

## **Travel Funding Guidelines – originally introduced 6/15**

### **Updated 01/04/2018**

Extension Agents are required to develop county plans of work to prioritize and accomplish an educational mission within their county.

Out-of-county travel is often required to become educated in specific knowledge areas and to develop personal skills. Travel planned by agents should be intentional to make the best use of resources available and provide the training and development needed to conduct a county program. The agent's primary focus should be on the development of an educational program for their area of work with the needs of the county being the primary consideration.

#### **Travel Requests-**

Currently agents have 5 five sources of financial support to accomplish the development of the program and personal professional goals.

The five sources of financial support are:

County Travel

State Supported Travel Funds

County Professional Development Funds

Program Support Funds

Official Travel – No County Financial Support (travel expenses may be paid by other sources including grants and other organizations.)

**County Travel** is defined as that travel which occurs on a day to day basis. Examples include: Travel to a local event, program, collaborative meeting or home/farm visit, Homemaking leader trainings and district wide 4-H events. This travel is primarily within the county but can also be out-of-county within Kentucky to present programs, support committee meetings or attend District Staff. These funds may occasionally be used for out-of-state travel if programmatically connected and approved by the District Director.

**State Supported Travel Funds** are those funds which support statewide Extension programs and activities. Examples include: State Fair, statewide committee work or task forces, new agent orientation and core training. These are usually led by a specialist or administrator. Use of state supported travel funds is to be approved by the District Director.

**Professional Improvement Funds** are intended for travel, subsistence and registration fees for approved professional meetings and activities. Currently there is a \$3000 per year limit on these funds. An additional \$1000 can be allocated for National ESP meetings. **Starting July 1<sup>st</sup>, 2017 Professional Improvement funds can be used to pay Extension Association dues (but cannot be used for educational courses that are offered for credit (VAA is the exception).** Professional improvement funds should clearly enhance the agent's abilities to lead, facilitate or conduct programs within a county. Professional improvement opportunities outside of Kentucky and/or outside of the country should be carefully considered and limited in number (See guidelines below).

**Program Support Funds** are funds designated for program expansion and generally involve purchase of tangible materials. Program support funds should not pay for expenses normally supported by program councils such as ribbons, awards, etc. These funds should not be used to pay for expenses which benefit an individual. Program support funds should not be used for salaries, payments, bonuses, gifts or trips for individuals whether an employee, volunteer or client. Agents must develop a budget for use of program support funds and present it to the County Extension Council and District Director as part of the county budget. In addition, an annual financial report is required to be submitted to CEC and District Director.

#### **Out of State/ Country Trips – requiring overnight travel**

1. Extension Agent professional development trips should be limited to 2 out-of-state “program area” trips and the National ESP Conference per year and no more than 1 out-of-country (Out of Country professional development trips count as an out of state trip) every 3 years regardless of the source of funds, with the approval of the District Director.  
**(Any professional development trips not associated with Extension professional associations must be approved by the District Director and the Extension Director.)**
2. All overnight trips, agent retreats, trips **involving clientele** participation or professional development trips not associated with Extension organizations which are out of state /country trips must be approved by the District Director, and the Extension Director.  
Requests for the trip must include:
  - a. Clear educational objectives with easy to understand benefits to the county program.
  - b. A descriptive itinerary that clearly links to educational objectives.
  - c. Explanation of why the venue or location of the opportunity is the most desirable to meet the educational objectives.
  - d. Evidence that the outcomes and county benefits have been described and shared with county District Board members (Litmus test is: How would this look as headlines in the local paper?)
  - e. Evidence of approval of the local District Board (only for out-of-country trips)
  - f. If agent is traveling with clientele, a risk management plan must be provided.

For out-of-state/country requests, agents need to request permission using the: the myUK system, and provide additional information and justification. If traveling on State Funds provide the UK Official Travel Form.

**Out of State travel – not requiring overnight stays**

1. Out of State/ Travel with Clientele- no overnight stays
  - a. Request authorization from the District Director through myUK system.
  - b. Provide a risk management plan.
  - c. Provide clear educational objectives for the trip plus an itinerary.
  - d. Explanation of why the venue or location of the opportunity is the most desirable to meet the educational objectives.
2. Out of State travel agent only – no overnight stays
  - a. Request approval from District Director using myUK.
3. Out of State travel multiple agents only – no overnight stays (Examples: Diversity Conference when out of Kentucky, field days in neighboring states, daylong programming retreats(Nashville), etc.)
  - a. Request approval from District Director using myUK.
  - b. Provide itinerary with educational objectives for the day.
  - c. Evidence that program will provide benefit to local programs.
4. NOTE: Border county agents traveling across state lines in the scope of their normal duties are not required to request permission. (Examples would include: traveling across state lines to purchase supplies.)

**Youth – Out of County and / or Overnight Travel (02/14/2017)**

1. Any Extension event/program involving youth and travel outside the county or overnight lodging requires a risk management plan.
  - a. No travel pre-approval necessary

**Official Travel – no reimbursement from County**

Agents who wish to travel overnight Out-of-State or Out-of-Country on official travel- with no county expenses must:

1. Request authorization from District Director thru myUK – must make clear who is sponsoring trip.
2. Adhere to same guidelines as Out- of-State/ Country Trips listed above. (Including justification for professional development trips not associated with Extension professional development organizations).
3. Seek approval from Director of Extension.

**Agents serving in Leadership** roles of Professional Associations and Multistate educational projects/ programs will receive special consideration for exceptions to these rules as determined by the District Director, Program Leader and Director of Extension.

**NOTE: for those attending State or National Association Conferences:** Any Optional/ Pre-Conference Tours that offer NO education benefit to the county program are considered a PERSONAL benefit and are not eligible for reimbursement or payment from Professional Development Funds.