

## Escondido Union HSD | BP 3350 Business and Noninstructional Operations

### Travel Expenses

The Governing Board shall authorize payment for actual and necessary expenses, including travel, incurred by any employee performing authorized services for the district.

The Superintendent or designee may approve employee requests to attend meetings in accordance with the adopted budget.

(cf. 4131/4231/4331 - Staff Development)

(cf. 4131.5 - Professional Growth)

Expenses shall be reimbursed within limits approved by the Board. The Superintendent or designee shall establish procedures for the submission and verification of expense claims. He/she may authorize an advance of funds to cover necessary expenses.

The Board may establish an allowance on either a mileage or monthly basis to reimburse designated employees for the use of their own vehicles in the performance of assigned duties.

All out-of-state travel for which reimbursement will be claimed shall have Board approval.

Authorized employees may use district credit cards while attending to district business. Under no circumstances may personal expenses be charged on district credit cards.

(cf. 9240 - Board Development)

(cf. 9250 - Remuneration, Reimbursement, and Other Benefits)

Legal Reference:

#### EDUCATION CODE

44032 Travel expense payment

44033 Automobile allowance

44802 Student teacher=s travel expense

Policy ESCONDIDO UNION HIGH SCHOOL DISTRICT

adopted: August 18, 1998 Escondido, California

## Escondido Union HSD | AR 3350 Business and Noninstructional Operations

### Travel Expenses

Attendees are expected to attend conferences within San Diego County, whenever possible. Annual conferences are to be attended no more frequently than on an every other year basis or less. The following guidelines apply to the reimbursement for travel and other expenses for authorized attendance at conferences, workshops, meetings, classroom/school visitations, and other professional growth activities.

1. All requests for professional leaves for attending conferences, workshops, and meetings that relate to employees' assignments that exceed \$1,000 total anticipated costs, and/or out of state travel, must be approved by the Governing Board prior to attending.
2. The Board agenda item shall indicate as a minimum the following information:
  - a. Role of employee
  - b. Event to be attended
  - c. Location of event
  - d. Dates of attendance
  - e. Total anticipated costs of expenses including travel expenses, registration fees, lodging, meals, parking fees, and miscellaneous expenses of any type
  - f. Funding source
3. A Travel Conference Authorization and Claim form must be completed and submitted to the appropriate site and district office administrator for approval prior to attending any conference, workshop or meeting. Attach a copy of the brochure detailing the conference name, location, date(s), schedule, approximate cost and payment information. This must be completed in order to receive reimbursement for registration fees and travel expenses including use of personal automobiles for conference/meeting attendance purposes.
4. A Travel Justification Form must accompany all Travel Conference Authorization and Claim forms submitted and must detail the following:
  - a. Name of employee
  - b. Event to be attended
  - c. Locations of event
  - d. Date(s) of attendance
  - e. Funding Source
  - f. Justification for conference attendance
  - g. Plan for sharing the professional learning with your site/department upon return
  - h. Travel information as it pertains to conference, airline, hotel and other travel arrangements/reservations.
5. Staff members attending conferences within San Diego County should not plan to lodge at the conference. If there is a particular need for a person to stay at a local conference, prior approval must be obtained from the

Superintendent or his/her designee through the use of the Travel Conference Authorization and Claim form. The Travel Conference and Authorization and Claim form will serve as the mechanism for generation of a purchase order.

6. Expenses for lodging need to be maintained at a reasonable cost and consistent with prevailing rates in the area of travel. Care should be taken to avoid excessively high costs.

Exceptions can be granted with prior authorization from the Superintendent or his/her designee. The following should be noted about hotel accommodations:

a. Reservations will be made for employees only.

b. The district will pay for lodging for the evening preceding or subsequent to a meeting or business event when the employee would have to travel at unreasonable early or late hours to reach his/her destination.

c. The district shall obtain lodging at or near the facility where official district business is to take place to minimize travel time and transportation costs.

d. Employees may share a room with other employees attending the same event, when possible.

7. No meal allowance will be provided to the employee if there is no overnight stay required. No meal allowance will be provided for any meal included in the conference registration fee. Expenses for meals shall be reimbursed when an overnight stay is required, at a standard rate of \$50 per day. Days of travel (leaving from home or duty station/going home or to duty station) will be reimbursed at a rate of \$25 per day. If meals are included in the registration/hotel fee the breakdown for reimbursement of meals not included will be as follows: breakfast - \$10, lunch - \$15 and dinner \$25.

8. The transportation allowance will be based on coach fare by plane. Care should be taken to avoid excessively high costs.

a. Hotel courtesy buses, local shuttle services, or public transportation should be supplementary transportation within the destination city if available and logical. Taxi service shall be used only when no other convenient, less costly modes of transportation are available.

b. Rental vehicles shall be used only when no other mode of transportation is available or when alternate transportation would be more expensive or impractical and must be authorized in advance by the Superintendent or his/her designee. If a rental vehicle is authorized, the district will reserve the lowest cost vehicle category. The district will reserve the rental car, but the employee is responsible for payment and reimbursement will be issued after the conference. Employees purchasing optional insurance offered by the rental agency will do so at their own expense and will not be reimbursed.

c. Please note that airline reservations will be made when this is the lowest cost option for travel and ample time is provided to make the accommodations. Reservations will be made for employees only. Employees shall not limit air travel options by specifying an airline. The airlines offering the lowest fare for a logical route shall be acquired, no upgrades or extended stays. Itinerary and tickets will be emailed directly to the employee upon completion of the reservation.

9. When mileage reimbursement for the use of a personal vehicle is authorized, the district will reimburse at the prevailing Internal Revenue Service mileage rate at the time the mileage expense is incurred, except that such travel allowance shall not exceed the round-trip airfare. Mileage allowances for personal vehicle use will be computed from the district location where the employee is assigned or his/her home, whichever is closer to the activity to be attended.

Final Claim Reconciliation

Employees must account for all actual and necessary expenses on the Travel Conference Authorization and Claim form. Itemized receipts are required for lodging, registration, transportation, (if other than by automobile), and all other reasonable and acceptable expenses incurred for the conference. It shall be the employee's responsibility to produce original receipts and other evidence in order for the claim to be approved. When applicable, tax and gratuity of up to 18% of the actual expenses shall be reimbursed. The following will be accepted as a valid proof of expenditure of receipt:

1. Lodging - itemized hotel bill and canceled check (front and back)/credit card receipt.
2. Registration - canceled check (front and back)/credit card receipt including notice of confirmation with registration amount clearly identified.
3. Transportation - airline ticket receipt, bus receipt, train receipt, and/or statement of miles driven.
4. All other - receipts from taxi drivers, parking receipts, communication for official business, and/or other reasonable and necessary expenses.

Claims for reimbursement should be submitted through the principal or appropriate supervising administrator to the accounting department for approval. Completed Travel Conference Authorization and Claim form is due no later than 15 working days after completion of the activity.

Regulation ESCONDIDO UNION HIGH SCHOOL DISTRICT

approved: June 21, 2011 Escondido, California

revised: June 19, 2018