

Salinas Union High School District

EMPLOYEE TRAVEL EXPENSES

1. Purpose

- a. Employees of the Salinas Union High School District are authorized to attend certain meetings and conferences when these are required in or related to the business of the school system or are for the purpose of curriculum improvement.

2. Authorization

- a. Travel, lodging, and subsistence expenses incurred by an employee while attending such meetings will be repaid to him by the District provided proper prior authorization has been granted.
- b. Administrative heads may grant, within budgeted funds, authorization to subordinate staff members. Administrative heads are: Superintendent, Associate Superintendent, Assistant Superintendent, Principals, Director of ROP/Career Education, Director Categorical Programs and Director of Pupil Personnel Services.
- c. The Superintendent shall be informed in writing of all such authorizations granted by administrative heads whose offices are not located in the administration building.

3. Authorized expenses

- a. Employees will have expenses in the course of their duties. E.C. 44032 provides for the "payment of the actual and necessary traveling expenses."
- b. "Actual and necessary" expenses are determined to be:
 - 1) Expenses at a level which do not exceed that which would be incurred by the employee were the expense a personal one. The level is considered to be an "average level" as opposed to "low" and "high." The Golden Rule is, "Would I want my employees, were I the sole owner of a profit and loss business, to claim these expenditures from me at this 'level of living'?"
 - 2) Expenses that do not exceed the State of California identified meal reimbursement rates.
 - (3) Travel
 - (a) Travel by auto, plane, or bus may be authorized.

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- (b) Within a 200-mile radius of Salinas, auto travel would be the expected mode. If the employee actually travels by train or bus, then train or bus fare paid will be reimbursed.
- (c) Beyond a 200-mile radius, factors of cost of lodging, meals, and substitutes must be taken into account in authorizing the means of travel:
 - 1- The cost of travel by auto, plane, train, or bus should be estimated including required costs of meals, lodging, and substitutes.
 - 2- It may be more economical for the administrative head to authorize plane fare rather than train or bus fare in order to avoid leaving a day earlier which would involve extra meals and/or lodging and/or substitute costs.
 - 3- It may be more economical for the administrative head to authorize auto travel rather than train or bus fare.
- (d) When two or more staff members attend the same meeting, the administrative head should, in considering alternative cost estimates, consider the fact that two or more members traveling by car may be a more economical means than train, bus, or plane fare for each. Administrative heads should attempt to coordinate their authorizations with other schools.
- (e) When two or more staff members attend the same meeting and auto transportation is authorized, it is expected that the administrative head will authorize mileage for only one of the staff, with other members required to travel in the one authorized auto.

Administrative heads should attempt to coordinate their authorizations with other schools.

- (f) The fact that a staff member chooses to have his/her spouse accompany him/her on a trip shall not be a factor in considering the most economical mode of transportation. If the employee is authorized to travel by plane as being more economical than auto travel, then the employee is to be reimbursed for the lower cost, i.e., for plane fare, even though he/she actually traveled by auto.
- (g) The fact that a staff member chooses to drive his/her own car, when transportation is available in another staff member's car and there would thus be only one mileage cost to the District, for personal reasons such as not wishing to leave when the pool car is leaving or because he/she does not wish to return in the pool car immediately after the meeting has ended, does not justify reimbursement for mileage expenses or for any extra lodging or meal expense.

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- (h) Authorization to travel by plane includes authorization for reimbursement of incidental expenses such as taxi fares to and from the airport. It also includes authorization for reimbursement of mileage expense to and from the member's home and the Salinas, Monterey, or San Jose airports.
- (i) A yearly allowance of \$750.00 for travel within the District will be paid as follows:

- Associate Superintendent – Instruction
- Assistant Superintendent – Business
- Assistant Superintendent – Human Resources
- Director of ROP/C
- Director of Human Resource
- Director of Curriculum
- Director/Principal-Adult School
- Principal/High School
- Principal Cont. HS/Dir I.S./PPS
- Director of Categorical Programs
- Principal/Middle School
- Director Research, Assessment and Accountability
- Director SPED/GATE/Counseling/Guidance
- Assistant Principal/High School
- Assistant Director of ROP/C
- Assistant Principal/Middle School
- Assistant Director/ Adult Ed
- Voc. Coordinator ROP/C
- Director of Student Activities
- Administrative Intern II
- Administrative Intern I
- Budget Analyst
- Manager of Planning and Facilities
- Manager of Food Service
- Manager of Maintenance, Operations, Transportation and Safety (MOTS)

In lieu of the yearly allowances, actual mileage may be claimed.

Travel outside the District in addition to the above, and travel by all other staff members who use their private automobiles on District business, will be reimbursed at the rate currently identified as the official mileage rate of the Internal Revenue Service.

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4. Non-reimbursable expenses:

- Air travel insurance
- Membership dues
- Personal telephone calls and personal services such as laundry
- Entertainment
- Excise tax
- Snacks between meals
- Alcoholic beverages

5. Reimbursable expenses requiring receipts:

- Motel or hotel accommodations
- Registration fees
- Transportation by public carriers other than taxi or intra-city bus fares, plane, train, bus or car rental
- Streetcar fares, ferry fares, bridge tolls, taxi, hotel bus fares and parking
- Tips
- Long-distance or telegraph charges required in the performance of official duties-if place and person called are shown

6. Reimbursable expenses not requiring receipts.

Meals

7. Itemization of expenses on claim form.

- a. The claim form should leave a clear audit trail; each expense should be clearly identified.
- b. List expenses for each day:

Meals

Identify the meal(s) consumed each day and the amount paid. In no case shall the amount claimed exceed the aggregate maximum allowed for the meals consumed

If lump sum charges are made on the hotel bill or on credit card, the amount shown shall not exceed the aggregate per diem maximums

Lodging

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Indicate date, if more than one day, claim total as one figure but indicate dates lodging furnished

Other Expenses

8. Approval of claim form by administrative head.
 - a. Each administrative head is required to grant or reject the staff member's claim.
 - b. The signature of the administrative head is interpreted to mean acceptance of responsibility in administering the Travel and Conference Expenses regulation and approval of each item on the claim.
 - c. A claim for reimbursement will not be processed on the basis of one signature. Each staff member's claim must be countersigned by a higher authority.

Staff Members	Administrative head approves and signs (i.e., Principal countersigns for his/her staff)
Administrative Heads	Next higher administrative head approves and signs (i.e., Assoc. Superintendent Instructional Services/Asst. Supts. Business and Personnel for those who report directly to him/her)
Principals, Assoc. & Asst. Supts.	Superintendent approves and signs

NON-EMPLOYEES

1. Students
 - a. School districts are not permitted to pay for expenses of students attending meetings, i.e., travel, meals, lodging, except as described in b.
 - b. Expenses may be paid only in those instances wherein it can be stated positively that such attendance at meetings is necessary for the benefit of the District and not for the student; the student is in attendance as an agent of the District, not as a student. An example of a proper expenditure would be wherein the District needs student input at the meeting or as a result of the meeting, input necessary for the guidance of the District.

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- c. Expenses will be reimbursed only if the administrator in charge states on the claim form that "attendance of this student at this meeting was for the District's benefit, not for the student's benefit."

2. Special Projects

- a. In some special projects, provision is made for payment of personal expenses of students, i.e., meals, dental examinations, vision testing, etc. In these situations, expenditures are to be submitted on the Employee Claim for Reimbursement form and must be approved by the administrator in charge of the project.
- b. In some special project activities, provision is made for payment of expenses of parents or community representatives on advisory committees. Expenditures are to be submitted on the Employee Claim for Reimbursement form and must be approved by the administrator in charge of the project.
- c. All project expenditures under a. and b. above are subject to review by the Business Office and outside auditors. It is strongly recommended that in advance of making any commitment to students or parents for such expenditures, the concurrence of the Business Office that they are allowable under terms of the grant be obtained.

3. Student Body Expenditures for Staff

- a. Advisors to student groups may upon occasion incur expenses for travel, meals, or lodging in connection with extracurricular activities of the student club which do not relate directly to class activities and are not to be paid for with District funds for either the students, accompanying advisor, or parents. Such expenses as entry fees, meals, transportation and lodging are considered actual and necessary expenses by the students, and student groups are authorized to pay such expenses for the advisor(s) and chaperon(s). The advisor is required to comply with provisions of
- b. Administrative Regulation 3326.5 and to submit Form HSD 98 (indicating student organization payment rather than District funds) for information to the building principal and his/her approval.

4. Prohibited Student Body Expenditures

- a. Student body funds are funds of the student organizations of a school. Except as expressly authorized in paragraph 3.a above with respect to actual and necessary expenses for club or activity advisor(s) and chaperon(s), expenditures for gifts, loans, credit, or the purchase of accommodations for District employees or others are

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Business

Regulation #3350

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prohibited out of student body funds. These limitations are intended to prevent undue and improper pressure on an employee to the effect that his/her decisions might be influenced by gifts, etc.

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