travel status
- Excess baggage charges for personal luggage
- Pet care
- Hotel charges associated with cancellation where reasonable prudent actions were not take to avoid such charges
- Air flight and travel insurance
- Loss of personal funds and property
- Parking tickets or traffic violations
- Clothing/personal items
- Personal charge/credit card fees
- Airline upgrades
- Child care expenses
- All expenses for spouse or guest
- Special events, entertainment, tours, etc., sponsored by the conference

Travel Guidelines

Schedule A

Prior approval is required for travel. Depending on the type of staff member, approval varies. Non-duty days, including weekends, require prior approval. The term associates may refer to a parent, student, or other individual on CCPS approved travel.

One Day Professional Activities:

<u>Employee</u>	<u>Approvals</u>	<u>Form Required</u>
All Staff other than Supt. Cabinet, A&S, ATSP	Supervisor Principal/Cost Center Admin. Director of Cost Center	Permission Form for Inservice/ Professional Development

One Day Professional Activities with expenses other than meals and mileage:

<u>Employee</u>	<u>Approvals</u>	<u>Form Required</u>
Supt. Cabinet A&S, ATSP	Immediate Supervisor	Permission Form for Inservice/ Professional Development

Overnight or Multi-day Professional Activities:

<u>Employee</u>	<u>Approvals</u>	<u>Form Required</u>
All Staff	Supervisor Principal/Cost Center Admin. Director of Cost Center Asst. Superintendent	Permission Form for Inservice/ Professional Development

A&S employees may have prior approval through the A&S Professional Development fund. There is a limit of one workshop or conference per year and maximum reimbursement is \$1,500. Applications are submitted to the approval committee for screening by October 15.

<u>Approvals</u>	<u>Form Required</u>
A&S Prof. Dev. Committee Immediate Supervisor Director of Human Resources Asst. Superintendent	A&S Prof. Dev. Fund

ATSP employees may have prior approval through the ATSP Professional Training Development Fund. There is a limit of \$1,500. Applications are submitted to the Director of Human Resources.

<u>Approvals</u>	<u>Form Required</u>
Supervisor Director of Human Resources Asst. Superintendent	ATSP Prof. Training Development