



CONFERENCE, TRAINING AND ACTIVITY GUIDELINES

(Covering Board Policy BP 7400 and Administrative Procedure AP 7400)

Effective July 1, 2025

Overview

District employees may be authorized to attend and/or facilitate seminars, conferences, classes, and other activities to enhance their job knowledge. Certain expenses related to these activities may be paid by the District. Prior to attending such events, employees are required to complete a ***Request for Conference or Activity Attendance*** form to receive travel / attendance authorization, even if there is no reimbursable expense. The *Request for Conference or Activity Attendance* form should include information on the type of activity, dates, place, and an estimate of expenses, and it should be completed well in advance of the scheduled activity (**at least 30 days** is recommended). Once the activity has been approved by the department head and the College President, the request is then sent to the College Financial Administrator (CFA) or other administrative personnel for fund encumbrance and a reference number. Funds for conferences and other training-related activities must be encumbered under **GL 586100** for the maximum amount of funds authorized by the approving official at the college.

Types of Activities

The following types of activities are covered by this guidelines document and should be processed on the *Request for Conference or Activity Attendance* form. Note that employees may qualify whether attending or facilitating training activities.

- Conferences
- Training classes
- Workshops, seminars, webinars
- Field trips
- Compliance training
- Trade certification courses (plumbing, pesticides, etc.)

The following activities are **NOT** processed under the Conference guidelines:

- MOUS Training (must go through Human Resources)
- Classes for college credit (follow Tuition Reimbursement rules)
- Courses or training to obtain a personal certification or designation (ie: CPA license, BAR license, nursing license)
- Student-related activities (follow Student Travel guidelines)
- Self-Study programs (consisting of study materials and/or exam fees)

- Any type of training paid out-of-pocket that was not pre-authorized (may require Board approval to qualify for reimbursement)

Processing Timeline

Conference and training requests must be initiated at least 30 days in advance to allow for all necessary approvals and fund encumbrance to be posted.

Advance registration fee payment and reimbursement requests will be processed by the Accounts Payable Office (AP) within 10 business days of receipt.

Reimbursement requests should be submitted to your local business/fiscal office no later than 30 days after the completion of the conference or activity. The request for reimbursement should include evidence of payment (receipts or bank/Credit card statements). Reimbursement may be disallowed in the absence of evidence of payment. Please keep your receipts. Late submissions may require additional college and/or District approval. Also, late submissions may not be processed within the 10-business day timeline.

Please direct all questions to your location's business/fiscal office. The ESC AP office will work with your local business/fiscal office staff to resolve all issues.

Receipts

Submitted receipts must show evidence of payment by cash, card or other forms of payment. This is usually noted at the bottom of receipts. Please note that a receipt is different from billing invoice. In the absence of receipts, the employee may be asked to provide some other evidence of payment which may include a bank or credit card statement.

Payment Processing Options

All conference/training activities payment requests should be accompanied by an approved "*Request for Conference or Activity Attendance*" form. The following are the guidelines for payments:

1. ***Conference Registration Fees:*** The recommended procedure for payment of qualifying conference registration fees is to request the ESC AP office to process and send an advance payment directly to the vendor. Please indicate on the *Request for Conference* form if an advance payment is requested, and include relevant documents (invoice, conference or billing document) to support the payment request. The vendor's name and remittance address should be stated on the vendor invoice or other documents submitted. Prepayments will only be made up to 30 days in advance of the activity or event, unless an earlier payment is necessary to take advantage of "early bird" rates. Please note that in order for AP to prepay registration fees, the conference agency must be an established vendor in SAP.

Payment Option 2 is for an employee to pay out-of-pocket for registration fees or course fees, however, reimbursement will be contingent upon four things:

- A. The activity must be approved in advance. If it is not, then Board approval will be required for reimbursement.
- B. The activity must qualify for reimbursement under the *Conference and Activity Attendance* rules.
- C. The event must be concluded and valid confirmation or evidence (such as proof of payment) is provided to indicate the employee did in fact attend the activity.
- D. Proof of payment for all out-of-pocket expenses (proof may include original invoices and receipts indicating payment with cash, the employee's credit card, a front and back copy of the employee's cashed check, copy of the employee's bank statement or credit card statement showing the payment being made).

Cal Card holders can use their card to make payment on their conference registration fees.

2. **Transportation:** Employees may arrange their own flights, train, bus or book one through a District approved vendor.

Option 1: You can go through one of the District's approved travel agencies (see below). The agency may assist you with booking transportation once you provide them your district assigned Travel Number.

Option 2: Use a Cal Card to pay for the flight, train or bus.

Option 3: Pay "out-of-pocket" and request a reimbursement on the Travel Expense Claim form after the trip is over. Reimbursement will be contingent upon the activity having been approved in advance and confirmation that the employee attended the activity.

Note that upgraded seating is not allowed. Economy class must be utilized, unless a preapproval is granted for extenuating circumstances. In the absence of a receipt or document showing economy class purchase or a pre-approval from deviating from the policy, the AP office will reimburse up to an amount determined by AP staff to be reasonable for the particular trip.

3. **Lodging:** Employees may arrange their own lodging. The reservation must be in the name of the travelling employee. As with flight, there are several options.

Option 1: Use a Cal Card to pay for the lodging.

Option 2: Request a travel advance for the anticipated cost of the lodging. Please provide documentation of your estimated costs – reservation confirmation, hotel quotes, etc. are examples. A ten-business day lead time is required to process an advance check to the employee. Note that advance payments are not issued more than one week ahead of the event or activity.

Option 3: Pay "out-of-pocket" and request a reimbursement on the Travel Expense Claim form after the trip is over.

Please note the following:

- Upgrades like presidential suites, room service and other luxuries are disallowed
- If available, the employee should utilize conference provided hotels which usually have a reasonable rate.
- **If the conference does not provide block hotel room rates, the employee must exercise due diligence in sourcing reasonable hotel accommodation. The employee should document this diligence by providing available and comparable hotel rates at the time of booking. Please consider proximity to the conference venue when documenting available and comparable rates.**
- If the employee does not utilize conference hotels, and in the absence of comparable room rates as provided by employee, the AP staff shall pay up to 125% of conference rates (a reasonable rate will be determined by AP staff if conference rate cannot be determined).
- Please follow the table below for allowable hotel lodging:

Days of Conference/Training	*Within 20 to 50 miles from employee's residence	50 miles or more from employee's residence
1 - Day	Disallowed	1 hotel night allowed
2 - Day	1 hotel night– must be pre-approved and include a business case memo	2 hotel night allowed
3 - Day	2 hotel night - must be pre-approved and include a business case memo	3 hotel night allowed
4 - Day	3 hotel night - must be pre-approved and include a business case memo	4 hotel night allowed
<p>* Employees will not be eligible for reimbursement for hotel costs if the conference or activity location is within 20 miles of employee's residence. Employee's residence is the address on file with the District as posted in HR systems. When a business case memo is required, the memo should be dated and signed by Department Manager (or Dean, Director, VP) and included in the request for conference package for pre-approval. Any approval after the fact may not be considered for reimbursement.</p>		

4. ***Meal Expenses:*** Reimbursements are allowed for meal expenses at all-day and overnight activities and events. The meal reimbursement is capped at \$75.00 (including gratuities and taxes) per day when detailed itemized receipts are provided. The District will reimburse \$35.00 per diem (including gratuities and taxes) – no receipts are required. If an itemized meal receipts show more than one guest, AP staff may limit the reimbursement amount to the per diem rate.

Food expenses incurred after a scheduled event has ended are disallowed. Meal tips and gratuities are limited to **20%** (or maximum allowed by prevailing Board Rule) of the total cost of the meal, before applicable taxes.

There are several payment options for meals:

Option 1: Use the Cal Card to pay for meals of cardholder and other District employees while traveling. The other employees cannot claim the same meals expended on the Cal Card.

Option 2: Request an advance check at least ten days prior to the event.

Option 3: Pay "out-of-pocket" for food expenses and request reimbursement on the Travel Expense Claim form upon return from the event or activity.

5. ***Mileage Expenses:*** The use of a private vehicle is allowed for attending conferences and training activities. When using private vehicle, the employee must be properly licensed to drive within the United States, and the vehicle must carry the minimum liability insurance required by California law. Mileage driven for any event or activity processed on a *Request for Conference or Activity Attendance* form must be claimed on an accompanying Travel Expense Claim form, **not** on the standard Mileage Claim form.

An employee's normal commute miles should be deducted from training/travel mileage when traveling on a business day. "Normal commute miles" is defined as the distance between employee's residence and assigned work location (**this is also applicable to employees working partial or full remote schedules**). Full mileage may be claimed for parts of travel on weekends. Proper backup documentation for vehicle expenses must include trip logs, Google/Yahoo (of other) Map mileage estimates, parking stubs, etc. Note that the expenses claimed for the use of a personal vehicle cannot exceed the cost of the most economical carrier such as an airline flight, rail or bus transportation. If multiple employees carpool to an event, it is possible that the mileage expense claim, although greater than the cost of a round-trip flight for one person, could be the most economical transportation. Only the owner of the carpool vehicle may claim the mileage allowance in such situation.

6. **Rental Cars:** The use of a rental vehicle is allowed on approved travels. Before renting a vehicle, employees should consider the availability of taxis/buses/uber or other like transports which may offer an economical rate compared to rental costs. If employee chooses to rent a vehicle, providing comparable rates will expedite reimbursement. AP staff may consider these available options when presented with a reimbursement claim for rental costs. The distance from airports and hotels to conference venues will be taken into consideration. **Please note that travels other than to and from conference event locations, hotels, airports and employee homes/office will not be reimbursed by the District.**

The employee must be named on the rental contract as the driver. The employee **MUST** include basic liability (also known as Damage Waiver) and Supplemental Liability insurance coverage. Employees must opt for standard rental vehicles. The rental of luxury or non-standard vehicles is not allowed. AP staff will use reasonable efforts to determine standard rates if an employee's claim involves non-standard rental.

Here are some further considerations when planning a conference or training activity:

Advance Checks can be made payable to an employee for anticipated travel expenses. This is provided towards lodging, meals, and other incidental expenses. Incidental expenses are limited to \$20.00 per day on travel days, and \$5.00 per day on non-travel days.

A 10 day lead time is required for processing advances. A travel advance must be requested on the *Conference Travel Advance Request* form. Travel advances may be issued to employees no more than one week in advance of the event. If it is necessary to reserve lodging more than one week in advance of the event, then it is recommended that the employee reserve/hold the room night(s) with a Cal Card or personal credit card. Advance checks must be a minimum of \$100 and they may only be issued for up to 90% of the total estimated expenses allowed. Anticipated expenses must be justifiable and backup documentation may be requested.

Within 30 days upon return from the training/conference event, the employee must file a Travel Expense Claim listing the actual expenses incurred. If the advance check is larger than the valid expenses incurred, the employee must write a check to the District made payable to: *LACCD*, for the amount of the difference. If the expenses incurred are greater than 110% of the encumbered amount, the employee may file an amendment to the travel request to request an increase in the approved funds. The amendment must be substantiated by original itemized receipts and must be approved by the VP of Administrative Services or the President of the college.

Note: Un-cleared travel advances will result in a hold on the processing of future advances for both conferences, student-travel activities, as well as other reimbursements.

The AP office may request for additional explanation and/or VP of Administrative Services approval for any reimbursement claim that is submitted more than 30 days after the conclusion of the conference.

Payments Made Out-of-Pocket: An employee may pay out-of-pocket for training or conference-related expenses and then request for reimbursement, but only on the condition that attendance authorization was received prior to the activity or event. Reimbursement amounts cannot exceed the pre-approved amount unless an amendment is filed and approved. Note that if an employee pays conference fees out-of-pocket for an upcoming conference or training event, the employee will NOT be eligible for reimbursement until after the event is over and it is confirmed that the employee attended the activity. Reimbursement claims must be filed on the *Conference Travel Expense Claim* form. Any reimbursement received by an employee from sources other than the District shall be deducted.

Employees working for Multiple Locations or with Multiple Assignments: An employee may not claim more than one travel expense claim for the same conference. Multiple locations or departments may provide the employee with an approved budget for the same conference, however, all expenses claimed by the employee may only be claimed once and are subject to applicable expense limitations. The employee may submit only one expense claim (which may be approved by one or more location approvers).

Students and Student Workers who attend conferences: Any conferences or training activities involving students must be processed using the Student Travel Guidelines, not the Conference guidelines, except in the case of student-workers who have an employee ID number and are travelling for a work-related activity.

Charter Vans and Buses: Payments for charter vans and buses must be made directly to the vendor on a Short-Term Agreement (STA) if under \$5,000 (or contract if \$5,000 or more).

Tour Companies: If a tour company is retained to facilitate travel arrangements for a group of individuals and the travel expenses are being paid to the tour company (as opposed to a direct payment to the airline, venue, or charter van service) then a contract must be created with that tour company and the payment will be made according to the district's contract guidelines.

One Conference Request form per person: Employees may only process their own expenses on a *Request for Conference or Activity Attendance* form or *Conference Travel Expense Claim*. They may not pay for someone else's expenses and then request reimbursement on their personal claim.

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Payments for events occurring after current fiscal year ends: District prepayments for registration fees and course fees are typically only made up to 30 days in advance of the activity or event. It is possible to process a prepayment in the current year for an event taking place in the next fiscal year by using the pre-pay account. Please submit your request as normal. College fiscal office staff and ESC AP staff will review and process accordingly.

Disallowed Expenses: Certain expense reimbursements are not allowed by the District. These include upgraded airline seating, deluxe lodging accommodations, non-standard or luxury rental vehicles, alcohol, tobacco, firearms and items of a personal nature. **Expenses of spouses, friends, and relatives traveling with the employee are also disallowed.** Employees are encouraged to check with their college business office if there are any concerns or questions about allowable and unallowable expenses, as this list is not exhaustive.

Cal Card Rules for Conferences / Training Activities

The Cal Card may be used to make travel purchases and arrangements subject to the normal limitations of the card. The card holders may arrange travel for themselves and their direct report staff only. Cal Card may not be used for covering the expenses of a superior. Qualifying purchases include conference fees (do not include activities classified under tuition reimbursement or unapproved conferences), airfare, lodging, and food expenses. Cal Card cannot be used to pay organizational membership fees.

Please consult the Cal Card Guidelines for the complete policy on the use of Cal Cards.

Exception Handling

Any known exceptions or deviations from the guidelines should be reviewed and approved by the Vice President of Administrative Services or President of the college **PRIOR** to the conference

attendance. Evidence of such approval include an email communication or signed memo that details the nature of the exception, dated prior to the occurrence of the event. **Travel Expense claims that deviate from policy must be thoroughly reviewed by the College Business Office and all deviations must be individually noted and supported with a written explanation. A detailed memo must be sent to the VC/CFO from the College President. These requests are not guaranteed to be approved.**