



Making the Case: Sample Memo Requesting to Attend the IFTA/IRP Audit Workshop

Are you interested in attending the 2013 IFTA/IRP Audit Workshop? Use and tailor this sample memo to request permission within your organization. This document outlines the benefits of attendance, both to you and to your organization. This memo can be updated for use for either jurisdiction or industry attendees.

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Date

M E M O R A N D U M

TO:

FROM:

SUBJECT: Attending the 2013 IFTA/IRP Audit Workshop

The 2013 IFTA/IRP Audit Workshop, "Audit Smarter: Improving Your Audit Process," will take place Jan. 28-30, 2013 at the Crowne Plaza Riverwalk San Antonio in San Antonio, TX. I would like to request approval to attend this event. The meeting agenda is attached.

I understand that my attendance would be a considerable investment of both time and money, so I have provided a breakdown of expected costs. To ensure the maximum value from this investment, I plan to provide you and my colleagues a full post-meeting report.

The International Fuel Tax Association, Inc.: The International Fuel Tax Association, Inc. (IFTA) is a tax collection agreement by and among the states of the United States and the Canadian Provinces. It provides for the uniform administration of motor fuels use taxation laws with respect to qualified motor vehicles operated in more than one member jurisdiction. IFTA members include the 48 contiguous US states and ten Canadian provinces.

The International Registration Plan: The International Registration Plan (IRP) is a registration reciprocity agreement among states of the United States and provinces of Canada providing for payment of license fees on the basis of total distance operated in all jurisdictions. IRP members include the 48 contiguous US states, the District of Columbia and ten Canadian provinces.

Jurisdiction IFTA/IRP Impact: Our jurisdiction currently licenses approximately [number] IFTA/IRP accounts, from which it collects approximately \$[amount] in license fees.



Industry IFTA/IRP Impact: Our work in IFTA/IRP-related matters includes [list] from which we gain the benefit of [list benefits, including any revenue]. Our company is an affiliate member of IRP, Inc.

2013 IFTA/IRP Audit Workshop: The 15th annual [IFTA / IRP Audit Workshop](#), "Audit Smarter: Improving Your Audit Process," promises to be a rewarding and educational experience for new and experienced auditors alike. Attendees will learn to audit smarter through a series of "hands on" case studies reflecting the entire audit cycle. Valuable knowledge will be achieved through a variety of educational and networking opportunities created with IFTA and IRP auditors in mind. Attendees include both jurisdiction auditors and industry stakeholders.

I have reviewed the conference agenda and determined that [jurisdiction/company] can benefit from my attendance in the following ways [Include any of the following bullets that are pertinent]:

- Implementing upcoming changes in the IRP audit process, informed by discussion adequate and inadequate records.
- Improving interviewing techniques used in the initial conference.
- Using audit data and metrics to manage staff performance.
- Selecting a sample and ensure its representativeness of the whole.
- Determining when a distance adjustment is warranted.
- Correctly applying projections versus isolation.
- Writing a strong audit report that stands up to the scrutiny of stakeholders.
- Running an effective closing conference, explaining and discussing findings in a non-confrontational manner.
- Improving jurisdictions' internal controls.
- Receiving continuing education credit.
- Building relationships with other jurisdictions/organizations, such as [list here].
- Earning credit towards the IRP Advanced Plan Administration Certificate.
- Obtaining ideas about [issue] from colleagues.
- Learning about [session topic], and using that information at the office to [follow-up steps].
- Contributing to the discussions of the IFTA Audit Committee, IRP Audit Committee, and/or Industry Advisory Committee.
- Receiving professional development, in particular, enhancing my work on [any professional goals set jointly with supervisor].

I will take detailed notes and report to management and colleagues about the key lessons learned and the specific actions to take. After the meeting, I plan to share information gained by [list possible ways, such as briefing management on the conference highlights, scheduling a time for a short presentation and Q&A to your colleagues on lessons learned, writing summaries of particular programs for colleagues, or sharing handouts from specific sessions with other staff members].

While I am out of the office, my responsibilities will be covered [describe how].

Taking into account travel and hotel, I estimate the cost to be \$[amount]. See the below worksheet.



IFTA/IRP Audit Workshop
January 28-30, 2013
Crowne Plaza Riverwalk San Antonio
San Antonio, TX

Expense	Details	Cost
Workshop Registration	Early Bird rate for IRP jurisdiction and affiliate members if register by Dec. 5, 2012	\$310 (jurisdiction) \$360 (affiliate)
Flight		\$
Lodging for <u>[number]</u> nights	\$119 per night (government per diem), plus applicable taxes (currently 16.75 percent per room, per night)	\$
Transportation: Airport to/from Hotel		\$
Transportation: Hotel to airport		\$
Parking or mileage reimbursement		\$
Meals	The meeting includes breakfast on January 28, 29 and 30, and lunch on January 28.	\$
Miscellaneous	Internet at hotel, baggage fee from airline	
Total		\$

The opportunity for [our jurisdiction/organization] to gain information and knowledge in [areas] and make contacts would be a wise investment.

Please let me know if anything needs clarification or elaboration and I will be happy to provide additional details. Thank you for your consideration.