



# **MILWAUKEE PUBLIC SCHOOLS**

## **Travel Guidelines and Procedures Manual**



**Dr. Keith P. Posley**  
Superintendent

**Martha Kreitzman**  
Chief Financial Officer

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# Contents

- Pre-approval Considerations..... 3
  - I. Eligible Personnel ..... 4
  - II. Non-Eligible Personnel ..... 4
  - III. Eligible Travel ..... 4
  - IV. Funding for Travel ..... 4
  - V. Expenses for Travel inside Milwaukee County..... 5
  - VI. Expenses for Travel outside Milwaukee County ..... 5
    - A. Transportation by Common Carrier..... 5
    - B. Transportation by Privately Owned Vehicles ..... 6
    - C. Reimbursements..... 6
    - D. Car Rental/Taxis ..... 6
    - E. Lodging..... 7
    - F. Meals..... 7
  - VII. Travel Expenses of Other (Non-Employees) ..... 8
  - VIII. Travel Authorizations and Authorization Forms ..... 8
    - A. Authorization of Travel for Schools ..... 9
    - B. Authorization of Travel for Charter Schools ..... 9
    - C. Authorization of Travel for Offices ..... 9
    - D. Authorization of Virtual Professional Development..... 9
  - IX. Trip Reporting in IFAS..... 9
  - X. General Information..... 10
    - A. Advances..... 10
    - B. Honorariums ..... 10
    - C. Responsibility..... 10
  - XI. Travel Protocol – Internal Best Practice..... 11
  - XII. Exhibit 1 – Travel Procedure ..... 11
  - XIII. Exhibit 2 – Travel Checklist..... 13
  - XIV. Exhibit 3 – Request for Professional Leave and Travel - Schools ..... 14
  - XV. Exhibit 4 – Request for Professional Leave and Travel – Central Services ..... 16

# Overview of Travel Guidelines and Procedures

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Travel is a normal course of business. The purpose of these guidelines is to establish standards and procedures in order to reduce travel costs while complying with Federal regulations regarding reimbursement for business expense. The guidelines are designed to ensure consistency and fair treatment for members of the MPS community whose travel will be reimbursed or paid for by the District and for visitors (speakers, candidates) whose travel is at District expense. These procedures apply to all travel regardless of the source of the funds and assist in:

- Identifying reimbursable versus non-reimbursable expenditures.
- Clarifying responsibility for controlling and reporting travel costs.
- Identifying required documentation.

Travel expenses incurred while on MPS business will be paid for by the District if the expenses are reasonable, properly approved and documented. This statement covers reimbursement for transportation, auto mileage, auto rentals, hotel lodging, meals, gratuities, tolls and parking, telephone calls, and other miscellaneous expenses. The guidelines further detail the documentation required, as well as describing travel advance procedures and the authorizations needed for reimbursement.

*Note:* If travel expenses are to be charged to a grant or contract sponsored by an outside agency, the requirements of the outside agency will prevail if they are more restrictive than the District's travel guidelines. In general, travelers should make necessary travel arrangements (air travel, ground travel, accommodations). Air Travel must be arranged through the District's designated travel agency.

## Pre-approval Considerations

In all cases, requests for subsidized travel, as well as requests for virtual staff development, require substantial justification, **prior** notification, approval and documentation that will withstand any subsequent audit. All requests for reimbursement of travel expenses shall be reasonable, customary and ordinary for the type of trip taken. The greatest possible economy shall be obtained by the avoidance of unnecessary travel and joint travel by authorized travelers in a single vehicle whenever possible.



## **I. Eligible Personnel**

The following classifications of personnel shall be eligible for reimbursement for travel expenses:

- A. Board Members.
- B. MPS Employees.
- C. Authorized designees, such as parents.
- D. Authorized candidates for MPS employment required to travel to an MPS location as part of the recruiting and hiring processes. Note: Reimbursement in this situation should be processed through an Electronic Direct Payment (EDP).

## **II. Non-Eligible Personnel**

The following classifications of personnel are not eligible for reimbursement for travel expenses:

- A. Travel by non-staff members will NOT be approved, except for travel related to District programs such as Title I.
- B. Consultants or contractors traveling on MPS business are expected to include the cost of their travel in their contract as part of the fixed fee.

## **III. Eligible Travel**

Travel expenses will be approved for the following kinds of travel:

- A. Travel necessary for training required for staff in schools.
- B. Travel for training mandated by the state or federal government or program funders.
- C. Travel for training related to areas of responsibility.
- D. Travel to support the District's legislative agenda and lobbying efforts.
- E. Travel to represent the District at state or national association meetings or conferences.

## **IV. Funding for Travel**

Travel expenses can be paid for by the following funds:

- A. Categorical (grant) funded travel will be allowable ONLY if a travel budget is approved by the grantor.
- B. Travel funded through trust accounts will be allowable ONLY if it is directly related to the purpose of the trust.
- C. School Operations funded (Board funded) travel will only be allowed when necessary or required for the educational or business operations or programs of the District and the supervisor(s)

approving the form is ensuring that the travel being approved is necessary or required for the educational programs or business operations of the District.

## **V. Expenses for Travel inside Milwaukee County**

All employees and authorized individuals whose official duties for the District require them to travel from their official headquarters to other locations in Milwaukee County shall be reimbursed for travel in their privately owned vehicle at the published Internal Revenue Service (IRS) standard mileage rate for business. [\*IRS Mileage Reimbursement Rates\*](#) (Mileage Reimbursement for travel in Milwaukee County is processed by Payroll using a Car Allowance Timesheet and NOT an IFAS Travel Record.) Necessary parking fees while on business travel inside Milwaukee County are reimbursable when other non-fee-based parking options are not available. Taxi charges are non-reimbursable for business travel inside Milwaukee County.

## **VI. Expenses for Travel outside Milwaukee County**

The most effective and efficient means of transportation should be used for travel outside Milwaukee County. All requests for reimbursement of travel expenses must be reasonable, customary and ordinary for the type of trip taken. The greatest possible economy shall be obtained by the avoidance of unnecessary travel and joint travel by authorized travelers in a single vehicle whenever feasible.

### **A. Transportation by Common Carrier**

It is expected that most individuals will use common carriers (airline, railroad or bus) for trips greater than 100 miles. Travel arrangements will be made by the employee directly, or with the assistance of the department or school's designated travel coordinator. Reimbursement will be provided in the amount of coach fare. Airport, rail or bus station parking for up to five (5) days is reimbursable.

When using commercial air travel, consider the following cost saving strategies:

- Travel with Carry-On Only
- Consult airline website for baggage fees before traveling
  - Reimbursement of baggage fees is allowed for the first checked bag
  - Excess baggage charges (overweight and second/subsequent checked bags) are only allowable when the District determines the baggage was needed for official business reasons
- Be flexible in selection of airlines and flight time

## B. Transportation by Privately Owned Vehicles

Individuals using their automobiles for out of county business shall be reimbursed at the mileage rate allowable by the IRS (see [\*IRS Mileage Reimbursement Rates\*](#) ) at the time of travel, using the most direct route between the work station, destination, and return as determined by the state highway department maps. In no event shall the total reimbursed cost exceed the equivalent cost of one round trip coach airfare purchased at least thirty (30) days prior to the date of travel commenced.

## C. Reimbursements

Reimbursements are set as per [\*IRS Guidelines\*](#). Reimbursements for per diem and lodging shall not exceed what would have been required if the most practical common carrier had been used. Travel time in excess of that by common carrier shall be charged to personal vacation.

Parking fees and tolls are reimbursable, provided proper receipts are submitted.

In addition to meals, the per diem covers the cost of incidental expenses such as laundry, cleaning and gratuities to airport and hotel personnel.

Individuals attending the same event shall travel together in as few automobiles as possible.

## D. Car Rental/Taxis

The car rental must be an economy-sized vehicle. If other than an economy-sized vehicle is needed, detailed written justification as to why a different sized rental car is being requested must be submitted.

The employee's supervisor should consider the following guidelines before approving the use of a rental car:

1. A rental car is more cost-effective than other means of ground transportation.
2. The amount of materials/equipment transported precludes use of other ground transportation.
3. No other transportation is reasonably available at the time(s)/location(s) required.
4. Car rentals at the destination should be avoided and should only occur if absolutely necessary. In many cases, hotel and other shuttle services provide free or economical transportation from the airport, train, or bus station.
5. Use of a rental car must be identified when the [\*Request for Professional Leave and Travel-Schools\*](#) form or [\*Request for Professional Leave and Travel-Central Services\*](#) is

submitted and its use must be approved. Costs of a rental car at the destination, when adequately documented, are reimbursable. Collision Damage Waiver (Physical Damage Coverage), Liability Coverage, Personal Accident Insurance (death and dismemberment), often offered by car rental companies, are not reimbursable.

6. Charges for taxis and air limousines (including a reasonable tip) and shuttle service costs are reimbursable. An explanation should accompany any claim in excess of \$25.00 per taxi trip.

#### E. Lodging

1. Individuals should seek accommodations that are in line with the average cost of a single room rate in the community at the motel or hotel where the meeting is held. Lodging expenses must be supported by an itemized hotel bill. Charges for late departures will not be reimbursed. **\*NOTE: Airbnb and house rentals are not allowable.**
2. Lodging will not be authorized for single-day conferences unless the distance to the conference location exceeds 100 miles. Lodging will be limited to the night immediately preceding the conference.

#### F. Meals

1. The per diem is intended to cover the costs of meals, including taxes and tips.
2. If meals are included in the cost of the event registration fee, the per diem rate will be reduced accordingly: 15% for breakfast, 35% for lunch, and 50% of the per diem rate for dinner.
3. A traveler's total per diem will be calculated by the IFAS system. Travelers with departure times before 12:00 noon on the day of departure will receive the full allowable per diem.
4. Travelers with departure times after 12:00 noon will receive one-half the allowable per diem.
5. Travelers with arrival times before 12:00 noon on the return date will receive one-half the allowable per diem.
6. Travelers with arrival times after 12:00 noon on the return date will receive the full allowable per diem.
7. There will be no per diem for 1-day trips.

#### G. Miscellaneous Expenses

1. Never assume that an item will be covered under the "Miscellaneous" category. Be sure to check with your supervisor if an item you need is not outlined specifically in the guidelines and procedures manual.
2. Expenses that do not fit into any of the previous categories, yet are directly business related, must be reasonable and necessary for the business purpose of the trip.

3. The following expenses are not reimbursable:
- Avoidable “No-Show” charges for hotel or car service
  - Additional charges for late checkout
  - Cancellation charges (unless fully justified)
  - Flight insurance
  - Non-compulsory insurance coverage
  - Rental car upgrades
  - Loss/theft of personal funds or property/lost baggage
  - Traffic citations, parking tickets and other fines
  - Towing service, repairs due to accidents, etc. for personal vehicle
  - Personal items (e.g., toiletries, luggage, clothing, etc.)
  - Pay-Per-View movies in hotel/motel room; personal entertainment
  - Spouse or family members’ travel costs
  - Expenses related to vacation or personal days while on a business trip
  - Childcare costs and kennel costs
  - Delinquency fees/finance charges for personal credit cards
  - Alcoholic Beverages

## VII. Travel Expenses of Other (Non-Employees)

A single [\*Travel Record\*](#) in the IFAS system should apply to one person. If a non-employee (such as a parent) will be attending a conference, the non-employee’s trip information must be included in IFAS under an employee’s name. The name of the non-employee and his/her status (parent, etc.) should be indicated in the description of the [\*Travel Record\*](#) in IFAS.

Spousal travel is permitted, but expenses are **NOT** reimbursable. The lodging clerk should be asked to write the single-room rate on the receipt.

## VIII. Travel Authorizations and Authorization Forms

All travel must be supported by completed and approved [\*Request for Professional Leave and Travel-Central Services\*](#) form or a [\*Request for Professional Leave and Travel-Schools\*](#) (See Exhibits 1 and 2). These approvals for schools and departments **MUST OCCUR BEFORE** any IFAS entry or financial commitment is undertaken by the school or Central Services office. Forms are to be completed, approved, and returned to the originator at least forty-five (45) days before the travel dates.

Travel must be approved prior to the trip unless impractical due to timing and urgency of trip. As required by [\*Board procedures\*](#), the Board President shall approve travel of Board members. All travel needs to be appropriately approved and signed by the Superintendent’s Office if the trip is outside of Wisconsin.



Trips for a school or office may be declined if that school or department has any trips that have not been reconciled in IFAS. All trips must be reconciled within fifteen (15) days of the completion of the trip.

#### **A. Authorization of Travel for Schools**

Travel for all school employees and parents must have prior approval from the building administrator and the Regional Superintendent assigned to their school. All travel needs to be appropriately approved and signed by all of the aforementioned, as well as the Deputy Superintendent if the trip is outside of Wisconsin. This requirement applies regardless of the cost or funding source of the trip. Included with the form must be written rationale of how the travel relates to the day-to-day work of the employee, and how the employee will utilize and disseminate what he/she has learned.

#### **B. Authorization of Travel for Charter Schools**

The MPS Travel Policies and Procedures apply to Instrumentality Charter Schools, but not to Non-Instrumentality Charter Schools. Non-instrumentality Charter Schools will follow their own authorization guidelines and procedures.

#### **C. Authorization of Travel for Offices**

Travel for Central Services staff must be approved by the appropriate Chief of the Office. Central Service employees seeking to travel must obtain their Chief's signed approval, on a [\*Request for Professional Leave and Travel-Central Services\*](#) form. The Superintendent's approval is mandatory for all Directors, Chiefs, Deputy Superintendents and Regional Superintendents out of state travel. Included with the form must be written rationale of how the travel relates to the day-to-day work of the employee, and how the employee will utilize and disseminate what he/she has learned.

#### **D. Authorization of Virtual Professional Development**

All virtual staff development and conferences must be supported by a complete and approved Request for Professional Leave and Travel form (see A and C above for appropriate approvers). These approvals for schools and departments **MUST OCCUR BEFORE** any IFAS entry or financial commitment is undertaken by the school or Central Services office. Forms are to be completed, approved, and returned to the originator at least forty-five (45) days before the travel dates.

### **IX. Trip Reporting in IFAS**

Trips are to be entered into the IFAS system only after proper approval for the trip has been granted by the Regional Superintendent, appropriate Chief or Superintendent as needed. Please see the [\*IFAS Dashboard "Travel"\*](#) tab for step-by-step instructions.



Schools must NEVER use their school checking account to make any payments related to employee travel. All expenditures for employee travel are processed through the IFAS system.

The agenda for the conference must be included when submitting the Request for Professional Leave and Travel form and when submitting the IFAS trip reconciliation so that the approving authority and the Finance staff can determine whether meals were served at the conference and authorize the per diem accordingly. Failure to submit agendas with the Request for Professional Leave and Travel form may result in the denial of per diem.

Absolutely **NO** reimbursement will be allowed to any traveler for the cost of alcoholic beverages.

A copy of the [Request for Professional Leave and Travel-Schools](#) or [Request for Professional Leave and Travel-Central Services](#) form must be attached to all requests for vendor prepayments, employee advance payments, expense and mileage reimbursements, and all travel reconciliations submitted to the Office of Finance.

**EXCEPTION (Board Members only):** It is not necessary to create a trip record if a member of the Board of School Directors is attending a conference that requires payment for registration only.

## X. General Information

### A. Advances

If advanced payment for travel expenses is required, a check will be advanced to an individual who forwards a completed [Direct Payment](#) request, along with a copy of the approved and signed Request for Professional Leave and Travel form and an agenda for the conference, to the Office of Finance ten (10) days prior to departure. Advances will only be provided in the amount of the travelers per diem, and only if the advance is \$100.00 or greater. Reconciliation of actual expenses with the advance must be made within fifteen (15) days after the trip has been completed.

Settlement for additional funds due to MPS are to be made within fifteen (15) days after the conclusion of the trip. By accepting an advance, the traveler authorizes a payroll deduction if advanced per diem is more than the travel expenses incurred.

### B. Honorariums

All honorariums must be turned over to the District unless the employee has taken vacation. No travel expenses may be charged for any meeting for which an honorarium is received.

### C. Responsibility

The certification of all information included on the Request for Professional Leave and Travel form



and/or IFAS trip record is the responsibility of the individual and his/her supervisor.

## XI. Travel Protocol – Internal Best Practice

All [Request for Professional Leave and Travel-Schools](#) or [Request for Professional Leave and Travel-Central Services](#) forms must be completed and approved at least 45 days before the travel dates. Communication with the person traveling is a must. Please make sure you are using the correct and most updated [Request for Professional Leave & Travel form](#). This is located in the Travel tab in IFAS Forms. **Please note:** The [Request for Professional Leave & Travel form](#) is not needed for travel within Milwaukee County.

## XII. Exhibit 1 – Travel Procedure

Recommended Schedule	Information to gather in order to enter in IFAS:
<b>45 days or more prior</b>	Traveler completes an MPS <i>Request for Professional Leave and Travel</i> Form and submits the form to their supervisor/s for approval. If traveling outside of Wisconsin, the <i>Request Leave and Travel</i> Form must be signed first by the applicant →school leader or department head →Regional Superintendent→Chief of Staff→and then the Superintendent signs off last.
<b>45 days or more prior</b>	Supervisor/s review <i>Request for Professional Leave and Travel</i> Form. If request is denied the form is returned to the traveler. If approved, the signed form is sent by the supervisor to the school or department support staff person responsible for entering the trip in IFAS.
<b>30 days prior</b>	Designated school or department support staff person enters trip into IFAS by creating a <b>Travel System number</b> (TS#) in Travel tab→Data Entry→Click here to create a travel record. The TS# should be written on top of the <i>Request Leave and Travel</i> Form.
<b>30 days prior</b>	Registration – contact the conference provider for conference availability and what the registration cost covers. Request an invoice and submit a direct pay. Fill in the description field the following way: <b>Registration: Invoice#/Full Name</b>  The TS# goes in the 2 <sup>nd</sup> reference field. Attach a copy of the signed approved <i>Request for Professional Leave and Travel</i> form along with the direct pay.
<b>30 days prior</b>	Communicate with the applicant for flight arrangements and information needed before contacting Omega (Central Service and Schools). <ol style="list-style-type: none"> <li>a. Full name on license</li> <li>b. Date of Birth</li> <li>c. Home Address and contact information</li> <li>d. TS#</li> <li>e. Information needed: Time, (morning, afternoon, evening) destination and departure/return dates</li> <li>f. Budget code to be used</li> </ol>
<b>30 days prior</b>	Contact the hotel to make reservations and request a confirmation/invoice sent to you. Submit a direct pay, fill in the description field the following way: <b>Hotel: Confirmation or Invoice#/Full Name</b>  The TS# goes in the 2 <sup>nd</sup> reference field. Attach a copy of the signed approved <i>Request for Professional Leave and Travel</i> form. For online reservation same steps should be followed.

<p><b>20 days prior</b></p>	<p>Per Diem – Meals only for overnight stays. If the conference covers their meals, there should be no per diem given or if it covers only some meals a partial per diem is given (see per diem section for more details). If no meals are covered and the conference is more than 2 days, check with the “Per Diem” travel list that is located in the Travel tab in IFAS. If the per diem is over \$100.00 submit an advance for the applicant attending on a direct pay. Please communicate with the traveler that their address is updated in PeopleSoft. Conference agenda and a copy of signed approved <i>Request for Professional Leave and Travel</i> form should be submitted along with the direct pay for advance payment. Fill in the description field the following way: <b>Per Diem: Full Name</b> The TS# goes in the 2<sup>nd</sup> reference field.</p>
<p><b>20 days prior</b></p>	<p>Conduct follow up phone call to confirm payment is received for the applicant’s registration and hotel reservations after 5-7 days of date of mailing from finance. Make sure you write down the date you called and the person you spoke with.</p>
<p><b>5 days prior</b></p>	<p>Two travel folders should be made – one for your record and the second for the traveler. Each folder should contain the following:</p> <ul style="list-style-type: none"> <li>a. Copy of registration along with proof of payment and confirmation of payment received</li> <li>b. Copy of hotel registration along with proof of payment and confirmation of payment received</li> <li>c. Agenda/Schedule if possible</li> <li>d. Map of hotel</li> <li>e. Advance payment of their per diem if over \$100.00 and more than 2 days overnight</li> <li>f. Memo reminder to traveler of all documentation and receipts that should be returned to reconcile trip within the 15 days of their return (see list a-g below).</li> </ul>
<p><b>Recommended 1-3 days after return</b></p>	<p>Once traveler returns, print out the travel reconciliation report and gather all receipts needed to close out the trip for example:</p> <ul style="list-style-type: none"> <li>a. Agenda/Schedule</li> <li>b. Name Badge for proof of attendance</li> <li>c. Airline tickets/flight information</li> <li>d. Baggage claim receipts if charged</li> <li>e. Taxi receipts to and from airport</li> <li>f. Parking lot receipt if car was kept at the airport</li> <li>g. Hotel zero balance receipt</li> </ul>
<p><b>Recommended 4-6 days after return</b></p>	<p>If applicant is receiving a reimbursement this must be filled out on the reconciliation report and signed off by applicant→department head. A direct pay must be submitted along with the signed reconciliation report and a copy of the signed approved <i>Request for Professional Leave and Travel</i> form and submitted to Barb Corbine in Finance room 160.</p>



### XIII. Exhibit 2 - Travel Checklist

**Name of Applicant**

Name: \_\_\_\_\_ Event date: \_\_\_\_\_  
 Conference: \_\_\_\_\_ Location: \_\_\_\_\_

**Travel Checklist**

Professional Leave and Travel Form Approved/Denied	Date Completed:
If travel is approved, enter in IFAS Creating TS# - Write on top of Request Leave & Travel Form	Date Completed:
Registration arrangements	Date Completed:
Direct pay for registration submitted along w/copy of approved travel form	Date Completed:
Flight Arrangements: Omega (Central Service and Schools) <ul style="list-style-type: none"> <li>• Full name on license</li> <li>• Date of Birth</li> <li>• Home Address and contact information</li> <li>• TS#</li> <li>• Information needed: Time, (morning, afternoon, evening) destination and departure/return dates</li> <li>• Budget code</li> </ul>	Date Completed:
Hotel reservation	Date Completed:
Direct pay for hotel submitted along w/copy of approved travel form	Date Completed:
Per diem or mileage request – submit agenda w/copy of approved travel form	Date Completed:
Travel packets	Date Completed:

**Reconciliation Checklist**

Conference agenda/schedule	Received	Missing	Date:
Name badge for proof of attendance	Received	Missing	Date:
Hotel (zero balance) receipt at checkout	Received	Missing	Date:
Airline-flight information	Received	Missing	Date:
Baggage claim receipts if charged	Received	Missing	Date:
Taxi receipts to and from airport	Received	Missing	Date:
Parking lot receipts if car was kept at airport	Received	Missing	Date:
Any other allowable receipts that employee has paid	Received	Missing	Date:
Reconciliation report signed by employee, principal or supervisor	Received	Missing	Date:
Submit signed reconciliation report w/direct pay for reimbursement to employee and the signed approved Professional Leave and Travel Form	Received	Missing	Date:

Name of School/Office: \_\_\_\_\_

Completed by: \_\_\_\_\_ Date submitted to Finance: \_\_\_\_\_

**XIV. Exhibit 3 – Request for Professional Leave and Travel - Schools**  
**REQUEST FOR PROFESSIONAL LEAVE AND TRAVEL**

*Initiate this form at least forty-five (45) days before the event*

**Directions:**      *Type or use pen.*

Submit a completed copy of this form to the school administrator and Regional Directors of School Support for approval before any IFAS entry or financial commitment. **Attach a copy of official information about the event, including agenda and itinerary.**

Applicant: \_\_\_\_\_  
 I. D. Number \_\_\_\_\_  
 Position:    P AP APIC Teacher Parent  
 Other: \_\_\_\_\_  
 School: \_\_\_\_\_  
 Date: \_\_\_\_\_

EVENT: \_\_\_\_\_

LOCATION: \_\_\_\_\_

DATE(S) OF EVENT: \_\_\_\_\_

**Travel Dates/Times – Must be completed (required to calculate per diem)**

Departure Date: \_\_\_\_\_ Departure Time: \_\_\_\_ Return Date: .  
 \_\_\_\_\_ Return Time: \_\_\_\_\_

**1. STATE HOW THIS ACTIVITY ALIGNS TO THE SCHOOL’S IMPROVEMENT PLAN:**

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**2. HOW WILL YOU UTILIZE AND DISSEMINATE WHAT YOU LEARN FROM PARTICIPATING IN THIS PROFESSIONAL DEVELOPMENT EXPERIENCE?**

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**XV. Exhibit 4 – Request for Professional Leave and Travel – Central Services**

**REQUEST FOR PROFESSIONAL LEAVE AND TRAVEL**

*Initiate this form at least forty-five (45) days before the event*

**Directions:**      *Type or use pen.*

Submit a completed copy of this form to the Department head and appropriate Chief for approval before any IFAS entry or financial commitment. **Attach a copy of official**

**information about the event, including agenda and itinerary.**

Applicant: \_\_\_\_\_  
 I. D. Number \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Date:: \_\_\_\_\_

EVENT: \_\_\_\_\_

LOCATION: \_\_\_\_\_

DATE(S) OF EVENT: \_\_\_\_\_

**Travel Dates/Times – Must be completed (required to calculate per diem)**

Departure Date: \_\_\_\_\_      Departure Time: \_\_\_\_\_  
 Return Date: \_\_\_\_\_      Return Time: \_\_\_\_\_

**1. STATE HOW THIS ACTIVITY ALIGNS TO YOUR OFFICE’S GOALS FOR THIS FISCAL YEAR:**

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**2. HOW WILL YOU UTILIZE AND DISSEMINATE WHAT YOU LEARN FROM PARTICIPATING IN THIS PROFESSIONAL DEVELOPMENT EXPERIENCE?**

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