



State of Arizona Accounting Manual

Topic 50 Travel

Issued 04/09/18

Section 40 Conferences, Conventions and Meetings

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INTRODUCTION

Conferences, conventions and meetings frequently involve travel and travel related issues such as meals and lodging and are, hence, included in the Travel Topic of SAAM.

POLICIES

1. General guidelines for conferences, conventions, training sessions and meetings.
 - 1.1. Attendance at these events should be arranged to minimize the cost of travel, meals and lodging.
 - 1.2. Participation in such events should be limited to the fewest number of State and non-State personnel needed to effectively accomplish the State's objectives.
 - 1.3. In the case of training, if a large number of personnel are to be trained, an agency should investigate whether it would be more economical and effective to bring the trainer to the students rather than sending the students to the trainer.
 - 1.4. No reimbursement shall be made for recreational or social activities that may be offered in connection with a conference.
 - 1.5. For all meetings, conferences, conventions, and training, other alternatives less costly than travel should be considered. These alternatives include, but are not limited to, webinars, audio conferences, teleconferencing, etc.
2. Non-state (which is to say, those events not hosted by the State) conferences, conventions and meetings.
 - 2.1. Lodging reimbursements related to these events may not exceed the least expensive single room rate published in the conference brochure (or other official publication of the event, such as its website or solicitation correspondence) for the conference designated lodging; this may not necessarily be the host hotel.
 - 2.1.1. At times, other rates, such as government rates, that are lower than the published conference rate, may be available. Those arranging travel related to conferences should always inquire as to the availability of lower rates.
 - 2.1.2. Frequently, accommodations at a lower cost but on a par with the hotels listed in the conference brochure are conveniently located within reasonable walking distance of the event (reasonable walking distance is generally one-half (½) mile,

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unless the participant suffers some physical handicap or must deliver bulky or heavy materials or equipment to the event site); those making arrangements should investigate such opportunities to reduce cost.

2.1.3. Non-state personnel, such as contractors, if sent to a conference in connection with State business are, if attendance and travel-related expenses will be paid by the State (no matter the funding source, e.g., a Federal or private grant or award), subject to the same limitations as apply to State employees.

2.2. Reimbursements of meal costs in excess of the regular maximum applicable individual meal rate may be allowed when all of the following are true:

2.2.1. The charge for the meal is not included in the conference fee, and

2.2.2. The meal features a speaker, formal panel discussion or other activity integral to the purpose of the conference, and

2.2.3. The activity takes place and the meal is served on the premises at which the conference is held, and

2.2.4. The cost of the meal that accompanies the presentation or activity is fifty dollars (\$50) or less.

2.2.4.1. To reimburse a cost of more than fifty dollars (\$50), the agency must communicate a request for exception to the State Comptroller. This request must provide complete details of the activity, the amount to be reimbursed and the benefit to the State derived from the claimant's attendance or participation.

3. State (which is to say, those events hosted by the State) conferences, conventions and meetings.

3.1. Agencies that sponsor conferences that include conference-designated lodging should arrange the affairs so that the conference lodging rate does not exceed the maximum lodging reimbursement rate for the conference's location.

3.2. Agencies should, if possible and practical, host events using State-owned facilities.

3.3. Agencies should generally not provide meals at the State's expense unless by so doing the State's business can be conducted more economically than would otherwise be the case.

3.3.1. Documentation must be collected and retained that clearly demonstrates and substantiates a savings for the State.

3.3.2. When the provision of meals can be justified, the cost of a meal should not exceed the regular maximum applicable individual meal rate. Every effort should be made to provide the meals as economically as possible (e.g., submarine sandwiches or pizza instead of more formal three course meals).