

TRAVEL EXPENSES

The Governing Board recognizes that district employees may incur expenses in the course of performing their assigned duties and responsibilities. To ensure the prudent use of public funds, the Superintendent or designee shall establish rules to keep such expenses to a minimum while affording employees a reasonable level of safety and convenience.

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

The Board shall authorize payment for actual and necessary travel expenses incurred by any employee performing authorized services for the district, whether within or outside district boundaries. (Education Code 44032)

The Superintendent or designee shall establish procedures for the approval of travel requests and the submission and verification of expense claims. He/she also shall establish reimbursement rates in accordance with law and Board policy. The reimbursement rate for meals will be adjusted annually on January 1 to the US Department of General Services Meals and Incidental (M&IE) rate for Sacramento (www.gsa.gov/perdiem).

An employee shall obtain approval from the Superintendent or designee prior to traveling. The Superintendent or designee may approve travel requests in accordance with the adopted budget and upon determining that the travel is authorized or assigned by the employee's supervisor, is necessary to attend a conference or other staff development opportunity that will enhance employee performance, and/or is otherwise necessary to the performance of the employee's duties. Travel expenses not previously budgeted may be approved on a case-by-case basis by the Superintendent or designee if he/she determines that the travel is essential and that resources may be obtained or redirected for this purpose.

(cf. 3100 - Budget)

(cf. 3110 - Transfer of Funds)

(cf. 4131 - Staff Development)

(cf. 4231 - Staff Development)

(cf. 4331 - Staff Development)

All out-of-state travel for which reimbursement will be claimed shall be approved in advance by the Board.

Reimbursable travel expenses may include, but are not limited to, costs of transportation, parking fees, bridge or road tolls, lodging when district business reasonably requires an overnight stay, registration fees for seminars and conferences, telephone and other communication expenses incurred on district business, and other necessary incidental expenses.

The district shall not reimburse personal travel expenses including, but not limited to, alcohol, entertainment, laundry, expenses of any family member who is accompanying the employee on BP 3350(b)

TRAVEL EXPENSES (continued)

district-related business, personal use of an automobile, and personal losses or traffic violation fees incurred while on district business.

Except as otherwise provided, reimbursement of travel expenses shall be based on actual expenses as documented by receipts.

Authorized employees shall be reimbursed for the use of their own private vehicles in the performance of assigned duties, on either a mileage or monthly basis as determined by the Superintendent or designee. (Education Code 44033)

The mileage allowance provided by the district for employees' use of their private vehicles for authorized travel shall be equal to the rate established by the Internal Revenue Service.

Vehicles should be shared whenever possible to minimize travel costs. No employee shall be entitled to reimbursement for automobile travel when he/she is transported free of charge, offered district transportation, or by another employee who is entitled to the expense reimbursement.

Meal costs shall be reimbursed based on documented actual expenses within the maximum amounts established by the Superintendent or designee and based on the time of day that travel for district business begins and ends.

Any expense that exceeds the maximum rate of reimbursement established by the district shall be reimbursed only with the approval of the Superintendent or designee.

All expense reimbursement claims shall be submitted on a district form, within 10 working days following return from travel when possible. The form shall be accompanied by receipts and any explanation necessary to document that the expenses meet district criteria for reimbursement.

The Superintendent or designee shall approve expense claims only upon verifying that all necessary documentation is provided and that all expenses are appropriate and related to district business. If an expense claim is disallowed due to lack of documentation or inappropriate expenses, the employee may be personally responsible for any improper costs incurred.

When approved by the Superintendent or designee, an employee may be issued a district credit card for use while on authorized district business. Receipts documenting the expenses incurred on a district credit card shall be submitted promptly following return from travel. Under no circumstances shall personal expenses be charged on a district credit card, even if the employee intends to subsequently reimburse the district for the personal charges.

When necessary, the Superintendent or designee may approve a cash advance, not to exceed the estimated out-of-pocket reimbursable expenses, to an employee authorized to travel on district business. Within 10 working days following return from travel, the employee shall submit a final accounting with all necessary supporting documentation. He/she shall refund to the district any amount of cash advance exceeding the actual approved reimbursable expenses.

TRAVEL EXPENSES (continued)

Legal Reference:

EDUCATION CODE

42634 Itemization of expenses

44016 Travel expense to employment interview

44032 Travel expenses

44033 Automobile allowance

44802 Student teacher's travel expense

Management Resources:

INTERNAL REVENUE SERVICE PUBLICATIONS

Per Diem Rates (For Travel Within the Continental United States), Publication 1542

WEB SITES

Internal Revenue Service: <http://www.irs.gov>

U.S. General Services Administration, Per Diem Rates: <http://www.gsa.gov/perdiem>

Policy
adopted: January 28, 2014
revised: April 5, 2022

VISALIA UNIFIED SCHOOL DISTRICT
Visalia, California

TRAVEL EXPENSES

The Superintendent or designee may approve an employee request to attend meetings in accordance with the adopted budget. The District shall pay for actual and necessary expenses incurred by any employee performing authorized services for the District.

Prior to Travel

1. Prior to travel, a Request to Attend Conference form should be properly completed. The Estimated Costs column and Request/Approval to Attend Conference signature sections of the request form should be completed. A copy of the form is to be submitted to the Finance Department.
2. Separate requisition forms are required for registration, lodging, transportation, or other costs that are to be pre-paid and should be submitted to the Purchasing Department with a copy of the signed Request to Attend Conference form.
3. District Credit Cards may also be utilized to pre-pay registration, lodging, transportation, or other expenses in lieu of requisitions. A copy of the Request to Attend Conference form should be maintained and submitted when District Credit Card statements are being processed. If the funding source for the travel is from a categorical budget, authorization from the Compensatory Education Department must be obtained prior to placing the charge on the District Card. Compensatory Education authorization is to be documented on the Request to Attend Conference form.

Upon Return

1. Upon return, the traveler is to complete the Actual Costs column of the original Request to Attend Conference form. The original with signatures is to be submitted to the Finance Department, along with all receipts for travel, lodging, meals, parking, and toll fees. If meal expenses exceed Board limits, all receipts and justification for the overage are to be attached. If Actual Costs are greater than Estimated Costs in any expense category, the form must include an authorized signature in the Request for Reimbursement section.

Special Circumstances

1. If the timing or location of the event is such that requires the employee to travel the day prior to the event, it is the policy of the Board to reimburse the employee for lodging and one-half the meal limit rate described herein, if travel begins after noon, or the full rate if the trip begins before noon.

TRAVEL EXPENSES (continued)

2. Costs incurred that will not be reimbursed by the District include alcoholic beverages, recreation fees, dry cleaning, auto repairs, gifts, etc., and all expenses related to an employee bringing guests along on the trip. These expenses shall not be considered necessary and will not be reimbursed.
3. Personal credit cards may be used for travel; however, finance charges incurred will not be reimbursed.