

Trustee Travel Procedure

Making Travel Easy: Step-by-Step Guide

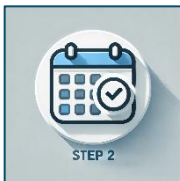
The Resource Centers strives to make travel arrangements for trustees simple and efficient. Here's an overview of the travel process and responsibilities for conferences or other board-related travel:

Step 1: Notify Our Office



- **Action:** Inform us of your intent to attend a conference or travel.
 - **How:** Send an email to Conference@ResourceCenters.com with the following details:
 - Plan Name
 - Trustee Name
 - Expected Travel Dates (Departure and Return)
 - **FPPTA Conferences and Trustee Schools**
 - Spouse or Guest
 - CPPT Registration or Course Level (Basic, Intermediate, Advanced)
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Step 2: Conference Registration



- **Our Role:** We will register you for the conference and pay the registration fee in advance.
 - **You Receive:** A confirmation email from the conference with details, including:
 - Hotel booking link
 - Contact information
 - Conference discount code for hotel rooms
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Step 3: Hotel Reservations



- **Your Responsibility:** Book your own hotel room using the provided link or information. We strongly recommend booking as soon as possible, since conference room blocks and discounted rates often fill quickly.
 - **Why:** This ensures you can secure accommodations based on your preferences and helps avoid the need to stay at an off-site hotel.
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Step 4: Travel Arrangements



- **Your Responsibility:** Make your own air travel and/or car rental reservations.
 - **Why:** This ensures flexibility with airports, travel times, and preferences.
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Step 5: Submit Expense Reimbursement Requests



- **Before Travel:**

1. Forward your hotel confirmation with total cost and travel reservations to Conference@ResourceCenters.com. Failure to provide this information timely may delay payment and cause issues when you check in or check out.
2. Submit an expense reimbursement form for mileage and per diem (meal allowances). If your Board travel policy and timing allows, advance reimbursements for meals and mileage will be issued prior to travel.
3. **Our Role:** We will prepay the hotel. We will also issue you an advance for expenses if allowed by your board travel policy.

- **After Travel:**

Submit an additional expense reimbursement request for any other out-of-pocket expenses incurred during the trip, such as resort fees, parking, tolls, or gratuities.

Centralized Travel Communication: All travel-related communication should go through our designated email:

Conference@ResourceCenters.com

Remember to include your name and the plan name in your email.

Tax Exempt Certificate: We recommend that you carry a copy of the city or plan tax exempt certificate with you for all board related travel. You can also find a copy of the tax-exempt certificate online under the trustee section of your plan webpage at www.ResourceCenters.com.

Cancellation: If a trustee changes plans or decides not to attend the conference, they are responsible for canceling their registration and hotel reservation. The plan may not receive a refund for amounts paid if the cancellation occurs close to the event, and the trustee may become responsible for some or all of the expense.

For trustees attending **FPPTA conferences**, the FPPTA will refund 100% of the conference registration fee, less a \$50 cancellation fee, for cancellations received at least 30 days prior to the event. Cancellations within 30 days will receive only a 50% refund, and cancellations within 7 days of the event will not be refunded. Hotel cancellation policies vary and should be reviewed at the time of booking.