

INDEPENDENT SCHOOL DISTRICT 196  
Rosemount-Apple Valley-Eagan Public Schools  
*Educating our students to reach their full potential*

Series Number 405.8AR Adopted March 1979 Revised February 2020

Title Travel and Related Expenses

1. **Guidelines** – This regulation provides guidelines for District 196 employees and School Board members traveling at district expense to conferences, seminars, workshops and other appropriate, work-related meetings or events not involving the supervision of students. For regulations governing reimbursement of expenses when staff accompany students on school-sponsored trips or events, please refer to District Regulation 604.7.2AR (Overnight Field Trips) or District Regulation 604.1.1AR (Tournament Participation by Students).

It is understood that budgetary constraints may call for more restrictive guidelines.

2. **Definitions** – Travel and related expenses include the cost of transportation (by public carrier, private automobile, district-owned vehicles), meals, lodging and necessary incidental expenses incurred by district employees or board members while in attendance at or traveling to and from conferences, seminars and workshops or while engaged in other travel in accordance with district policy.
  - 2.1 Regional travel is defined as travel in the state of Minnesota, the four adjacent states (Wisconsin, Iowa, South Dakota and North Dakota) and the Chicago, Illinois, metropolitan area.
  - 2.2 Out-of-region travel is defined as travel in the continental United States and Canada that is outside of Minnesota, the four adjacent states and the Chicago metropolitan area.
3. **Mileage Reimbursement** – District employees and School Board members traveling in their personal vehicle on District 196 business may request reimbursement based on the Internal Revenue Service (IRS) standard mileage rate by completing the **Employee Mileage Form** located on the I-196 Employee Communications Network (<http://staff.district196.org>). The completed form must be printed and signed by the employee, authorized by the appropriate administrator and submitted to the Finance Department. The district will reimburse mileage in accordance with IRS Publication 463.
  - 3.1 Travel is reimbursable from the employee's regular job location to the employee's temporary work location and from the temporary work location to the employee's regular job location. An employee with two regular work locations may be reimbursed for travel between the work locations.
  - 3.2 Travel is *not* reimbursable from the employee's home to the employee's regular place of work, *even if* travel occurs multiple times daily or outside of regular work hours. Travel is reimbursable from the employee's home to a temporary work location and from the temporary work location to the employee's home, but only for the mileage in excess of the employee's usual mileage when commuting between home and the employee's regular work location.
  - 3.3 Mileage reimbursement requests must be submitted within 60 days after the travel event for which reimbursement is sought. Except in extraordinary circumstances, reimbursement amounts for requests submitted after the 60-day period will be treated as taxable income, subject to income and employment taxes per IRS guidelines.

4. **Expense Reimbursement** – District employees and School Board members may request reimbursement for expenses incurred while in attendance at or traveling to and from conferences, seminars and workshops, or while engaged in other travel in accordance with district policy.
  - 4.1 Expense reimbursements must be submitted on Procedure 405.8.3.2P, Employee Check Request and include original, itemized receipts. Credit card statements do not serve as sufficient documentation for reimbursement purposes as they do not provide the itemized details required for an effective review.
  - 4.2 Reimbursement requests for expenses must be submitted within 60 days after the expenses were paid or incurred. Except in extraordinary circumstances, reimbursement amounts for expenses submitted after the 60-day period will be treated as taxable income, subject to income and employment taxes per IRS guidelines.
5. **Regional and Out-of-Region Travel**
  - 5.1 Regional and out-of-region travel may be permitted, with supervisor approval, for district employees and School Board members under the following conditions:
    - 5.1.1 The purpose of the travel fits with district and/or school goals and/or curriculum;
    - 5.1.2 There is a sufficient balance in the appropriate budget to cover the expenses to be incurred;
    - 5.1.3 Consideration is given to the number of employees from that particular school and/or department and/or the district planning to attend the same event;
    - 5.1.4 If the travel involves at least one overnight stay outside the district, the travel request is submitted in writing to the employee’s supervisor (Procedure 405.8.4P, Request for Travel), and
    - 5.1.5 After the travel, the employee reports back to his or her supervisor and colleagues.
  - 5.2 The administrator approving attendance and travel is responsible for determining the reasonableness and necessity of the expense claimed within district policy and has the authority to disallow unreasonable or unnecessary expenses.
6. **Airline Travel**
  - 6.1 Airline tickets should be booked online or by the least expensive method, preferably using a district procurement card (PCard). The district provides for travel on coach class or tourist class only. Employees may not use a personal credit card to pay for airline tickets.
  - 6.2 In accordance with state law, frequent flyer miles and other airline travel credit resulting from district-paid airfare will accrue to the benefit of the district and may not be used for personal travel. If the airline will not honor a transfer or assignment of any credit or benefit, the employee must report receipt of the credit or benefit to the district within 90 days of receiving it.

**7. Personal Vehicle**

- 7.1 In some circumstances, use of a personal vehicle is preferable to travel by commercial air or some other commercial means (i.e., when the meeting is nearby or where travel arrangements are extremely difficult). Such travel will be reimbursed at the prevailing rate as referred to in section 3 above.
- 7.2 Transportation to and from conferences, seminars or workshops shall be selected on the basis of that which is as reasonable in cost as consistent with comfort, safety and convenience. If the cost of travel by personal vehicle exceeds the cost of coach air fare, the district will reimburse to the extent of the lesser amount.
- 7.3 If more than one person is attending an activity and transportation will be by personal vehicle, the individuals are encouraged to travel together.
- 7.4 It is permissible for employees or board members to take their own vehicle on a trip to enable them to use some vacation time; however, the same standard regarding reimbursement at the lesser amount, whether airline or private vehicle, will apply.

**8. Accommodations**

- 8.1 Individuals are expected to select accommodations, when they have an option, at the most reasonable rate. Lodging shall be selected on the basis of reasonable cost in conjunction with comfort, safety and convenience.
- 8.2 When an individual is traveling with a non-employee, the district will reimburse expenses for the employee only.
- 8.3 The district will reimburse expenses for overnight accommodations in the seven-county Twin Cities metropolitan area only if the employee or School Board member is working at the conference.
- 8.4 Original, itemized receipts are required for all accommodation claims.

**9. Meals Reimbursement**

- 9.1 The district will not use funds sourced from federal grants or awards for meal reimbursements.
- 9.2 The maximum reimbursement for meals per person, including the tax and tip, is as follows: \$50 per day, or for partial days \$10 for breakfast, \$15 for lunch and \$25 for dinner. The maximum reimbursement for tournament meals is \$15 as provided in Administrative Regulation 604.1.1AR, Tournament Participation by Students.
- 9.3 The district will not reimburse the cost of alcoholic beverages.
- 9.4 Reimbursement will be based upon actual expenditures; individuals must provide original, itemized receipts for meal expenditures.
- 9.5 The district will reimburse the cost of banquets or special functions related to an individual's responsibility or participated in by the general audience attending a particular conference, workshop or seminar. It is necessary to document these additional expenses.

## 10. **Other Costs**

- 10.1 The district will reimburse registration fees relating to conference, workshop or seminar attendance.
- 10.2 The district will not reimburse for entertainment or recreation costs that are either part of or separate from the conference, workshop or seminar.
- 10.3 Printed and audio publications which contain the proceedings or are supplementary to attendance at a given conference, workshop or seminar, and which are relevant to the employee's or board member's attendance at the conference, may be purchased with the approval of the appropriate supervisor.
- 10.4 The district will reimburse a reasonable cost of baggage handling when necessary.
- 10.5 Individuals are expected to select transportation at the conference, workshop or seminar, when they have an option, at the most reasonable rate. Transportation shall be selected on the basis of that which is as reasonable in cost as consistent with comfort, safety and convenience. Individuals are expected to use conference transportation (i.e., shuttle buses) whenever it is available.
- 10.6 Reimbursement for the use of rental cars by employees and board members is allowed only with prior approval by the superintendent or designee or, in the case of board members, by the board chairperson.
- 10.7 The district will not reimburse telephone calls for personal or family purposes. When reimbursement is requested for district-related calls, the party called must be noted on the receipt.
- 10.8 Exceptions to allowed travel expenses must be approved by the superintendent or designee for employees and by the board chairperson for board members.

## 11. **Travel and Related Expenses Involving Multiple District Staff** – When travel involves more than one district employee, each employee must separately account for their own individual expenses.

- 11.1 Employee Check Requests – Employee Check Requests (Procedure 405.8.3.2P) should not contain expenses for more than one employee. If reimbursement will be sought through this procedure, each employee must separately pay for their own individual expenses and submit their own Employee Check Request documenting such expenses.
- 11.2 PCards – PCards may not be used to pay for co-worker meals.

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**References:** -Minnesota Statute 15.435, Airline travel credit  
-Minnesota Statute 471.38, Claims  
-Minnesota Statute 471.665, Mileage allowance  
-Minnesota Statute 471.661, Out of state travel  
-Internal Revenue Service Publication 463, Travel, Entertainment, Gift and Car Expenses  
-Minnesota Department of Education General Assurances, section 2.C