

POLICY

2005

5380

Non-Instructional/Business
Operations

SUBJECT: TRAVEL/CONFERENCE EXPENSE REIMBURSEMENT

School district employees, officials and members of the Board of Education will be reimbursed for reasonable, actual and necessary out-of-pocket expenses which are legally authorized and incurred in the performance of their district-related activities or while traveling for district-related activities.

Travel shall be by the most practical means available, whether by private automobile, school vehicle, or common carrier. Reimbursements for air travel shall not exceed the cost of coach class airfare. Reimbursements for travel by private automobile shall be limited to the prevailing mileage rate established for business travel by the Internal Revenue Service. Only expenses necessary to the purpose of the travel shall be reimbursable. Transportation costs such as taxi cabs are allowable only for essential transportation.

Likewise, lodging and meals shall be reasonable and practical.

The Board, by majority vote, shall determine and approve which meetings and conferences may be attended by Board members and the Superintendent of Schools.

The Superintendent, or his/her designee, shall reserve the right to determine whether attendance by district staff at any conference or professional meeting is in the best interest of the district and eligible for reimbursement of expenses under this policy.

To obtain reimbursement, the claimant must complete and sign a Travel/Conference Reimbursement form with all receipts or other expense documentation attached, together with a copy of the approved Travel/Conference Request form and the evaluation report stating the benefits derived from the conference. After the appropriate administrator has approved the reimbursement form, the claimant shall submit all documentation to the Business Office for final determination of reimbursable expenses.

Regulations concerning expense reimbursement shall be attached to this policy and shall be reviewed annually by the internal auditor and revised as appropriate.

Education Law §§1604(27); 1709(30); 1804; 2118;
3023; 3028
General Municipal Law §77-b

Adopted: 7/05/2005
Amended: 12/21/05

EXPENSE REIMBURSEMENT REGULATIONS

The district shall reimburse district employees, officials and members of the Board of Education for reasonable, actual and necessary out-of-pocket expenses incurred while traveling for school-related business upon receipt of a completed voucher with itemized receipts along with approved attendance form. The following rules shall guide the reimbursement of school-related travel expenses:

Definitions

Out-of-district – shall be defined as all travel to locations other than a facility operated by the District where such travel is not considered part of the normal job function (i.e. interscholastic activities, field trips, etc.). To be eligible for reimbursement, one-way travel mileage must be 50 miles or more, excluding travel to New York City, measured from the employee's normal work location to the location of the conference.

Reasonable expenses – shall be defined as those expenses that would be incurred out of necessity to maintain a normal living standard rather than to fulfill personal desires.

Procedures

All employees, officials and members of the Board of Education who plan on attending a conference or traveling out-of-district for school related activities must complete a Travel/Conference Request Form. The request forms must be pre-approved as follows:

Cost incurred by	Required Approval
Building staff	1) Department Chairperson and Building Principal AND 2) Designated Assistant Superintendent
Department Chairperson	1) Building Principal AND 2) Designated Assistant Superintendent
Principal	1) Designated Assistant Superintendent AND 2) Additional Cabinet member
District Office staff	1) Designated Assistant Superintendent AND 2) Additional Cabinet member
Superintendent	Board of Education (Business Manager if total costs are less than \$250)
Board Members	Board of Education

In addition to the aforementioned approvals, all Travel/Conference Requests for estimated expenditures of \$1,500 or more must also be approved by the Board of Education.

Final approval for all requests for reimbursement shall be determined by the Business Manager. Under no circumstances may an employee approve their own expense. Final approval for reimbursement requests by the Business Manager shall be issued by the Superintendent.

Transportation

- Travel shall be by the most economical method, whether by private automobile, school vehicle or common carrier such as bus, train or plane.
- If travel is by private automobile, mileage shall be reimbursed at the level approved by the Internal Revenue Service for business travel. Parking and tolls will also be reimbursed but gasoline will not as this is factored into the IRS mileage allowance. Fines for parking and traffic violations incurred during district approved travel are not reimbursable.
- Car rental expenses will be reimbursed only if authorized in advance. Reimbursement shall be limited to the rental cost for a mid-size car (full-size if more than 2 people are traveling together). Rental cars should be refueled prior to being returned as the cost charged by rental agencies is prohibitive. Original receipts must be attached.
- Air travel is only allowed when determined by the Board President or the Superintendent to be in the district's best interest. Air travel shall be reimbursed at the lowest feasible fare available and shall not exceed regular coach class fare. Travel arrangements should be made as soon as reasonably practicable so as to avoid payment of a higher fare due to a late booking.
- Rail travel shall be reimbursed provided it is less than the covered air fare to the destination or if used for travel within the metropolitan area.
- Local transportation costs, such as taxis, shall be reimbursed for essential transportation purposes only. Examples of reimbursable expenses include airport drop-off and pick-up, and travel between conference site and hotel accommodations.

Lodging

- Persons traveling on district-related business are expected to secure the most reasonable rate for necessary hotel accommodations. The district will reimburse for actual lodging fees up to the maximum lodging fee set by the federal government for that location. The rates can be found on the United States General Services Administration website at www.gsa.gov. **Please ask for the government rate when booking. If accommodations cannot be secured within these guidelines, it is necessary to obtain and attach three rates from the area.**
- When the rate is pre-determined by the organization sponsoring the event, the traveler shall secure a room rate at no more than the pre-determined rate notwithstanding what the federal travel reimbursement rate is. Hotel accommodations at a rate other than the most reasonable rate or a pre-determined rate described above will be reimbursed only if approved by the Board President (for members of the board and the Superintendent) and the Superintendent (for all others) prior to the stay.

Meals

Reimbursement for actual meal expenses shall be limited to the maximum per diem rate established by the **Board of Education Guidelines** *United States General Services Administration*. **Those guidelines are Breakfast, \$10; Lunch, \$15; and Dinner, \$25.** *Regional rates are available on their website at www.gsa.gov. The per diem rate includes the cost of food and customary gratuities.* Alcoholic beverages *and New York State sales tax* are not reimbursable. Itemized receipts showing the individual items must be attached to the reimbursement request form.

Personal Expenses

The district does not reimburse persons traveling on district-related business for personal expenses including, but not limited to, pay television, hotel health club facilities, alcoholic beverages, theater and show tickets, and telephone calls and transportation costs unrelated to district business.