

Travel Funding Guidelines for Agents

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.

Reimbursements for travel, subsistence, registration fees, other expenses related to the day-to-day travel within the mission of Cooperative Extension must be requested through the Concur system according to the University of Kentucky and Cooperative Extension policies.

Travel Requests

Agents have (4) four sources of financial support to accomplish the development of the program and personal professional goals. The four sources of financial support are:

1. County Travel
2. State Supported Travel Funds
3. County Professional Development Funds
4. Official Travel – No County/State 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, Homemaker leader trainings and area 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 Area Professional Development Sessions. These funds may occasionally be used for out-of-state travel if programmatically connected and approved by the Area Extension Director (**AED**).

Local travel is defined as less than 50 miles one way from the employee's work address or the traveler's residence, whichever is greater. Barring exceptional business reasons, local travel does not qualify for an overnight stay or payment of personal meals. Exceptions may be made on a case-by-case basis by administration.

State Supported Travel Funds are those funds which support statewide Extension programs and activities.

Examples include: Kentucky State Fair, statewide committee work or task forces, new agent orientation and core trainings. These are usually led by a specialist or administrator. Use of state supported travel funds is to be approved by the AED.

County Extension budgets may include identifiable funds for **professional improvement**. Funds thus identified may be established only if all other needs of the county Extension program are met in the budgeting process (travel, rent, support staff salary and additional agent salary, etc.). Professional improvement funds may be up to but not more than \$4,000 per agent per year. Support staff or program assistants may also receive professional improvement funds (up to \$1,7500 is suggested). Additionally, counties may allocate up to \$1,000 additional Professional Improvement Funds for Agents to be used for participating in state and/or national Epsilon Sigma Phi professional meetings.

Professional Improvement Funds may be used for Extension supported Associations and Extension Supported Professional Development opportunities. All professional associations dues, and other professional improvement expenditures must be approved by the Area Extension Director. International Professional Development trips and other Professional Development opportunity requests must be approved by the Area Extension Director and final approval made by the appropriate Regional Extension Director.

Funds budgeted for one year cannot be carried over to the next year to increase the agent's total amount over the annual guideline. Funds expended must follow the current state expenses reimbursement guidelines for travel, meals, lodging, etc.

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).

Out of State – requiring overnight travel

For out-of-state requests, agents must request permission via the myUK system, and provide additional information and justification. Agents also need to complete Request for Authorization of Out-Of-State/Country Travel form and send to their Area Extension Director at least one month in advance for approval.

1. Extension Agent professional development trips should be limited to a max of two (2) trips every year regardless of the source of funds. Request approval from AED, with final approval made by the Regional Extension Director
2. All overnight trips, agent retreats, trips involving clientele participation or professional development trips not associated with Extension associations which are out of state or international must be approved by the AED, with final approval made by the Regional Extension Director.
 - a. **Supervisor approval must be obtained prior to making education trip arrangements.**
 - b. Approval from AED via email approval and using myUK.
 - c. Approval from Regional Extension Director via email approval and copied to AED
 - d. Approval Requests for the trip must include:
 - i. Clear, easy to understand educational objectives with clear benefits to the county program.
 - ii. A descriptive itinerary that clearly links to educational objectives.
 - iii. Explanation of why the venue or location of the opportunity is the most desirable to meet the educational objectives.
 - iv. 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?)
 - v. If agent is traveling with clientele, a **risk management plan** must be provided, **and receive AED approval via email.**
 - e. **Expenses for trip may not be reimburse if proper supervisory approval has not been obtained prior to travel.**

Out of State Travel – NOT requiring overnight stays

NOTE: Border-county agents traveling across state lines in the scope of their normal duties are not required to request permission. (*Example:* traveling across state lines to purchase supplies.)

1. Out of State Travel - Agent only - No Overnight Stays
 - a. Request approval from AED using myUK.
2. Out of State Travel - Multiple Agents only – No Overnight Stays
(*Examples:* Diversity Conference when out of Kentucky, Field Days in neighboring states, day-long programming retreats with agents in adjoining state, etc.)
 - a. Request approval from AED using myUK.
 - b. Provide itinerary with educational objectives for the day.
 - c. Evidence that program will provide benefit to local programs.
3. Out of State Travel - with Clientele - No Overnight Stays
 - a. **Supervisor approval must be obtained prior to making education trip arrangements.**
 - b. Request authorization from the AED through myUK system.
 - c. Provide a risk management plan **and receive AED approval via email.**
 - d. Provide clear educational objectives for the trip plus an itinerary **via email to the AED for approval.**

- e. **Provide an explanation to the AED** of why the venue or location of the opportunity is the most desirable to meet the educational objectives.
- f. **Expenses for trip may not be reimburse if proper supervisory approval has not been obtained prior to travel.**

International Travel – requiring overnight travel

For International Travel requests, agents must request permission via the myUK system, and provide additional information and justification. Agents also need to complete Request for Authorization of Out-Of- State/Country Travel form and send to their Area Extension Director at least one month in advance for approval.

1. International travel is limited to one trip every three (3) years and will count toward (1) of the (2) allowable out of state trips per year.
2. All international travel must be approved by the Area Extension Director and your appropriate Regional Extension Director. Request approval from AED via email and using myUK with final approval made by the appropriate Regional Extension Director
3. Professional Improvement funds may be used toward any Extension supported International Trip supported by the Program Leaders and with the official approval of the AED and RED.
4. If approved by the appropriate County Extension District Board, Agents who are projected not to use all of their current year County Travel Funds may also request to use these funds toward International Travel once Professional Improvement funds are exhausted. The window to request these projected remaining county travel funds is between May 15th to June 30th. The request would need to be made to your county Extension District Board and the minutes approving the request would need to be sent with your travel documentation to your AED and the Regional Office before county travel funds can be utilized.
 - a. Approval Requests for the trip must include:
 - i. Clear, easy to understand educational objectives with clear benefits to the county program.
 - ii. A descriptive itinerary that clearly links to educational objectives.
 - iii. Explanation of why the venue or location of the opportunity is the most desirable to meet the educational objectives.
 - iv. 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?)
 - v. If agent is traveling with clientele, a risk management plan must be provided.

Youth Travel – Out of County/State/Country Travel or Overnight Travel

Youth is defined as any persons under the age of 18 years old.

1. Any Extension event/program involving youth and travel outside the county or overnight lodging requires a **risk management plan**.
 - a. Approval from AED via email approval and using myUK.
 - b. AED approval must include Risk Management Plan for review and approval.

Official Travel – No Reimbursement from International/State

1. Agents who wish to travel overnight Out-of-State or Internationally on official travel- with no county expenses must:
 - a. Approval from AED via email approval and using myUK
 - b. Agent must make clear who is sponsoring trip with support
 - c. Adhere to same guidelines as Out of State/International Trips. Refer to proper section pending if overnight travel is occurring or not.
 - d. Include justification for professional development trips not associated with Extension professional development organizations.
 - e. Approval from Extension Director via email approval and CC AED

Agents serving in Leadership roles of Professional Associations and Multi-state educational projects/ programs will receive special consideration for exceptions to these rules as determined by the AED, Program Leader, and

Director of Extension.

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

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