

Staff Travel

1. District Travel

District travel procedures are applicable regardless of whether the source of funds is the general fund sub-funds, grants, capital projects or any other district fund. It is the intent of the district that, when travel is necessary, the employee may travel safely and comfortably, but not extravagantly. The employee will always consider cost when making lodging and rental car selections.

- a. Local Mileage Allowance: An employee may find it necessary to use his/her private vehicle to conduct district business. Such use should occur only with the knowledge and approval of the responsible administrator. The supervisor may approve individual trips or give blanket approval for local travel. Reimbursement for actual miles traveled on district business shall be calculated at the IRS rate.

(1) Limitations on Mileage Allowance

- (a) Local mileage allowance shall not be granted to an employee, for traveling from his/her residence to the place where work begins for the day or regular work place for returning home from the last place worked during the day.
- (b) Reimbursement will be made only for those miles actually traveled in connection with district business.
- (c) Because insurance costs are included as part of the mileage allowance, a traveler must complete and have on file with the district verifying personal liability coverage on his/her private passenger auto. Liability coverage must be equal to or greater than Oregon statutory limitations. Completion of the driver information form absolves the district of all liability, including, but not limited to, nonparticipation or uninsurability of the traveler. This form is available through the personnel office. Individuals not properly covered by automobile liability insurance are not authorized to drive private vehicles on district business.
- (d) A claim for travel and related expenses should be submitted at the end of each month in which reimbursement is to be claimed. A claim must be submitted within 90 days of incurring the expense to be honored for reimbursement.

(2) Itemized Travel Statement

- (a) The travel expense report form is used to report local mileage and related expenses. Local mileage is defined as miles driven within district boundaries on district business.
- (b) All travel must have the signature authorization of the principal or other responsible administrator.

- (c) The form must be signed by the claimant, approved for payment and distributed as indicated on the form.
- (d) Expense reports must indicate the nature of travel if destination is not a school.
- (e) Parking fees are reimbursable when necessary on official district business.

(3) Flat Rate Vehicle Allowance

- (a) The superintendent or designee may approve a flat rate for vehicle allowance if it is determined to be in the best interest of the district.
- (b) An employee may not claim reimbursement for local mileage while receiving a flat rate vehicle allowance considered as wages and included on the employee's W-2 form for tax purposes.

b. Meals and Meetings: Justifiable and reasonable expenses will be reimbursed when the meals are taken in connection with district business.

- (1) Expenditures for meals require the prior approval of the principal or other responsible administrator.
- (2) Full explanation of the purpose of the meeting and the identification of visitors or guests by name or group affiliation is required.
- (3) Receipts and an explanation for all meal expenses in excess of the allowance must be secured and attached to the claim.

2. Staff Development and Out-of-District

- a. Approval: All documents submitted must have the approval of the principal or other responsible administrator.
- b. Travel Plan: A travel plan must be completed and approved before any staff development activity or out-of-district travel can occur.

Trips out of district on a scheduled basis over a period of time (e.g., monthly association meetings, coach scouting opponent teams, etc.) must be approved.

- c. Travel Advance: A conference/workshop form report for out-of-district travel must be completed by indicating the estimated cost and must be properly approved. This form serves both as a travel advance request and a travel expense report.

- (1) When a cash advance is desired, the payment in advance section must be completed.
- (2) Cash advance may be made when the estimated cost for meals, mileage, etc., exceeds \$50.
- (3) The cost of travel tickets and lodging will not be included in a cash advance.
- (4) In case of loss, the traveler is personally responsible for cash advances issued for travel.
- (5) At least 15 working days are required for processing an advance check after the approved application is received by the disbursements department.
- (6) Only one cash advance can be outstanding to any employee at any time.
- (7) If a trip is canceled after an advance and/or tickets have not been used, the advance and tickets must be returned to the business office immediately.

d. Travel Accounting

- (1) Travel Expense: A travel expense report detailing actual expenditures or per diem reimbursement must be prepared and filed within 10 days of the conclusion of the trip.
 - (a) If the completed travel expense report totals less than the travel advance, the difference must be returned within 10 working days to the business office.
 - (b) On expenditures in excess of advance or where no advance has been requested, reimbursement will be made within 10 working days after the approved travel expense report is received in the business office.

- (2) Per Diem
 - (a) The primary basis for payment of travel related expense is per diem. Per diem is the daily amount allowed for meals, including all gratuities; therefore, employees are not separately reimbursed for gratuities or tips of any kind including, but not limited to, meals and transportation. Payment to individuals on travel status to cover meals is based on the rates published by the U.S. General Services Administration (GSA) for domestic travel in the continental U.S. for Alaska, Hawaii, and U.S. Territories and Possessions, the per diem is based on rates published by the U.S. Department of Defense. For international travel, the per diem is based on the rates published by the U.S. Department of State. (See www.gsa.gov/portal/category/100/20) Travel status is defined as travel outside the Portland Metropolitan Area. The per diem meal allowance is a fixed amount of reimbursement for a meal. It is not reimbursement for the actual cost incurred. Receipts are not required for meals if claiming per diem.
 - (b) When a personal vehicle is used between home and the airport, mileage for one round trip and economy parking will be reimbursed.
 - (c) Lodging shall be at reasonable commercial rates. If the cost is greater than \$125, inclusive of taxes and fees, a second approval is required from the site administrator's level supervision.
 - (d) Other expenses include toll charges and parking fees will be reimbursed if the length of trip or circumstances demands.
 - (e) Use of Local taxi, bus fares and vehicle rental.
 - (i) Rental automobiles should be used only when their use will result in savings or otherwise be more advantageous to the district, or when the use of other transportation is not feasible.
 - (ii) Traveler will rent an auto mobile that is the lowest cost to the district while suitable for their travel needs.
 - (iii) Rental cars should be used only for official travel or in lieu of taxi for necessary travel. Any additional costs incurred for other usage will be the responsibility of the traveler.

(3) Receipts and Supporting Documentation

- (a) All lodging expenses. A receipt for a shared room should be so indicated.
- (b) Receipts for meal expenses are not required when using per diem rates.
- (c) Registration, conference and workshop fees.
- (d) Vehicle rental.
 - (i) A copy of the rental agreement must be attached to the travel expense report.
 - (ii) The rental charge may be paid from the amount advanced.
 - (iii) Purchase of gas and oil which have been deducted from the rental charge by the rental agency must be included.
- (e) Expenses which consist primarily of the cost of furnishing meals for others in the course of conducting business on behalf of the district will be reimbursed upon submission of a travel expense report which includes:
 - (i) Names of guests;
 - (ii) Organizations involved;
 - (iii) Matters discussed;
 - (iv) Approval by the principal or other responsible administrator.
- (f) In the absence of a proper receipt, a signed affidavit attesting to the amount and the purpose of the expenditure may be accepted at the discretion of the business office.

e. Reservations

- (1) Commercial Carrier and Lodging: Travel should be conducted in the most expeditious and effective way. Economy, coach, tourist fare or other similar accommodations should be used for all travel. Lodging shall be at reasonable commercial rates. Advanced reservation discounts are expected to be utilized when available.
- (2) Canceled Trips
 - (a) If an employee cannot leave at the scheduled time, he/she must call the travel agency or carrier and arrange to have the tickets canceled or exchanged.
 - (b) Unused or canceled tickets must be returned to the business office. Refunds or claims will be applied for by the district and not by the employee.
 - (c) Commercial carrier reservation cancellations should be completed as soon as possible before departure time.
 - (d) Lodging reservations should be canceled by the employee as soon as possible to avoid a cancellation charge.

f. Vehicle Rental

- (1) Rental vehicles should be used only when such use will affect a savings or otherwise be more advantageous to the district or when the use of other transportation is not feasible.
 - (a) Any additional costs incurred for other usage will be the personal responsibility of the employee.
 - (b) The lowest possible rental rates are to be obtained. The vehicle type selected will be the least expensive consistent with intended use.
- (2) Insurance:
 - (a) An employee may elect to purchase additional insurance coverage offered through the rental agency agreement; in such cases, any accident causing collision loss could result in the employees' personal insurance being primary.
 - (b) District liability coverage extends to cover rental vehicles while in use by employees engaged in official district business only. District liability does not extend to personal use time of the vehicle.
 - (c) The business office must be notified immediately of any/all accidents occurring while the rental vehicle is in use on district business and while the traveler has extended the vehicle usage/agreement for personal use.

g. Travel by Personal Vehicle

- (1) Justification for using a personal vehicle for out-of-district travel shall be based on the following:
 - (a) When the destination is not conveniently accessible by commercial carrier;
 - (b) When various points must be visited and commercial carrier schedules are inconvenient;
 - (c) When carrying articles by commercial carrier would not be feasible;
 - (d) When use of a private vehicle is the least expensive travel option.
- (2) Reimbursement for travel shall be calculated at the current rate per mile.
- (3) If a route other than the shortest one is taken, an explanation must be made.
- (4) Convenience of Traveler
 - (a) Travel for the convenience of the traveler shall be at the traveler's expense.
 - (b) The amount allowed for mileage, additional meals and lodging is not to exceed the equivalent cost of round trip coach air fare and related expenses. Any extra costs must be paid by the traveler.
 - (c) Time away from work caused by traveling by less than the most expeditious means available must be charged to vacation or other appropriate leave.

(5) Insurance Coverage

Consistent with the procedures in 1c.

- h. District and Personal Travel: An employee who wishes to take vacation or other personal leave in conjunction with official travel may do so subject to the following conditions:
- (1) All time away from work caused by traveling by less than the most expeditious means available must be charged to vacation or other appropriate leave;
 - (2) If the employee travels for vacation purposes to a point that he/she would not have visited for business, he/she must pay the additional cost;
 - (3) All subsistence and transportation while on vacation status must be paid by the employee;
 - (4) No travel will be approved if the major consideration is to give the employee a personal vacation.
- i. Ineligible Expenses
- (1) Repairs, towing or service for personal vehicles.
 - (2) Mileage to more than one person if only one vehicle was used.
 - (3) Parking tickets or traffic fines.
 - (4) Personal expenditures for entertainment, alcoholic beverages, telephone, medicine and other such personal items.
 - (5) Expenses for spouse and family.
 - (6) Repair or replacement of personal items.
 - (7) Gifts.
 - (8) In-district meals without prior approval.
- j. Nondistrict Reimbursements: Reimbursement by other agencies or organizations for travel costs may be retained, provided such payment does not duplicate payment made by the district.