

## **F. CONFERENCE/WORKSHOP/SEMINAR/MEETING & TRAVEL GUIDELINES**

### **Conference/Workshop/Seminar/Meeting Travel Guidelines**

All Conference/Workshops/Seminars/Meetings will be referred to as the "Event" unless specifically stated. The following rules and responsibilities shall govern the reimbursement of travel costs incurred by Association officers, employees, and attendees who have been duly authorized to perform travel.

### **Pre-Approved Conferences/Meetings**

- A. Conferences/Meetings are limited to CTA conferences, NEA conferences, ~~and~~ CTA State Council Meetings and San Gorgonio Service Center Council Meetings. A majority vote via email from all voting Executive Board officers may suffice for approval of attendance at events.
  - a. TVEA Executive Board will pre-approve the number of participants who will attend the different CTA/NEA conferences, based on needs and budget. This may be adjusted only by a vote of the Executive Board.
    - i. Pre-Approved CTA Conferences with baseline attendees:
      1. Fall Leadership conferences - 15 attendees
      2. Issues, LGBTQ+, Equity and Human Rights - 2 attendees each
      3. Good Teaching - 15 attendees
      4. President's Conference - 2 attendees (President and Vice President)
      5. Summer Institute - 8 attendees
      6. Special Education Conference - 10 attendees
    - ii. NEA Representative Assembly Total TVEA Delegate Allocation
    - iii. CTA Quarterly State Council Meetings - All Representatives
    - iv. San Gorgonio Service Center Council Meetings - All Representatives
- B. Curricular Support Grants, requests must be submitted to the Executive Board prior to attendance. [Curricular Support Grant Request Form](#). Reimbursements are limited to no more than \$250 for a one day event and no more than \$500 for a weekend event.

### **Attendee Selection Process**

- A. TVEA reserves the right to add and remove any attendee to the list of those attending the event based on budgetary restrictions.
- B. TVEA will base their decision on who attends or does not attend the event based on the following criteria
  - a. First time attendee
  - b. Number of times member attended that specific event
  - c. Number of times member attended events
  - d. Leadership position
  - e. Subject material being discussed at the event and the relevance to the attendee and their position in which they work (ie. Kindergarten teacher, counselor, subject material taught etc.)
  - f. Professional conduct at previous events
  - g. Failure to comply with the Responsibilities/Duties requirements from a previously attended event

### **Event Registration**

- A. Attendees will be asked to register themselves for the event.
  - a. Forward registration confirmation to [tveducators@gmail.com](mailto:tveducators@gmail.com) upon receipt.
  - b. Print receipt to submit with Reimbursement Request.

### **Overnight Stay Guidelines**

- A. Attendees will be asked to book their hotel for the Conference.
  - a. Local Conferences (Palm Springs, Orange County, San Diego)
    - i. Attendees may book Friday Night Lodging for Saturday only Conferences
    - ii. Attendees may book Friday and Saturday Night Lodging for Friday - Sunday Conferences
    - iii. Attendees may book Thursday Night Lodging when attending Friday Pre Conferences upon request and approval of the TVEA President.
  - b. Travel Conferences (Northern California, Outside of CA)
    - i. Attendees shall book lodging in time to attend conferences/meetings on time. TVEA will reimburse lodging no more than one day in advance or one day after the event when necessary and upon request and approval of the TVEA President.

### **Sub Release**

- A. TVEA will cover Substitute Release pay when attendance at a Conference or Meeting occurs during the school day. TVEA will not cover Substitute Release pay when there is ample time to travel to the conference after school to attend a Friday evening Conference event.
  - a. Substitute Release pay must be requested and approved by the TVEA President prior to booking a substitute.
- B. CTA will sometimes cover Sub Release for Pre-Conferences. Follow the guidelines for requesting CTA to cover sub pay through the registration process.
  - a. Notify TVEA if you are planning to attend a Pre-Conference and have requested a Sub paid by CTA.

### **Expense Reimbursement**

- A. **Local Conferences (Palm Springs, Orange County, San Diego)**
  - a. Attendees will be notified in advance of the event what they may request reimbursement for. Attendees will most often be reimbursed for:
    - i. Registration costs for approved conference
    - ii. Lodging. Up to standard room rates for hotels associated with the approved conference. Taxes & Resort Fees are included. Members are responsible for any incidentals or upgrades.
    - iii. Members will be encouraged to share a room with a TVEA Member when possible. In this case, lodging will be covered for attendees.
    - iv. Members who wish to have their own room will be required to cover one night of lodging.
    - v. Mileage. Transportation by personal automobile for round trip by nearest traveled highway at the current IRS rate per mile. A Mileage Reimbursement form must be submitted with the Expense Reimbursement Form.
    - vi. Parking. Hotel self parking at daily rate.

- vii. Meals will be reimbursed at the actual amount paid subject to the following guidelines:
  - 1. The maximum allocation for dinner shall be \$40 and daily allocation for food shall be \$85.00.
  - 2. No reimbursement shall be provided for meals that are included as part of the events package. Ie. If brunch is served, breakfast nor lunch receipts will be reimbursed.
  - 3. Extra meal expenditures due to earlier or later travel are not reimbursable. Ie. Meals outside of Conference
  - 4. Alcohol will not be reimbursed.
  - 5. When paying for more than one person, line item who the item is for or circle your items on the receipt.

**B. Travel Conferences (Northern California, Outside of CA)**

- a. Attendees will be notified in advance of the event what they may request reimbursement for. Attendees will most often be reimbursed for:
  - i. Registration costs for approved conference
  - ii. Lodging. Up to standard room rates for hotels associated with the approved conference. Taxes & Resort Fees are included. Members are responsible for any incidentals or upgrades.
    - 1. Members will be encouraged to share a room with a TVEA Member when possible. In this case, lodging will be covered for attendees.
    - 2. Members who wish to have their own room will be required to cover one night of lodging.
  - iii. Mileage. Transportation by personal automobile for round trip by nearest traveled highway at the current IRS rate per mile.
    - 1. Mileage reimbursement cannot exceed the cost of plane fare unless traveling with another TVEA member and carpooling is less than airfare for attendees.
    - 2. To and from the Airport.
    - 3. A Mileage Reimbursement form must be submitted with the Expense Reimbursement Form.
  - iv. Parking.
    - 1. Hotel self parking at daily rate.
    - 2. Airport or Long Term Parking off site at daily rate.
  - v. Airfare. Flights will be reimbursed with prior approval. This includes approval for one checked bag. Research most cost effective flight travel and contact TVEA for approval.
  - vi. Airport transportation costs will be allowed when ~~necessary~~ no other form of transportation is available. at actual costs. This includes rideshare.
  - vii. Portage/Tipping. Max \$8.00/day
  - viii. Meals will be reimbursed at the actual amount paid subject to the following guidelines:
    - 1. The maximum allocation for dinner shall be \$40 and daily allocation for ~~meals~~ food shall be \$85.00.

2. No reimbursement shall be provided for meals that are included as part of the events package. Ie. If brunch is served, breakfast nor lunch receipts will be reimbursed.
3. Travel day - meal allotment for food up to \$85 outside of conference meals.  
IE. Travel home from Vegas after the conference, meal may be reimbursed. Travel to and from NEA RA or Northern California, meals when traveling may be reimbursed.
4. Extra meal expenditures due to earlier or later travel ~~are not reimbursable~~: to extend a trip are not reimbursable.

**C. CTA State Council Meetings**

- a. Representatives may submit a reimbursement request for one night overnight stay for each of the quarterly CTA State Council Meetings.
- b. Requests for reimbursement must be submitted on the Expense Reimbursement Form with the required receipt for lodging.
- c. TVEA will cover one release day the Friday before each State Council Weekend meeting, for a total of 4 release days per year, per delegate.

**D. NEA RA**

- a. Representatives who are elected as the TVEA Local NEA RA Delegate will receive the same amount of funding as CTA funds the State Delegates.
- b. The Travel Conferences guidelines for reimbursement will be used for NEA RA Local Delegates.
- c. CTA/NEA Representative Assembly State Delegates are eligible for conference fee reimbursement for 50% of the hotel room cost as CTA reimburses the other 50%.

**Receipts**

- A. All requests for reimbursement must be submitted on the Expense Reimbursement Form with the required receipts for registration, meals, transportation, and other costs. If required information or receipts are missing, the expense statement will be returned to the originator. Members will only be reimbursed with detailed receipts, not credit card receipts.
  - a. Registration receipt shall come from the Conference via email or print out from registration.
  - b. Lodging receipts must come from the hotel with details of stay. Reservation receipts cannot be used. Contact the hotel if you do not receive your itemized receipt upon checkout.
  - c. Meal receipts must include details and final payment amount.
    - i. Alcohol will not be reimbursed.
    - ii. When paying for more than one person, notate on the receipt who the item is for or circle your items on the receipt.
    - iii. Reimbursement will cover up to the max amount of meal or daily allotment.
  - d. Hotel Parking Receipts may be on the hotel bill or separate from the parking attendant.
  - e. Airport Parking or Long Term Parking receipts are required for reimbursement.
  - f. Airfare receipt may come from email confirmation.
  - g. Transportation/Rideshare receipts may come from email receipt or snapshot image of Phone App.
- B. Expenses not reimbursable include but are not limited to:

- a. Parties and gifts
- b. In-flight movies
- c. Hotel room movies
- d. Personal telephone calls
- e. Extra luggage costs

### **Reimbursement Timeframe**

- C. No cash advances will be given.
- D. Any exceptions or variations from the above rules covering travel expense reimbursements shall be allowed only with approval of the Executive Board.
- E. Reimbursements must be requested within 30 days, 45 days for NEA RA, of an event.
- F. The Executive Board must authorize any reimbursement claims after 30 days or any variation to the above conditions. A member must request this in writing for it to be considered.
- G. Payment by TVEA for a substitute teacher to work in a member's place in order to attend a meeting or conference must be approved by the President before the event.

### **Responsibilities of Attendee**

- A. Individuals will be asked to send a brief summary of their experience at the event upon return from the conference/meeting. This may be used in TVEA Communications with membership.  
<https://forms.gle/XDQJ9yyeooYmsqmY9>
- B. Attendees are a representative of TVEA and its membership. Professional conduct is expected at ALL times while at the event. Intoxication and drug use is not acceptable at any event.
- C. No personal agendas including private business promotion, shall be conducted at any event.
- D. Attendees are responsible for notifying TVEA if they cannot attend an event they are registered for as quickly as possible. This allows another member to benefit from the potential opportunity to attend.
- E. Attendee is responsible for covering any costs that are incurred if family members are brought to the event.