

Business and Noninstructional Operations

TRAVEL EXPENSES

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

This policy applies uniformly to employees, and Board of Trustees.

District employees are representing the Natomas Unified School District while traveling and should present themselves in a professional manner at all times. If at any time during travel a representative's behavior is deemed to be inappropriate, as determined by current Board Policy 4119.21, "Professional Standards," the employee shall be reprimanded and may lose all future travel privileges.

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

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 authorized employees for the use of their own vehicles in the performance of assigned duties.

Travel expenses not previously budgeted also shall be approved on an individual basis by the Board.

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. 4131 - Staff Development)
- (cf. 4231 - Staff Development)
- (cf. 4331 - Staff Development)
- (cf. 9240 - Board Development)
- (cf. 9250 - Remuneration, Reimbursement, and Other Benefits)

Legal Reference:

EDUCATION CODE

- 44016 Travel expense
- 44032 Travel expense payment
- 44033 Automobile allowance
- 44802 Student teacher's travel expenses

Business and Noninstructional Operations

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Travel includes attendance at workshops, seminars, conventions, conferences or other meetings of interest to the District.

Prior to travel, each employee must obtain approval from their supervisor, and complete a "Conference Request Form" for all overnight travel. The "Conference Request Form" must include estimates for registration, meals, mileage, transportation to/from airport, rental car, parking, airfare, air baggage fee, internet for business purposes, and lodging fees. All costs associated with the travel must be submitted together on one "Conference Request Form". In addition, a separate form must be used for each attendee. The "Conference Request Form" must be signed prior to making reservations or travel arrangements, including conference registration.

Upon approval, a "Requisition for Purchase(s)"/purchase requisition must be submitted and purchase order(s) must be generated before the travel commences. Purchase requisitions/orders must be made to each entity that disbursements will be paid to. For example, a purchase order will be made out, but not sent, to the district's credit card for any applicable hotel and flight expenditures, and a separate purchase order will be made out to the specific employee for mileage and meal expenditures that is expected to be reimbursed more than \$150.

If travel is necessary during the normal work day of the employee and involves no cost to the District other than employee salary and/or mileage within the county, the Superintendent or employees designated by the Superintendent for such purposes may authorize travel, subject to other provisions of this policy.

If travel involves costs to the District other than mileage or the employee salary while absent from the work location, the travel must be pre-approved by the Superintendent or designee. All costs in conjunction with travel shall have been provided for in the District's budget.

When employees of the District are authorized to attend conferences, workshops, meetings and conventions as part of official duties, they will be reimbursed the actual and necessary expenses including traveling expenses incurred in the course of performing services for the District. Employees should make every effort to minimize the cost of the expenses to the District (for example: sharing a taxi, carpooling, using hotel government rate, etc.).

Employees who receive professional growth credit towards salary schedule advancement for attendance at workshops or conferences will **not** receive reimbursement for registration, travel,

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housing or per diem expenses. The employee must pay all additional costs related to professional growth credit unless special arrangements are made with the Superintendent.

The District will not pay conference and/or travel expense for participants and officers of education-based organizations when the organization concerned customarily pays for its participants and/or officers to attend organization activities.

Meals

The rate of reimbursement shall be established annually, based upon the US General Services Administration established per diem rates for any given area, per IRS Internal Revenue Bulletin: 2011-42. In order to be reimbursed at the per diem rate, the employee must substantiate / document the elements of time, place, and business purpose of the travel for that day or partial day. Per diem rates shall be paid for overnight travel only; thus, employees will not be reimbursed for meal expenses not associated with overnight stays. In addition, the first and last day of travel shall be reimbursed at 75% of the full per diem amount, per the US General Services Administration. If an employee will be away at a conference for more than three days or more, the employee may request advance payment for meals. Travel advances will be approved on an individual basis by the Superintendent or designee. Meals may be reimbursed at actual costs only with approval from the Superintendent or Designee. Meals reimbursed at actual cost must be listed on the "Monthly Mileage/Travel Expense Claim" and include **itemized** receipts.

Mileage / Parking /Bridge & Toll

Mileage will be paid at the current mileage rate established by the Internal Revenue Service (www.irs.gov) to those officials and employees required to use their privately-owned vehicle in conducting District business. Employees receiving a mileage stipend shall not receive any reimbursement for mileage expense incurred within forty (40) miles of the District office. Intermittent parking charges for meter, lots, etc., will be reimbursed at actual cost, with the submission of **itemized** original receipts. Unless it is the only option, valet parking fees will be reimbursed at the rate of self-parking fees and any remaining cost will be the sole responsibility of the employee.

When two or more people are departing from the same area and will be traveling to the same activity, carpooling with a minimum of two people per car is highly recommended. Economical use of District funds has priority over personal convenience or preference. Mileage reimbursement will only be provided to the employee owning the vehicle used for transportation and carpooling must be notated on the "Conference Request Form" along with a listing of the

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carpooling attendees. Notation of the individual employees carpooling in the vehicle is also required on the “Monthly Mileage/Expense Claim” when submitting for reimbursement.

All mileage shall be computed from lesser of home or the normal work location to the destination point and return using the most direct route. The following are exceptions to the computation of mileage; however, the employee is still required to submit proof of mileage (i.e., MapQuest):

- Mileage will be computed from residence to destination (less the normal commute) if actual departure is from the residence and if the distance is less than the distance from work location to destination. For example, if an employee lives in Rancho Cordova and the conference is located in Folsom, mileage will be computed from Rancho Cordova to Folsom, less the normal commute mileage. If the conference is located in Woodland, mileage will be computed from the employee’s normal work location to Woodland.
- If the distance is greater from the residence, the employee may still leave from his/her residence but mileage will be calculated from the normal work location to destination.
- Under no circumstances is mileage allowed between residence and normal work location.
- Travel by air will be prepaid by the District. Travel by personnel car will be reimbursed based upon actual miles traveled.

Other expenses

Requests for reimbursements must be submitted on the “Monthly Mileage/Expense Claim” to the Accounting Department within **15** days of the completion of travel. A fully completed “Conference Request Form”, **itemized** original receipts, and the completed “Monthly Mileage/Travel Expense Claim” must be submitted to accounts payable for reimbursement. Any supporting documentation not received within **30** days may be cause for denial of reimbursement.

Only expenses incurred on behalf of the employer will be reimbursed upon presentation of appropriate receipts. Charges for personal goods and services, entertainment and travel not related to District business are considered unallowable and will not be reimbursed to the employee. Any charges not listed on the approved “Conference Request Form” will not be reimbursed. Examples of unallowable expenditures are:

- Personal long distance phone calls
- Laundry
- Room service fees

TRAVEL EXPENSES (continued)

- Alcohol
- Auto rental for personal use
- Movies
- **Non-itemized receipts**
- Copies of receipts (unless authorized by the Superintendent or designee)

Violations

If there is any infraction of the policy above, including failure to obtain authorization of travel prior to travel date, reimbursement of expenses may be denied.

If actual travel primary expenditures (e.g. hotel, conference, meals...) exceed the estimated expenditures listed on the board approved "Conference Request Form" by more than 10 percent, the employee shall provide a written explanation in order to be reimbursed for expenses exceeding 10 percent of estimated expenditures.