William S. Hart Union HSD

Board Policy
Travel Expenses

BP 3350
Business and Noninstructional Operations

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. The Superintendent also shall establish reimbursement rates in accordance with law and Board policy.

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)

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

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 or by another employee who is entitled to the expense reimbursement.

The Superintendent or designee shall establish a per diem allowance for meal costs incurred while traveling on District business based on the location and hours of travel.   The per diem allowance shall not exceed the standard meal allowance for business-related travel prescribed for federal income tax purposes.

~~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.

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 WILLIAM S. HART UNION HIGH SCHOOL DISTRICT
adopted: August 11, 1993   Santa Clarita, California
revised: April 30, 1997
revised: October 15, 2014