

William S. Hart Union HSD

Administrative Regulation

Travel Expenses

AR 3350

Business and Noninstructional Operations

This regulation applies uniformly to employees, Governing Board trustees, and representatives of the Governing Board.

Travel Requests

It is the District's intent to approve requests to attend authorized meetings or conferences relating specifically to the employee's job description when attendance will enhance the employee's job knowledge and/or job performance. All travel requests and reimbursements shall be made in the employee's legal name as shown in the District's official payroll records.

All travel requests shall be as follows:

1. Within the budgeted amount and within the appropriate budget category and/or funding source pertaining to the requested travel. Travel expenses not previously budgeted may be approved on a case-by-case basis by the Superintendent or designee, if he/she determines the travel is essential and that resources may be obtained or redirected for this purpose.
2. Recommended for approval by the employee's immediate supervisor and approved by the Superintendent or designee in advance of the travel. Requests for mileage and/or parking reimbursement only do not require advance approval by the Superintendent or designee.

Mileage Reimbursement

Mileage is defined as any mileage occurring during any one day that arises from the travel to and from any authorized meeting, conference, or other authorized District business. Except as provided below, mileage shall be calculated from the employee's regular work location to the authorized destination(s), and shall also include the employee's return to the regular work location. Mileage shall only be paid when the driver and vehicle used are appropriately licensed and insured.

In the event the employee does not visit the regular work location prior to the first trip in any one day, the District shall deduct the lesser of the following from the total mileage:

1. Distance from the employee's home to the first stop; or
2. Distance from the employee's home to the regular work location

In the event the employee proceeds from the final destination in any one day to the employee's home, the District shall deduct the lesser of the following from the total mileage:

1. Distance from the last destination to the employee's home; or

2. Distance from the employee's home to the regular work location

When mileage and/or parking reimbursement are the only travel expense, the employee shall complete a Mileage Expense Claim Form for immediate supervisor approval. The form shall be submitted for reimbursement within 60 days following the date the expense was incurred. Expenses incurred during the last quarter of the fiscal year shall be submitted no later than ten working days after June 30th.

The District shall use the then-current Internal Revenue Service standard mileage rate for business to calculate per-mile mileage reimbursement.

Monthly Mileage Allowance

The Superintendent may establish a schedule for monthly mileage allowances for designated employees to reimburse such employees for the use of their own vehicles in the performance of their assigned duties.

Monthly mileage allowances shall cover the following expenses associated with attendance at authorized District, community, conference, and other business-related meetings:

1. Mileage, within seventy-five (75) miles one-way of the District Office
2. Parking, up to ten dollars (\$10) per day
3. Toll road and toll bridge fees
4. Mileage, to and from the airport and other common carrier services

The District may reimburse expenses in excess of those itemized above through the established travel reimbursement procedures outlined herein.

Travel Reimbursement

To be eligible for travel reimbursement, a Request for Authorization for Travel/Conference Attendance Form shall be properly completed and submitted for approval no less than 15 business days before departure. Travel expenses shall only be reimbursed if the travel has been properly approved.

Travel reimbursement may not be claimed for additional expenses that arise from the coordination of employee vacation/leave with official District business travel.

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

Lodging

In the case of a conference, reimbursable lodging shall not exceed the single occupancy rate offered by the conference's headquarter hotel.

In all other cases, reimbursable lodging shall be based on single occupancy rate for a standard hotel room.

Suites and other larger room facilities are generally not reimbursable. A single suite or adjoining room for small group gathering or seating may be reimbursable when a group of eight (8) or more District

employees are traveling together at a conference and require a common meeting or gathering point to facilitate communication and activities associated with the conference.

An itemized receipt from the hotel is required for reimbursement.

Meals

Reimbursement shall be based on the District per diem rate

No receipts are required and reimbursement is limited to the District per diem rate. A **copy of the conference registration form/itinerary** showing the schedule of events and meals provided is required for verification purposes.

District per diem rate:

If travel begins before 7:00 AM or ends after 9:00 AM	Breakfast \$12
If travel begins before 7:00 AM or ends after 2:00 PM	Breakfast & Lunch \$30
If travel begins before 11:00 AM or ends after 2:00 PM	Lunch \$18
If travel begins before 11:00 AM or ends after 7:00 PM	Lunch & Dinner \$48
If travel begins before 5:00 PM or ends after 7:00 PM	Dinner \$30
If travel begins before 7:00 AM or ends after 7:00 PM	Breakfast, Lunch, & Dinner \$60.00

Beginning and ending travel time is defined as follows:

- Departure is the time an employee begins their travel. Departure can be from either the employee's workstation or home, whichever is later.
- Return is the time an employee returns to their home or workstation at the completion of their travel, whichever is earlier.
- Reasonable travel times will be applied to determine beginning and ending travel.

Meal reimbursement may not be claimed if meals are provided as part of a conference fee. In such circumstances, if the employee elects to have a meal outside of the conference provisions, the cost is the responsibility of the employee and is not reimbursable.

Other Travel Allowances

While traveling on official District business, the expenses listed below are reimbursable at actual cost, provided an itemized receipt, sufficient to determine the actual cost and circumstances surrounding the incurred expense, is submitted:

1. Necessary taxicab, airport shuttle, or bus fares for transportation in and around the travel destination
2. Conference registration fees, excluding any portion designated as a membership fee
3. Telephone, fax, or internet services in connection with District business
4. Necessary rental car charges

5. Other justifiable expenses may be approved based on a review of special circumstances

Car Rental

The use of rental cars is limited to situations where commercial transportation facilities either are not available or their use is impractical or more expensive. The rental car should be refueled prior to returning it to the agency to avoid refueling charges.

Rental cars require prior approval. For any potential vehicle rental, contact Business Services for the current contract for rental companies and the insurance provisions.

When a rental car is authorized, reimbursements for taxis, Uber, or other alternative travel methods will not be authorized.

Transportation by Common Carrier

The mode of travel shall be the most reasonable means available, taking into consideration requirements and costs for lodging and employee time devoted to travel at the expense of performance of other duties.

Reimbursement shall only be made for air travel at coach rates, unless specifically authorized due to availability, pre-determined accommodation needs, or other special circumstances.

Self-park at conferences, hotels, and airports is reimbursable. Requests to utilize valet parking will be addressed on a case by case basis based on available options at the destination.

Itinerary changes or fees may be reimbursed depending on the circumstances.

Itinerary changes and other changes or special circumstances encountered while in travel status shall be documented in writing and submitted with the request for reimbursement.

A receipt, including fare stub, is required for reimbursement.

Transportation by Private Vehicle

Any driver and vehicle utilized shall be appropriately licensed and insured. Reimbursement shall not be made for transportation by motorcycle.

The reimbursement for transportation by private vehicle shall not exceed the cost of air coach fare from Los Angeles, California to the destination.

When it has been determined that transportation by private vehicle is the most appropriate and economical means of transportation, reimbursement for actual mileage traveled will be at the then-current Internal Revenue Service standard mileage rate for business for per-mile mileage reimbursement.

Whenever possible, car-pooling is encouraged. In such cases, only the employee whose vehicle is used shall claim reimbursement.

Travel Advances

Travel advances are not the preferred manner of paying for travel-related expenses. However, when necessary, the Superintendent or designee may authorize an advance of funds to cover necessary expenses.

Consideration of a travel advance shall be based on the submission of a Request for Authorization for Travel/Conference Attendance Form to the Superintendent or designee describing the circumstances and the justification of the advance.

Travel advances shall be limited to no more than seventy-five (75) percent of the anticipated expenses to be borne by the employee while on travel status.

Employees receiving travel advances shall furnish a completed Itemized Expense Claim Form and all relevant receipts within ten (10) working days from returning from the travel. If the travel advance exceeds the actual cost of travel, the employee shall provide the difference in funds in a manner acceptable to the District at the time the expense claim is submitted.

Large Group Travel

Large group travel is defined as eight (8) or more employees traveling from their location to the same destination.

Every effort should be made to coordinate the travel arrangements for large groups.

Promotional Items Received During Official Travel

Transportation for official business shall not be arranged on a common carrier or lodging arranged at a specific property solely to obtain points, free tickets, or any other amenities or gifts.

Free upgrade to a higher class, airline mileage, trip accumulation programs, executive club membership, and other privileges, which can be used only by the employee may be retained by the employee and shall not be turned over to the District. Unsolicited promotional materials of nominal intrinsic value (pens, note pads, calendars, etc.) may be retained by the employee.

If the receipt of any promotional item received from official travel results in the loss of work/duty time, the employee shall either 1) report the additional time as vacation, or 2) retain use of the promotional item for future official District business by the employee.

Authority to Override Limits or Restrictions

Except as provided herein, the Superintendent or designee by his/her signature on a written memorandum attached to the travel/conference approval form may override any of the above limits and restrictions when special circumstances justify such action.

Travel Approval

Approval of all requests for in-state travel and reimbursement of travel expenses shall be as follows:

1. Principal/Director
2. Special Programs, if categorical funds are used

3. Appropriate Cabinet representative

Approval of all requests for out-of-state travel and reimbursement of travel expenses shall be as follows:

1. Principal/Director
2. Special Programs, if categorical funds are used
3. Appropriate Cabinet representative
4. Superintendent or designee
5. Governing Board

Approval of all requests for travel and reimbursement of travel expenses by Cabinet Representatives shall be as follows:

Superintendent or designee

Approval of all requests for travel and reimbursement of travel expenses by Superintendent shall be as follows:

Chief Financial Officer

Approval of all requests for travel and reimbursement of travel expenses by Board Members shall be as follows:

Superintendent

Regulation
approved: April 30, 1997
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WILLIAM S. HART UNION HIGH SCHOOL DISTRICT
Santa Clarita, California