

Administrative Procedure

A.P. 5 - 5



Date: March 21, 2006

Reviewed: April 24, 2007

Subject: Conferences, Workshops and Seminars

Purpose

This guideline is intended to provide an approval and reimbursement process for trustees and employees of the Board attending conferences, workshops and seminars.

Approval Process

1. A **Request for Financial Assistance to Attend** must be completed and submitted to the appropriate supervisor along with all registration material. The **Request for Financial Assistance to Attend** is available in FileMaker and should be completed using a computer to ensure accuracy and legibility.
2. Authorization to attend meetings, conferences, conventions and seminars shall be as follows:
 - Trustees / Director of Education - Chairperson/Vice-Chairperson of the Board
 - Business Officials - Superintendent of Business
 - Human Resources Officials - Superintendent of Human Resources
 - Board Office Academic Staff - Superintendent of Education
 - School Staff - School Principal
 - Senior Administrative Staff - Director of Education
 - Chairperson - Vice-chair
 - Vice-chair - Chairperson
3. The authorized form and registration materials are then forwarded to the Accounting and Assessment Officer at the Catholic Education Centre who will:
 - register the applicant for the conference, workshop or seminar.
 - forward a cheque for registration directly to the conference, workshop or seminarThe authorization form and registration materials must be received by the Accounting and Assessment Officer at least two weeks prior to the registration deadline.
Upon receiving approval, employees may register using their purchase card.
4. The registrant will receive a copy of the authorized Request; this will serve as confirmation that the registration has been forwarded and paid. The registrant is responsible for:
 - making their own accommodation arrangements.
 - completing an **Expense Account Claim** (in FileMaker) and returning it to the Accounting and Assessment Officer within seven (7) working days of the return date from the conference, workshop or seminar.
 - completing a **Report and Evaluation Form** (in FileMaker) and returning it to the appropriate Supervisor within seven working (7) days of the return date from the conference, workshop or seminar.

Reimbursement Process

1. Recognized Expenses:

Travel

- First class rail and/or economy flight expenses will be paid if supported by receipts.
- Travel by car will be paid at the current board rate.
- Whenever possible, individuals shall be required to share transportation arrangements in order to minimize additional costs to the Board.
- Taxi, bus, parking expenses will be reimbursed for actual cost.
- Where a variety of travel options are available, the Board will reimburse individuals at a rate equivalent to the most reasonable and economical means of travel.

Registration Fees will be paid by the Board.

Meals, tips and gratuities will be reimbursed according to actual receipts issued. A credit card receipt is not sufficient. Receipts for meals for more than the claiming individual shall be accompanied by the names of those in attendance and the purpose of the meeting. Alcohol is not a reimbursable expense.

Accommodation - the expenses for accommodation will be reimbursed only if supported by receipts. Typical reimbursable accommodation will be “standard” single or double rooms.

2. The employee/trustee is to complete the **Expense Account Claim** (in FileMaker) within seven (7) working days of the return date from the conference, workshop or seminar.
3. Approval of the payment of expense accounts shall be made by the person who authorized attendance at the conference, workshop or seminar. Approval of the expense accounts of the Director of Education shall be made by the Chairperson or Vice-chair of the Board.
4. The employee/trustee is to complete the **Report and Evaluation Form** (in FileMaker) and return it to the appropriate Supervisor within seven (7) working days of the return date from the conference, workshop or seminar.

[See Conference Forms in First Class / Conferences / Forms / Administrative](#)