TRAVEL EXPENSES (All Personnel) **AR 4133/4233/4333**

1. TRAVEL REQUEST FORM

All District travel must be authorized in advance through the appropriate Travel Request Form (TR): Staff Travel Request (STR), Student Travel Request, or Consultant Travel Request (CTR), as applicable.

The Travel Request Form serves as the authorization and planning document for District travel. Travelers are responsible for completing the form accurately and providing all required information and estimated costs before submitting the request for approval.

At a minimum:

- **In-district travel:** The Travel Request Form should be submitted at least fourteen (14) calendar days prior to departure.
- **Out-of-district travel:** The Travel Request Form should be submitted at least thirty (30) calendar days prior to departure.
- The traveler must submit the appropriate leave request in Tyler Employee Access for the dates of District travel.
- Personal leave occurring immediately before or after District travel must be requested at the same time as the District Travel leave request.

Travel requests submitted less than the required advance period may not allow sufficient time for required approvals or for the District to obtain the most economical travel arrangements and may be denied or cancelled.

Travel on District business must be approved by the traveler's Principal or Site Administrator and Budget Supervisor, when applicable. <u>All out-of-district travel requires approval by the Superintendent or designee.</u>

The traveler's signature on the Travel Request Form signifies the traveler's agreement to comply with District travel requirements and responsibility for any personal or unauthorized expenses.

The District purchasing/travel department is responsible for coordinating and booking District staff travel in accordance with these procedures. Board member travel shall be coordinated by the Board Secretary, and student travel shall be coordinated by the Student Activities Coordinator or designee.

2. TRAVEL ARRANGEMENTS AND ESTIMATES

The Travel Request Form must include reasonable estimates for all anticipated travel expenses, including, as applicable:

- Airfare;
- Lodging;
- Ground transportation;
- Rental vehicles;
- Mileage;
- Parking;
- Conference or registration fees; and
- Per diem.

Airfare should be the lowest available refundable economy fare using the most direct and efficient route. District-preferred air carriers should be used when available.

Excess baggage fees will only be reimbursed when the baggage is required for District business, and the expense was identified on the approved Travel Request Form. Personal baggage fees are the responsibility of the traveler.

Conference registration should be completed during the early registration period whenever practical. <u>A conference agenda, meeting notice, brochure, email, or other documentation identifying the dates and purpose of the event must accompany the Travel Request Form.</u>

3. LODGING

District-arranged lodging: Lodging should be requested based on proximity to the event location and the most economical rate reasonably available to the District.

Shared economy lodging, including services such as Airbnb, VRBO, or HomeAway, may be used only when approved in advance on the Travel Request Form.

Employee-Arranged Lodging: An employee may request approval to arrange their own lodging in lieu of District-arranged accommodations. When approved in advance on the Travel Request Form, the employee may receive a lodging allowance of **$95.00 per approved night**. The allowance is not a reimbursement of actual lodging expenses and does not require a lodging receipt. Any lodging costs exceeding the approved $95.00 per-night allowance are the responsibility of the employee unless otherwise authorized in advance by the Superintendent or designee.

When meals are provided as part of the lodging rate or conference registration, the traveler shall not claim per diem for meals that were provided.

4. PER DIEM

The District provides a meal and incidental per diem for authorized district travel. The daily rate is $60.00, consisting of:

Meal	**Per Diem**
Breakfast	$10.00
Lunch	$20.00
Dinner	$30.00
Full-Day Total:	$60.00

For the first day of travel, per diem shall be prorated based on the traveler's scheduled flight check-in time. The traveler is eligible for the meals that fall within the travel period beginning at the required flight check-in time.

For the final day of travel, per diem shall be prorated based on the traveler's scheduled arrival time at the destination. The traveler is eligible for the meals that fall within the travel period through the scheduled arrival time.

For purposes of determining meal eligibility, the following time periods apply:

Breakfast: 12:00 a.m. – 11:00 a.m. — $10.00

Lunch: 11:01 a.m. – 3:00 p.m. — $20.00

Dinner: 3:01 p.m. – 11:59 p.m. — $30.00

A full day of authorized travel is eligible for the full $60.00 per diem, *subject to reductions for meals provided by the District, conference, hotel, or other source.*

When a meal is provided at no additional cost to the traveler, the corresponding meal allowance shall be deducted from the applicable day's per diem. For example, a provided breakfast reduces the allowable per diem by $10.00, a provided lunch reduces it by $20.00, and a provided dinner reduces it by $30.00.

Receipts are not required for meals covered by per diem.

5. RENTAL VEHICLES

Rental vehicles are restricted and require advance authorization.

Rental vehicles will not be provided without authorization from the Superintendent, Assistant Superintendent, or designee, as applicable.

A rental vehicle should only be authorized when it is necessary for District business and is more economical or practical than other available transportation. Rental vehicles should not be used for incidental transportation, such as routine travel between the airport and hotel, when courtesy transportation, taxi, rideshare, or other economical transportation is reasonably available.

Wherever practical, lodging should be selected within walking distance of the conference, workshop, or meeting location to reduce the need for rental vehicles.

Employees requesting a rental vehicle must provide a written justification when required by the District.

Generally, only full-size or smaller vehicles will be authorized. Larger or specialty vehicles require prior written authorization from the Superintendent or designee.

When signing a rental agreement for authorized District travel, the traveler should decline optional rental vehicle insurance coverage when the District's insurance provides applicable coverage.

6. TAXI, RIDESHARE, AND OTHER GROUND TRANSPORTATION

Taxi, Uber, Lyft, or other reasonable ground transportation expenses may be reimbursed when necessary to conduct District business.

Whenever feasible, hotel courtesy transportation should be used instead of a taxi or rideshare service for transportation to and from the airport.

When lodging is not within walking distance of the event location, estimated ground transportation costs should be included on the Travel Request Form.

Transportation expenses for personal errands, meals, or other personal activities are not reimbursable.

Receipts must be submitted with the Travel Expense Claim for reimbursable ground transportation expenses.

7. PRIVATELY OWNED VEHICLES

Use of a personal vehicle for District business is <u>strongly discouraged</u> and should only occur when it is in the best interest of the District and has been authorized.

If a personal vehicle is used for District business:

- The driver's license and applicable insurance information must be on file with the District.
- The employee's personal automobile insurance is primary in the event of an accident.

- District travel by personal aircraft is strictly prohibited.
- Mileage will be reimbursed at the Internal Revenue Service Standard Mileage Rate for Business Miles established for the applicable calendar year.
- Reimbursement for mileage shall not exceed the cost of the most economical available airfare for the same trip.
- An airfare comparison obtained approximately two weeks prior to departure must be provided when required by the District.
- A Google Maps or similar mileage verification must accompany the Travel Request Form and/or Travel Expense Claim, as applicable.
- *Fuel expenses are not reimbursable when mileage reimbursement is claimed.*
- If a required mileage log or map is not provided, the employee may submit fuel receipts for reimbursement, when permitted by District procedures.

If travel by personal vehicle requires additional travel time beyond the authorized District travel schedule, the additional time may be charged to annual or personal leave, as applicable.

8. PERSONAL LEAVE AND PERSONAL TRAVEL

Extended personal stays in conjunction with District business are discouraged but may be approved by the employee's supervisor on a case-by-case basis.

Personal travel must be identified on the Travel Request Form whenever known in advance.

Employees are responsible for all additional costs associated with personal travel, including:

- Additional hotel nights;
- Additional airfare;
- Ground transportation;
- Meals;
- Reservation change fees;
- Fare differences; and,
- Other personal expenses.

Employees are also personally responsible for all fees and costs associated with non-District travelers accompanying them on District travel.

Non-employees accompanying a District traveler are not covered by District liability insurance unless specifically identified as an authorized participant, such as a chaperone listed on an approved Student Travel Request or a consultant traveling under an approved Consultant Travel Request. Other non-District travelers must execute the District's required liability waiver before travel.

9. CHANGES TO APPROVED TRAVEL

Once a Travel Request Form has been approved and reservations have been made, any changes to the approved itinerary must receive advance approval from the traveler's supervisor whenever practicable.

All approved changes must be documented on the Travel Expense Claim, including an explanation of the change and the supervisor's approval when required.

The traveler is responsible for costs resulting from personal changes, voluntary delays, traveler negligence, or unauthorized changes.

If a traveler determines that reserved accommodations or transportation will not be used, the traveler is responsible for notifying the applicable vendor within the required cancellation period to avoid unnecessary charges.

10. DURING TRAVEL

Employees traveling on District business are expected to remain available to the District and respond to District communications as reasonably necessary.

District travel is considered official business and does not constitute personal vacation time.

While on district sponsored travel, no employee shall use or be under the influence of any alcoholic beverage, drug or non-prescribed controlled substance, whether that travel is before, during or after school hours.

Travelers must retain receipts and other supporting documentation for all reimbursable expenses.

The District will not reimburse expenses resulting from traveler negligence, personal activities, unauthorized changes, or unapproved travel.

If a traveler voluntarily accepts a delay or changes an itinerary for personal reasons, the traveler is responsible for all resulting costs.

Employees traveling for professional development must coordinate with their supervisor regarding how information or knowledge gained during the travel will be presented and shared with other District staff, when appropriate. Employees who return from professional development will not receive reimbursement for travel expenses until after they have completed a presentation approved by their supervisor.

All employees traveling on District business must comply with the District's Code of Conduct and applicable District policies and procedures.

11. TRAVEL EXPENSE CLAIM

All travel advances and reimbursements shall be documented on the Travel Expense Claim portion of the Travel Request Form.

The traveler must submit the completed Travel Expense Claim, with all required receipts and supporting documentation, <u>within thirty (30) calendar days of returning from travel.</u>

The Travel Expense Claim must be signed by the traveler, supervisor, and budget authority, as applicable, before submission to the purchasing/travel department.

Receipts are required for all reimbursable expenses except meals and incidental expenses paid through the applicable per diem.

The District will reimburse actual and necessary expenses incurred by employees performing authorized District business, subject to the limits established by the Board and these administrative regulations.

Failure to submit the completed Travel Expense Claim within thirty (30) calendar days may result in forfeiture of the traveler's per diem and other reimbursement due for the trip.

<u>Unapproved travel costs will not be reimbursed</u>. Unauthorized travel-related purchases made on a District P-Card are the responsibility of the purchaser/traveler and must be repaid to the District within thirty (30) days.

12. TRAVEL ADVANCES

The District does not ordinarily advance funds to employees prior to travel.

The Superintendent or designee may authorize an advance when necessary to cover anticipated allowable travel expenses. A written justification from the employee may be required.

Any travel advance must be reconciled through the applicable Travel Expense Claim and supporting documentation in accordance with District procedures.

13. RESPONSIBILITY FOR NON-REFUNDABLE COSTS

When an employee has been approved to attend a meeting, conference, training, or other District event, the employee is responsible for non-refundable costs resulting from personal decisions to cancel or modify the approved travel.

This includes, but is not limited to, reservation change fees, cancellation fees, additional airfare, additional lodging, and other costs caused by personal travel changes or traveler negligence.

14. ACCIDENT REPORTING

If a vehicle accident occurs while traveling on District business, the traveler shall:

1. Immediately notify state troopers or local law enforcement, as appropriate.
2. Obtain the names and contact information of all persons involved, witnesses, vehicle owners, and applicable insurance information.
3. Avoid making statements regarding fault, responsibility, or liability except to appropriate authorities.
4. Immediately report the accident to the traveler's supervisor, Human Resources, and the Assistant Superintendent.
5. Provide documentation regarding the accident when requested by the District.
6. If an employee is injured, the employee, supervisor, and Assistant Superintendent shall follow applicable Workers' Compensation procedures.

15. PROCEDURES AND VERIFICATION

The Superintendent or designee shall establish procedures for the submission, approval, processing, and verification of Travel Request Forms and Travel Expense Claims.

The District may establish additional procedures, forms, documentation requirements, and approval processes necessary to ensure that District travel is properly authorized, economical, documented, and consistent with Board policy and applicable law.

(cf. 3300 - Expenditures/Expending Authority)
(cf. 9250 – Remuneration, Reimbursement, and Other Benefits)

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