

TRAVEL

BACKGROUND INFORMATION

In accordance with Policy 3350, employees may be directed or permitted to attend conferences, meetings of commissions, to travel for the purpose of recruiting personnel, to visit other school districts, to appear before legislative committees, and to perform other out-of-district travel which is in the interests of the school district.

PROCEDURE

1. Determine authorizations and forms required for the travel that is being requested (E 3350).
2. Employees must endeavor to minimize costs while traveling on District business.
3. Requests for travel that have registration and other fees but which do not require travel by air, train, or bus and/or an overnight stay, and which are not out of the State, may be approved by the immediate administrative supervisor, and submitted for approval ratification from Executive Council and the Board of Education.
4. All overnight travel, travel out of the state, or travel requiring transportation by airfare, trainfare, or busfare shall be pre-approved by the Executive Council or Superintendent and submitted to the Board of Education for approval prior to the travel date, including when any part or all of the expenses are paid in advance or reimbursed by another entity.
5. The following steps refer to all travel requiring Executive Council and Board of Education approval:
 - a. Complete form 64-550 "Travel Request Requisition."
 - b. Obtain approval from immediate supervisor and program director with budget authority.
 - c. When registration fees are to be prepaid by the District or hotel reservations require a purchase order, submit the registration form and/or hotel information along with the travel request.
 - d. Travel requests and accompanying documents must be submitted to the Business Services Department at least ten (10) working days prior to the Board meeting for review by Executive Council. Refer to the Travel Request Requisition Submission Deadlines document, which will be updated annually by Business Services and can be obtained via the District website.
 - e. If advance funds are required, a minimum of 14 days after Board of Education approval is necessary to issue a warrant.
6. Advance funds may be granted to cover necessary expenses of the trip. The minimum amount of advance is \$35.00. Funds can be advanced for:
 - a. Full conference registration
 - b. Public transportation.
 - c. Meals.
 - d. Lodging – copy of preregistration form must accompany request for estimated lodging cost.

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Advance funds remaining after completion of any travel are to be returned to the District accounting office within ten (10) working days of the employee's return.

A Travel Reimbursement Claim, Form 64-551, must be completed and submitted to the immediate supervisor for all travel requiring a Travel Requisition, Form 64-550. Original itemized receipts are required for registration fees, lodging, transportation, and parking. Form 64-551 is to be returned to Business Services within ten (10) working days after returning from travel. If travel expenses incurred exceed original Board approved amount by \$50.00 or 10%, whichever is higher, the additional expenses will be resubmitted to the Executive Council and Board of Education for approval prior to reimbursement.

GUIDELINES

1. Employees should endeavor to minimize costs while traveling on District business. However, it is not the District's intent that the employee should undergo hardship while traveling.
2. Although registration forms may include provisions for simultaneous payment of membership dues in the sponsoring organization, the District will not pay for the cost of membership dues for individuals regardless of whether discounts apply.

The District will reimburse for meals for travel requiring an overnight stay at the following per diem rates*:

- a. Breakfast = \$10.00
 - i. Only reimbursable under the following conditions:
 1. Meal is not included in registration cost, AND
 2. Meal is not provided free of charge by host, AND
 3. Travel begins by 6am and ends after 9am
- b. Lunch = \$15.00
 - i. Only reimbursable under the following conditions:
 1. Meal is not included in registration cost, AND
 2. Meal is not provided free of charge by host
 3. Travel begins by 11am and ends after 2pm
- c. Dinner = \$30.00
 - i. Only reimbursable under the following conditions:
 1. Meal is not included in registration cost, AND
 2. Meal is not provided free of charge by host, AND
 3. Travel begins by 4pm and ends after 7pm
- d. Daily Total = \$55.00
 - i. Only applicable when all three (3) meals are included for reimbursement
 - ii. Otherwise, the Daily Total Maximum is the sum total of the maximums for the applicable meals

*Per diem rates do not apply when an event meal is paid for directly by the District to the vendor or event host.

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3. An Employee or Board member may opt to be reimbursed for meals associated with travel that does not require an overnight stay, subject to the above limitations, as long as the following criteria are met:
 - District Business event occurs outside of District boundaries
 - The event is scheduled for a minimum of five (5) hours

These meal reimbursements will be treated as wages and are subject to all applicable state, federal, and employment taxes. Reimbursements for meals while traveling for District business not requiring an overnight stay will be reported as earned income and reported on the employee's W-2. Employees are strongly encouraged to consult a tax professional before requesting reimbursement.

Legal Reference:

EDUCATION CODE

44016 *Travel expense*

44032 *Travel expense payment*

44033 *Automobile allowance*

44802 *Student teacher's travel expense Board Policy Reference: BP 3350*

Adopted: November 19, 1985

Regulation Revised: November 1, 2005; April 17, 2007; July 1, 2010;

May 7, 2013; May 29, 2013; March 16, 2015; September 6, 2016;

February 19, 2019, March 4, 2020; December 17, 2021; May 3, 2022

SANTEE SCHOOL DISTRICT

Santee, California