

Overnight Travel and Professional Development Activity Guidelines



Attending conferences and other professional meetings is an important component to professional learning. We all feel the need to enhance our skills and broaden our perspective. Employees must use the online Travel/Professional Development Request System to request and be reimbursed for expenses related to professional development and overnight travel. The link for the Travel/Professional Learning Request System can be accessed by going to the [Employee Dashboard](#) and clicking on the Travel/Professional Learning Request System icon.

Activities Must be Approved by a Supervisor

The Board of Directors will not be liable for any legal action or any expenses incurred by a staff member unless the Travel/Professional Development request is approved by the supervisor or a member of the Agency Planning Council prior to leaving or attending the professional development activity. Professional development expenses, regardless whether occurring inside or outside Heartland AEA's service area, require advanced approval. For those covered by the Learning and Leadership Planning Council, advanced approval will come from the Professional Learning Committee, your supervisor and the applicable Budget Manager. For those covered by the Shared Services Planning Council, advanced approval will come from your supervisor.

If an agency staff member is approved for a professional development activity or any activity requiring overnight travel, these guidelines must be followed.

Procedures For Overnight Travel and Professional Development Activities

Submitting a Request

- Submit the maximum estimated expenses including lodging options, registration fee information and the airline arrangements section (if applicable) using the online system. Provide a link to any conference agenda/brochure materials. Travel requests for professional development activities require a link to the conference brochure/website (if applicable) to be included on the request when submitting for approval.
- Submit the request to your supervisor for approval. Requests should be submitted far enough in advance to allow your supervisor to approve the request **60 days or more before the travel date**, so airline tickets can be purchased at the lowest rates possible. Initial approvals and all approved revisions are required to receive any reimbursement and to be covered by agency insurances. The online form will be available to you after the trip and/or professional development activities have been approved.

Airline Travel

- For requests requiring airline travel, Mary Heaberlin, Accounts Payable Specialist, should receive the approved online travel form at least 60 days in advance of the departure date.
- The Agency will purchase all air transportation tickets. Flights generally will be booked only from Des Moines to the destination city and back. Changes in any airline travel plans require advanced re-approval. Please also notify Mary Heaberlin, Accounts Payable Specialist, if your travel plans change. If a medical or bereavement emergency arises that would prohibit or change travel as planned, contact your supervisor or a member of the Agency Planning Council as soon as possible for direction. It is the staff member's responsibility to minimize all transportation, lodging and registration cancellation fees. Failure to do the above may result in your liability for any expense incurred or obligated.
- The Agency will fly you out the day before the conference begins and fly you back the day the conference ends, unless the returning flight arrives in Des Moines later than 11:00 p.m. or other circumstances apply.
- Mileage to and from the airport will be reimbursed only for the miles that exceed the distance from home to office. However, on non-scheduled workdays no commuting deduction (home to office) is required.

- Driving in lieu of flying:
 - When driving to a conference or meeting site instead of flying, obtain the cost of airfare from the Accounts Payable Specialist prior to trip approval (i.e., at least 60 days in advance). The cost of airfare (including any travel agency or booking fees) will be the maximum reimbursement amount allowed for driving to a conference or meeting site. Maximum reimbursement amounts include, but are not limited to, mileage, parking, extra meals and additional lodging resulting from driving instead of flying. If staff members carpool, then the total maximum reimbursement amounts will be limited by the sum of the airfare costs the Agency would have purchased.

Parking

- Parking fees at an airport, hotel or conference site will be reimbursed (unless limited above by driving in lieu of flying). Economy lot parking is encouraged. A receipt must accompany parking fees.
- Staff should choose the ground transportation with the lowest reasonable cost to and from the hotel and airport.

Lodging/Hotels

- Hotel charges will be paid at the single rate unless occupied by two or more parties. When a room is shared between two or more parties, each party must register separately at check-in time and request a split bill. Each party must pay their shared cost individually. Room charges are not to be billed directly to the Agency. Room charges are to be itemized by person, by day, reflecting nightly room charge and applicable taxes. **Do not have one staff member pay the whole bill and then have the other staff member personally pay back one-half the cost.** Deduct all personal expenses and telephone calls from your bill before figuring the amount to submit for reimbursement. Use of online bookings like Hotels.com or Travelocity.com may not provide sufficient evidence for reimbursement.
- Agency staff should determine if they qualify for a lower government and/or state rate. Many times either your business card or an acknowledgement on agency letterhead will verify public employment at check-in. A Heartland AEA identification card can be obtained from the Human Resources Assistant. For lodging within Iowa, agency staff are encouraged to stay at a hotel offering a reduced state rate if it is within a 10-mile radius of their final destination. A list of Iowa hotels that offer reduced state rates is available from the Iowa Dept. of Administrative Services. The maximum the Agency will reimburse for in-state lodging is \$93 plus taxes per night.

Registration Fees

- All registration fees require a purchase order unless being paid personally.
 - Purchase orders are generally paid after the conference is attended. With Business Office approval, exceptions may be approved including, but not limited to, high cost registration fees, fees that must be pre-paid or vendors that do not accept purchase orders.
 - Employees should take advantage of early bird discounts if offered. Higher registration costs due to missed early bird discounts will be considered the same as a late fee. Conference-related membership dues or fees will not be reimbursed.
 - If fees are paid personally, reimbursement will occur after the conference is attended.
 - Registration fees must be receipted.
- Registration late fees or penalties for non-attendance are not reimbursable unless caused by the Agency.
 - If the conference is not attended due to an employee's personal situation, the employee will be responsible for all fees and associated costs.
 - If an employee determines that they cannot attend the conference the employee registered for, it is the employee's responsibility to contact their supervisor to determine next steps. Next steps may include finding a substitute to attend or contacting the conference to cancel the registration. In addition, contact Mary Heaberlin to inform her of these changes.

- Specifically identified costs for college credit, CEUs and memberships are not reimbursed unless part of a registration fee at no additional cost. The Agency will not reimburse additional fees for employees to receive CEUs or college credits in conjunction with conference attendance.
- If your registration fee is paid online via credit card, submit documentation of the fee and a receipt of payment.

Procedures for Reimbursement

- No claim will be paid unless it is submitted using the online Travel Expense form and all reimbursement procedures have been followed.
- Claims will not be paid unless the trip and estimated amounts of expenses were approved prior to the travel.
- Upon return, complete the Actual Expenses on the online form, scan and attach all original receipts (credit card receipts are not acceptable) and submit the form online. Reimbursement claims should be submitted within one month of the occurrence.
- After being reviewed by the Business Office, the claim will be forwarded to the Chief Financial Officer or designee for review and approval to pay.
- Copies of approved claims will be available online to staff members for their income tax records.
- All receipts for meals and other expenses must be itemized.

Allowable Expenses – 2021-22

Mileage

- **\$.41 cents a mile**

In-State Allowable Expenses

Maximum reimbursed expenses are limited to *actual costs*, not to exceed daily limits of:

- **Lodging: \$93 plus tax** for lodging within the state of Iowa.
- **Meals: *Actual cost* for meals are not to exceed a maximum of \$35 per day (including tax and tips)** if an overnight stay is required. Otherwise, if an overnight is not required, an employee may claim actual costs **not to exceed \$15 per day (including tax and tips).**

Out-of-State Allowable Expenses

The following limits are the maximum that will be reimbursed:

- **Lodging: *Actual cost* not to exceed a daily limit of \$175 plus tax.** If the staff member is staying at the conference hotel and that rate is higher, reimbursement will be made at the higher conference hotel rate plus tax. If the conference hotel is full, the conference hotel rate will be the maximum reimbursable rate.
- **Meals: *Actual cost* not to exceed \$50 per day (including tax and tips).**

Reminders

1. No reimbursement is allowed for non-work related phone calls from hotel/motel and recreation expenses.
2. Staff members are encouraged to share rooms where practical.
3. Hotels/motels are not to bill Heartland AEA directly for an individual's lodging or meals, and each staff member needs to register, be billed and pay separately.
4. Alcohol purchases should not be listed on submitted receipts. Please request a separate bill if you purchase alcoholic drinks with your meal.

Please submit your completed claim as soon as possible after your travel or professional development activity to avoid a delay in reimbursement.