

STAFF TRAVEL AND CONFERENCE GUIDELINES AND PROCEDURES

The following information is furnished in order to clarify the authorization for your attendance at an educational conference. It is also intended to assist you in submitting the appropriate claim for reimbursement ensuring prompt payment by the business office

BP 3350 - Board Policy and the California Education Code provide for the payment of actual and necessary business expenses for the district, including business travel. The terms “actual and necessary” should be interpreted for the district to mean the least cost accommodations that are safe and reasonable for the individual and the district. Cost beyond that which is incurred by personal or preferential choice of the individual will be the responsibility of the individual and not the district

Employees are expected to accept travel assignments as deemed necessary to meet the operations needs of the district, and to keep up with the new trends in education. Participation in the educational development work of professional organizations is encouraged and expected. In order to be approved, travel must be clearly necessary to the effective operation of the programs and service of Dinuba Unified School District.

1. Reasonable expenses, including registration fees and conference-connected meals, may be claimed for pre-authorized conferences and travel.

2. Reasonable hotel expenses may be claimed for pre-approved conferences when the situation merits accommodation and lodging is approved in advance. Reimbursement will be based on double occupancy (gender permitting). However, the district retains the discretion to approve a single occupancy request upon show of valid cause. (i.e. prescribed CPAP device, nursing mother, etc).

- In the instance that an employee chooses not to share a room with another employee of the same gender, they will be reimbursed up to 50% of the total room fee.
- If lodging is an option with the conference, but employee chooses to get a hotel room off site, the reimbursement amount will be up to the same dollar amount of the conference accommodations.
- Single occupancy accommodations will be provided for the Superintendent, Assistant Superintendent, and Elected Officials of the District.
- Accommodations provided through the last day of the conference. Attendees who choose to extend their stay once the conference has official ended, are free to do at their own expense.

3. Claims submitted for the daily cost of meals in connection with authorized attendance at activities may not exceed the board approved caps, currently \$10 (breakfast), \$12 (lunch), \$24 (dinner). Totaling \$46.00/day.

4. No public funds may be expended on the purchase of alcoholic beverages or tips.

5. Ground travel should be arranged so that the most number of staff members can be accommodated with the fewest number of vehicles.

6. Airline tickets should be of least cost, and shall not be arranged on a carrier solely to obtain points, free tickets, or any other amenities or gifts. Employees shall be required to account for gifts, "Frequent Flier" miles, gratuities, or other benefits received from private sources such as airlines, car rental agencies, and other public carriers as a result of travel paid for by the district.
7. Receipts for any expenditures, other than meals, are required for reimbursement.
8. All employees, when operating a privately/district owned vehicle on official district business, shall observe all applicable provisions of the California Vehicle Code (i.e., use of seat belts by driver and passengers, driving under the influence of alcohol/drugs, etc.).

Overnight Conference/Workshop and Out of State Travel

All overnight workshops and Out of State travel must be pre-approved by the Board of Trustees. For all out-of-state travel the Superintendent must approve the initial request before travel arrangements can be made. The request must go to the Board for final approval. District funds are not allowed to fund any student out-of-state travel expense. (Education Code 35330)

To begin this process, conference attendees must first complete the Travel Conference form and submit it to the principal or director for preliminary approval. The principal/director will then submit the request for board approval along with the following (3) requisitions:

- (1) Registration Fees (Requisition made to Conference) – include registration forms.
- (2) Hotel (Requisition made to American Express) - include hotel reservation confirmation print outs. **Attendees** – please make reservations on their personal card. Once the business office receives the PO, the payment information for your reservation will be switched over to the district credit card.
- (3) Estimated Reimbursement expenses for attendees (Requisition made to School Site Name).

All requisitions must list:

- Name of the conference or workshop.
- Where it is being held.
- Dates to be attended
- Name of the person or persons attending
- Any other information reflecting conference date(s), location, and subject matter.

If a prepayment or deposit is required, please state this on the requisition. Please allow enough time in your planning for travel and conference for required checks to be processed – minimum of 30 days. All conference registrations must have immediate supervisor's approval and, if categorically funded, the approval of the Director of Instructional Services.

After the conference registration has been processed by the business office, a green/goldenrod copy of the purchase order will be sent to your Site Secretary as confirmation.

Attendees of these conferences can submit for reimbursement of any reasonable expenses incurred as noted below. The most current guidelines, reimbursement rates, and requirements can be found on the DUSD Personal Expense Claim Form.

Conference or Workshops within Tri-County Area (Tulare, Kings, Fresno)

Conferences and Workshops within the Tri-County area do not require board approval. However a requisition for the conference/workshop must be submitted using the same time frame and guidelines listed above.

- *Meal reimbursement for conferences that do not include an overnight stay are considered taxable income by the IRS (publication 463). The district is required by law to report these reimbursements on your W2.*

Reimbursement of Travel Expense

Within 10 Business days of completing travel, a **Personal Expense Claim Form** signed by claimant and immediate supervisor, plus all receipts and/or proof of expenses (excluding meal receipts), must be submitted to the business office for processing. Documentation regarding conference schedule must be attached to the claim form in order to secure proper approvals.

Lodging

- In case of conference travel, reimbursable lodging costs shall not exceed the single occupancy rate offered by the hotel.
- Claimant must include an itemized folio from the hotel or motel which is received at check out. Claimant must review the folio for any errors at check out and should have them corrected before leaving. Claimant will be responsible to cover any unauthorized charges.

Mileage

- If you travel to and from the specified conference by private automobile, this distance claimed should be from your work site or your personal residence, whichever is closer, to the conference venue.
- If you share private automobile travel expenses with another authorized delegate to the same conference, arrangements should be made for only one travel claim to be submitted.
- If multiple authorized delegates attend the same conference but choose to travel separately, they may be compensated at the prorated mileage allowance. (See Example below)
- If a district director coordinates travel for a large group, he/she will also coordinate carpools and establish reimbursement options.

Number of authorized Delegates	Mileage Reimbursement Allowance
1	100 %
2	50 % Each
3	33% Each
4	25% Each

Meals

- The Cost of meals shall be reimbursed at the current Board approved rates:
 Breakfast - \$10.00
 Lunch - \$12.00
 Dinner - \$24.00
- Reimbursements will not be made for tips, guests, or alcoholic beverages or when costs of meal(s) are included in workshop fee or airfare, the total per diem allowance is reduced for each meal included according to the rates shown above:

When Travel Begins

Prior to	&	Ends After	These Meals May Be Claimed
6:30 A.M.		9:00 A.M.	Breakfast
6:30 A.M.		2:00 P.M.	Breakfast & Lunch
11:00 A.M.		2:00 P.M.	Lunch
11:00 A.M.		7:00 P.M.	Lunch & Dinner
5:00 P.M.		7:00 P.M.	Dinner
6:30 A.M.		7:00 P.M.	Breakfast/Lunch/Dinner

- Consultants (i.e. TCOE Consultants) who travel with district teams or individuals are not eligible for Per Diem Meal reimbursements, but will be reimbursed for necessary meals upon submission of receipts. (updated 2.21.18)

AP by the Sea Conference Guidelines

Conference Registration Changes

Official AP by the Sea Cancellation Policy:

- Full refund of money paid will be made if written cancellation is received by AP* by the Sea 30 days before the session you are attending.
- Cancellation 8-30 days prior is subject to a \$100 cancellation fee and all unrecoverable costs.
- *Cancellation 7 days prior subject to 50% cancellation fee.*
- NO refund for no-shows.

Session Dates	All changes for this session must be completed by
Session #1 – 6/20 – 6/23/17	6/1/17
Session #2 – 7/10 – 7/13/17	6/20/17
Session #3 – 7/24 – 7/27/17	6/30/17

If an attendee is unable to attend, they must notify the District Office immediately. If attendee has chosen hotel accommodations, it is the attendee's responsibility to cancel those reservations.

If attendee is requesting to change sessions, they must personally contact AP by the Sea to coordinate that change. If attendee is using hotel accommodations, it is the attendee's responsibility to change the hotel reservations as well.

Reimbursements

Hotel

AP by the Sea offers housing for attendees as follows: \$460.00 for on campus apartments, which includes all breakfasts, lunches, and Sunday dinner.

Attendees may opt not to utilize campus apartments and instead arrange for hotel accommodations. In such case, they will be responsible for making reservations and paying for the hotel on their personal credit card. Upon return from the conference, the attendee will be reimbursed **up to** the costs of the available on campus apartments (\$460.00). In choosing this option, reimbursement for 2 breakfasts and Sunday dinner is forfeited as they are included with on campus housing. If the hotel cost is less than \$460.00, the actual cost incurred is reimbursed.

Within 10 Business days of completing travel, a **Personal Expense Claim Form** signed by claimant and immediate supervisor, plus all receipts and/or proof of expenses (excluding meal receipts), must be submitted to the business office for processing. Documentation regarding conference schedule must be attached to the claim form in order to secure proper approvals.

- Claimant must include an itemized folio from the hotel or motel, provided at check out.

Meals

Following are the schedules for reimbursable meals:

Session #1–6/20-6/23		Hotel Option			On Campus Housing		
Day		Breakfast	Lunch	Dinner	Breakfast	Lunch	Dinner
1	Monday (travel day)	0	0	0	0	0	Included
2	Tuesday	Included	Included	24	Included	Included	24
3	Wednesday	0	Included	24	Included	Included	24
4	Thursday	0	Included	24	Included	Included	24
5	Friday	Included	Included	24	Included	Included	24
Reimbursement Totals				96	96		

Session #2 & #3		Hotel Option			On Campus Housing		
Day		Breakfast	Lunch	Dinner	Breakfast	Lunch	Dinner
1	Sunday (travel day)	0	0	0	0	0	Included
2	Monday	Included	Included	24	Included	Included	24
3	Tuesday	0	Included	24	Included	Included	24
4	Wednesday	0	Included	24	Included	Included	24
5	Thursday	Included	Included	24	Included	Included	24
Reimbursement Totals				96	96		

Mileage

- If you travel to and from the specified conference by private automobile, the distance claimed should be from your work site or your personal residence, whichever is closer, to the conference venue. (Please attach a Google Map)
- If you share private automobile travel expenses with another authorized delegate to the same conference, arrangements should be made for only one travel claim to be submitted.
- If multiple authorized delegates attend the same conference but choose to travel separately, they may be compensated at the prorated mileage allowance. (See Example below)
- If a district director coordinates travel for a large group, he/she will also coordinate carpools and clarify reimbursement expectations.

Number of Authorized Delegates	Mileage Reimbursement Allowance
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