

## Business and Non-Instructional Operations

### Travel Expenses

#### **Reimbursement Procedures**

The following instructions must be followed when submitting claims for reimbursement for in-state and out-of-state travel and other incurred expenses:

1. All claims must reference a trip request number, and have a valid budget account number.
2. All claims must be submitted in duplicate with original signatures on all pages.
3. List name of person traveling or incurring expense. Only expenses, or prorated portions, incurred as representatives of the school district are payable.
4. State mode of transportation - railroad, bus, airplane or private car. List amount of fare separately. Vouchers must be submitted in case of private carrier. Car mileage is reimbursed at the current Internal Revenue Service ((IRS) standard mileage rate or as specified in personnel contracts. Travel is computed from and to the school district as starting and completion point. An exception to this rule occurs when an employee begins/completes travel from a point other than the district, and the mileage to/from this other point is less than the mileage to/from the district. In instances such as these, the mileage will be computed as the lesser of the district or the other starting/ending point. If a personal car is used, the travel expense approved will be no greater than the expense that would have been incurred if it had been by airplane. Exceptions to this require prior approval of the immediate management supervisor. When a private car is used, the mileage must be listed in the expense claim. Mileage is allowed based on the official Automobile Club of Southern California mileage chart.
5. Hotel - when traveling on school district business, with proper school district identification, some hotels will grant a special government rate. Employees should request special rates when available.

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### Travel Expenses (continued)

#### **Per Diem**

The Superintendent or designee may approve in advance a per diem rate not to exceed \$75 for meals, tolls, and short-term parking of one hour or less in lieu of other procedures and limits established here within. Other per diem rates may be established by the Board in individual employment contracts.

#### **Claim Forms**

Claim forms are required for the following expenses:

1. Meals - Reasonable expenditures are allowed for meals. Meals will be reimbursed at the following rates with the per diem for meals not to exceed \$45 (except as provided for in individual employee contracts): Breakfast \$10; Lunch \$15; Dinner \$20. With prior approval from the Superintendent and based on special circumstances and locality, meals will be reimbursed at the following rates with the per diem for meals not to exceed \$60: Breakfast \$10; Lunch \$20; Dinner \$30. If any meals are included in the conference registration fees and the employee chooses to eat elsewhere that meal cost will not be reimbursed. **(These new meal reimbursement rates will become effective July 1, 2007.)**
2. Reimbursements may not exceed \$45 per day per diem or a pro-rata rate of \$45 per day (i.e., if the employee is on school business for half of the work day the employee will be entitled to half the per diem rate or \$22.50), except as provided for in individual employee contracts.

If expenses are to be paid for informal meetings, including but not limited to luncheon meetings between the Superintendent and an administrator, or a District board member or a member of the community, the Superintendent or designee is authorized to determine in advance whether or not such expenditures promote District business and whether or not as a matter of policy such expenses can be incurred. Meal reimbursement is acceptable when part of a called meeting (i.e. an official conference luncheon or an official scheduled meeting which includes a luncheon meeting.) The Superintendent or designee shall make the determination whether or not such expenses may be incurred.

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3. Receipts are required for all of the following expenses:
  - A. Taxi-list separately and indicate points of travel
  - B. Telephone or telegrams – list separately all points of call and charges
  - C. Registration, dues, or any other incurred expenses must be substantiated
  - D. Car rental – when a choice of rental service is available, the most economical car rental is encouraged.
  - E. Hotel charges - list separately and support by hotel voucher. Employees sharing a hotel room must submit a travel reimbursement claim for their share of the cost of the hotel room.
  - F. Parking.
4. Gratuities - other than for normal tips for taxis, bellboys, maids (for extended stays), baggage handling, and meals, gratuities are not authorized. If gratuities of an unusual amount or nature are required for a major meeting, convention, etc., they must be approved in advance and detailed on the individual travel expense report.
5. Travel expenses for a spouse are not reimbursable.
6. The Superintendent or designee shall in advance determine if any employee shall be reimbursed for expenses incurred in attending local civic organization functions to the extent that such expenses are incurred in the course of performing services for the school district.
7. Claims must be submitted within a reasonable time after completion of the trip. Unless all directions are adhered to and proper evidence presented, claims will not be processed.