

SHALER AREA SCHOOL DISTRICT

No: 625

SECTION: FINANCES

TITLE: REIMBURSEMENT FOR JOB RELATED TRAVEL EXPENSES

ADOPTED: SEPTEMBER 16, 1998

REVISED: APRIL 17, 2002; AUGUST 19, 2009

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| | <p>625. REIMBURSEMENT FOR JOB-RELATED TRAVEL EXPENSES</p> <p>1. Purpose Payment of the actual and necessary expenses, including traveling expenses, of an employee, incurred in the course of performing services for the District, whether within or outside the District, shall be reimbursed in accordance with this policy.</p> <p>2. Delegation of Responsibility The validity of payments for job-related expenses shall be determined by the Superintendent or designee.</p> <p>Employees shall be reimbursed at the standard mileage rate set by the Internal Revenue Service when using their personal vehicles for authorized District business.</p> <p>3. Guidelines The Shaler Area School District requests that each employee exercise the same economy as a prudent individual would exercise in traveling on personal business. All reimbursements for travel, meals, and lodging shall be limited to actual and necessary amounts paid for by the individual.</p> <p><u>Travel by Public Conveyance</u></p> <p>The mode of public transportation shall be authorized by the Superintendent or designee and shall be consistent with the efficient and economic conduct of business. Travel shall be by the most direct route. Transportation cost by public conveyance shall be reimbursed on the basis of receipts for the costs involved. If a personal vehicle is utilized when public transportation is recommended, reimbursement will be at the lesser rate.</p> <p><u>Meals and Lodging</u></p> <p>Meals and lodging costs incurred in the process of doing routine business within the School District are not reimbursable. Reimbursement will be made for the costs of meals incurred within the District when the employee's attendance at luncheon or dinner meetings is required.</p> <p>Receipts must accompany all reimbursement requests. Failure to provide a receipt will result in the loss of reimbursement for that item.</p> <p>Reimbursement will be paid for lodging at the lowest available conference rate per day. Receipts must accompany all reimbursement requests. Failure to provide a receipt will result in the loss of reimbursement for that night's lodging.</p> |
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The staff, whenever possible, is requested to share both travel and lodging expenses. All staff is encouraged to be frugal with conference money, thus permitting other staff the opportunity to attend conferences.

The employee will be reimbursed for lodging, airfare, and expenses to and from the airport, and meals. A daily allowance of no more than \$35.00 for three (3) meals, which is to include tips, is the maximum allowance per day. When the trip is for less than one (1) day, the following amounts for individual meals will be reimbursable:

- A. Breakfast \$7.00
- B. Lunch \$10.00
- C. Dinner \$18.00

If an employee is accompanied by a spouse/guest on a trip, the employee is responsible for all expenses incurred on behalf of the spouse/guest. The School District will pay for the accommodations of the employee on a single room basis and the difference between the double room rate and the single room rate will be incurred by the employee.

Out of-Town Trips for One Day

The School District will not normally reimburse the traveler for breakfast or evening meals when the trip is for the day only. However, if the starting time of the meeting attended requires leaving Shaler Area before 6:00 a.m., the traveler will be reimbursed for breakfast. If the meeting attended ends at such a time that the traveler will return to Shaler Area after 7:00 p.m., an evening meal will be reimbursed.

National Conventions/Travel in excess of \$1,500

If one or more employee wishes to attend a national convention and/or participate in a professional development activity that individually or in the aggregate could exceed \$1,500 in total cost, permission from the School Board must be obtained prior to making travel plans for such activity.

Foreign Travel

Administrators and professional employees desiring to travel outside the United States must submit to the Superintendent or designee an itinerary and rationale detailing the benefit(s) of the travel for the District. The employee(s) may be invited to present the request before the Board. The approval of the Board of School Directors is required for all travel outside the United States for which the District reimburses any portion of the expenses incurred or if the employee receives his/her salary or wages for the days during which the travel occurs.

The District's contribution for necessary expenses related to foreign travel shall not exceed \$1,500 for professional employee(s) and \$2,500 for administrative employees per trip or event. Further, an individual professional employee is limited to reimburse for one trip/event per fiscal year. Board approval may also be limited based upon benefit(s) or value to the District, financial resources available, as well as the above restrictions.

Non-Allowable Expenses

- a. Expenditures for laundry, valet service, barber, and similar items are considered personal expenses and are not allowed.
- b. Individual travel insurance is considered a personal matter and the cost will not be reimbursed by the School District.
- c. Under no circumstances are entertainment expenditures reimbursable.
- d. Under no circumstances are alcoholic beverages reimbursable.
- e. Request for reimbursement for the purchase of books and supplies are not to be included on travel expense vouchers.

Request for Travel Advances

Cash advances may be requested for a trip when an employee cannot be expected to advance the total funds required for the trip. Expenses that may be requested are limited to estimated expenses for registration, meals, lodging, and transportation expenses (either mileage for use of privately-owned vehicles, or fares for common carriers). The cash advance is obtained by submitting a request for payment form with an approved Professional Conference Request form. The total cost of the activity must exceed one hundred dollars (\$100.00) to receive an advance. When cash advances are provided, actual receipts must be submitted to the Office of Business Affairs within thirty (30) days.

Reimbursement

Each employee seeking reimbursement of travel/conference costs shall file requests on forms provided with the notification of approval to attend the conference. A complete accounting of all expenses incurred for the conference, including any prepaid items such as registration fees or lodging deposits must be listed on the travel expense form.