

Travel Request Packet Instructions

Please keep in mind the following information for the Conference Travel Request Form – Rachel will be able to assist with this:

- Name of the Conference
- Location and Dates of the Conference
- Who will be attending?
- Transportation – Please indicate whether you will be flying, driving your own vehicle, or if you would like to use a district vehicle. If you are driving your own vehicle, kindly provide a copy of the directions from the District Office to your destination.
- Which budget will be utilized?
- What is the registration fee, and do they accept purchase orders? If purchase orders are accepted, you will need to register yourself and choose payment by purchase order.
- A copy of the Conference information is required, stating the registration cost, hotel cost, any parking costs, as well as the Conference agenda/itinerary.
- For hotel bookings, you will need to reserve your room at the conference rate or special government rate. Two employees of the same gender are required to share a room. Please send the hotel confirmation, and the district will prepay the reservation.
- Parking Charges: Please provide information on any parking fees at the hotel or conference.
- Per Diems – If the Conference includes breakfast, lunch, and/or dinner, you cannot claim these meals. Please refer to the attached AR 3350 for the meals you can claim and the timeframes.
- Substitute Costs – Indicate if you will require a substitute or not. General Ed is \$170 per day and Special Ed is \$210 per day.
- Out of State Travel – Requires Board Approval before any bookings can be made.

LOMPOC UNIFIED SCHOOL DISTRICT Conference Request Travel Form – Required Prior to Travel

Note: This form approves funding and funding source only. It does not guarantee substitutes.
Please call in absence and send the School Business Release Time Request form at the time this form is submitted for approval.

PLAN IN ADVANCE

1. All travel must:
 - a. Specifically focus on meeting goals in the Single School Plan for Student Achievement (SPSA), Local Control Accountability Plan (LCAP), or grant requirements
 - b. Demonstrate potential of benefit for site or District
2. This form and Trip Request Form must accompany the request for reimbursement.
3. All out of county and/or state travel must be **pre-approved** by the Site Principal/Supervisor, District Director and Department Assistant Superintendent via this form. Superintendent approves travel for Principals and Assistant Superintendents via this form.
4. Out of state travel requires Board approval. Please allow 3-4 weeks for processing.

FILL OUT BLANK SECTIONS BELOW

Name of Conference:			
Conference Location:		Date:	
Closer Alternative Conference:			
Location:		Date:	
Attendees:			
School/Department:			
Trip Request #			

SCHOOL/SITE/LOCAL CONTROL ACCOUNTABILITY PLAN REFERENCE

Page#		Goal#		Action:	
Budget:					

TOTAL BUDGET COST (MUST BE COMPLETED) NOTE: Please attach Board Policy (BP 3350 and AR 3350)

#	Item	\$	\$	Description
1	Registration	\$		Conference registration
2	Lodging	\$		Hotel charges at State/Government Rate or lowest available rate
3	Parking	\$		Self-parking – Valet parking requires pre-approval
4	Transportation	\$		District vehicle (complete Trip Request Form for approval)
5	Airfare	\$		
6	Mileage	\$		Check IRS Standard Mileage Rate - click HERE
7	Per Diem	\$		Breakfast \$17; Lunch \$18; Dinner \$34 (Click here to see AR 3350)
8	Substitute	\$		
9	Other	\$		
TOTAL		\$	0.00	

NOTE: Attach copy of conference registration overview, intent and specifics. Attach a narrative regarding any item above if needed for clarification.

SIGNATURES APPROVED DENIED

Principal or Supervisor	Date _____	<input type="checkbox"/>	<input type="checkbox"/>
District Director/Program Coordinator	Date _____	<input type="checkbox"/>	<input type="checkbox"/>
Assistant Superintendent	Date _____	<input type="checkbox"/>	<input type="checkbox"/>
Superintendent - Principals & Assistant Superintendents only	Date _____	<input type="checkbox"/>	<input type="checkbox"/>

Trip Request

Requesting School: _____

Activity: _____

BUDGET:

Pick Up Location & Address:

Destination Location & Address:

Dropoff Location & Address:

Start Date & Time:

End Date & Time:

Number of Students: _____

Total Number of Passengers: _____

of Wheelchairs: _____

Trip Supervisor: _____

Email: _____

Preferred Vehicles:

- Bus
- Van
- Truck
- Expedition
- Personal Vehicle
- Walk

****Any Special instructions or notes must be attached to the request****

Estimated Expenses Additional Information

Requesting School/Org
 Activity

Bill To
 Trip for Competitive Event? Y N

Stop Type	Location	Address	City	State	Zip	MapSource
Pickup			Lompoc	California	93436	Google
Destination			Lompoc	California	93436	*
Dropoff			Lompoc	California	93436	*

+ Add Additional Stop Intermediate Stops

#	Stop Type	Destination	Address	City	State	Zip	Delete
				Lompoc	California	93436	X

Start Date Time End Date Time

Overnight Trip Y N Trip on Approved List? Yes No

of Male Students # of Female Students

of Students # of Adults

Total No. of Passengers Preferred Vehicles

Driver(s) furnished by Transportation? Y N # of Drivers

Vehicle(s) furnished by Transportation? Y N # of Vehicles

Requestor April Martin Trip Supervisor

Trip Supervisor's Email (max 512 characters) Trip Supervisor's Phone

of Wheel Chairs 0 Special Instructions

of Car Seats 0

Comments

Override Key

- Need destination
- Date – with start and end time
- Main point of contact with phone number and email
- Number of chaperones (district expects 15:1 for chaperones)
- Number of students attending
- How is it being paid (budget)
 - If we need to invoice and be reimbursed from an entity, such as a museum trip, please provide all contact information
- What type of vehicle are you requesting (van, school bus, personal vehicle, charter bus, walking)
 - If using personal vehicle, then need Driver License number and insurance carrier
- If overnight, all chaperones need to be fingerprinted through Classified HR
- If there are any special directions, please let it be known so these can be added in comments right away

Business and Noninstructional Operations

Travel Expenses

1. Purpose

The Board authorizes the reimbursement of actual and necessary expenses incurred for workshops, conferences, and other job related professional or community activities whose purposes support the improvement of the educational program of the school. While membership in such organizations and participation in their regular activities are the responsibilities of those who elect to engage in them, the Board supports employees participation in the granting of leave, paying certain expenses, and providing transportation within the limitations of budget provisions.

Expenses shall be reimbursed within limits approved by the Board. The Superintendent or designee shall establish procedures for the submission and verification of expense claims. He/she may authorize an advance of funds to cover necessary expenses.

The Board may establish an allowance on either a mileage or monthly basis to reimburse authorized employees for the use of their own vehicles in the performance of assigned duties.

2. Superintendent's Authority

All requests involving travel or expenses require the advance approval of the immediate management supervisor. Approval will be made within the framework of this policy, except that the superintendent or designee reserves the right to make such exceptions as deemed to be appropriate when special events may occur. The limitations of this policy do not apply to specified administrative personnel assigned to represent the District under a variety of circumstances relating to the course of their employment and the performance of their responsibilities. (cf. 4131/4231/4331 - Staff Development)

Authorized employees may use district credit cards while attending to district business. Under no circumstances may personal expenses be charged on district credit cards. (cf. 9240 - Board Development) (cf. 9250 - Remuneration, Reimbursement, and Other Benefits)

Business and Noninstructional Operations

Travel Expenses (continued)

3. Professional Activities

The District limits its support, in the form of leave, expenses, or transportation, for professional participation to those activities which relate directly to the educational program of the school and to personnel representing the District and limits employee participation to area of employment classification unless it is to the District's advantage to lift such limitation.

Legal Reference:

CALIFORNIA EDUCATION CODE

44016	Travel expense
44032	Travel expense payment
44033	Automobile allowance
44802	Student teacher's travel expense

Business and Non-Instructional Operations

Travel Expenses

REIMBURSEMENT PROCEDURES

The following instructions must be followed when submitting claims for reimbursement for in-state and out-of-state travel and other incurred expenses:

1. All claims must be submitted on district approved forms with original signatures on all pages (Forms can be found on the LUSD.org website).
2. All claims must be by employee, have a valid budget account number, and have copies of the fully signed trip request and travel form attached. Only expenses incurred as representatives of the school district are payable. **AN EMPLOYEE CAN BE REIMBURSED ONLY FOR HIS/HER OWN EXPENSES.**
3. All out-of-state travel must be pre-approved by the Board of Trustees. The Superintendent must approve the initial request before travel arrangements can be made. Conference attendees must initiate this process by completing a Request for Travel form and submit it to their principal or director for preliminary approval.
4. State mode of transportation - railroad, bus, airplane or personal automobile. List amount of fare separately. Travel vouchers/receipts must be submitted in case of private carrier.

Mileage reimbursement – The district has purchased a number of vehicles for the purpose of district travel. These vehicles represent the most efficient option for travel. Use of personal vehicle for travel is discouraged.

Car mileage is reimbursed at the current Internal Revenue Service (IRS) standard mileage rate or as specified in personnel contracts. Travel is computed from and to the school district as starting and completion point. An exception to this rule occurs when an employee begins/completes travel from a point other than the district, and the mileage to/from this other point is less than the mileage to/from the district. In instances such as these, the mileage will be computed as the lesser of the district or the other starting/ending point. If a personal vehicle is used, the travel expense approved will be no greater than the expense that would have been incurred if it had been by airplane. Exceptions to this require prior approval of the immediate management supervisor.

5. Hotel - when traveling on school district business, with proper school district identification, hotels may grant a special government/state rate. Employees shall request the state government hotel rate or lowest rate available, whether it is the state government rate or any other available rate. Exceptions to the state rate or the lowest rate available must be pre-approved by the Superintendent.

Business and Non-Instructional Operations

Travel Expenses (continued)

When possible, two employees (gender permitting) shall share a room. The employee who incurs the expense for the District travel may submit to be reimbursed with detailed proof of payment. Reimbursement will be based on double occupancy (gender permitting). Employees cannot be required to share a room with their Supervisor/Manager. The district retains the discretion to approve a single occupancy request upon show of valid cause.

If a room is occupied by a district employee and guest/spouse, the reimbursement is linked to the full nightly rate. If the hotel charges for an additional adult/guest per night, the employee will absorb the extra nightly fees and charges.

TRAVEL ADVANCE

The Superintendent or designee must approve all advances for travel expenses. An advance must not to exceed \$75/day for meals, tolls, and short-term parking of one hour or less in lieu of other procedures and limits established here within. Other per diem rates may be established by the Board in individual employment contracts. Only appropriate expenses below \$75 per diem are reimbursed.

CLAIM FORMS

1. Claims shall be submitted within two weeks after completion of the trip. If claims are not submitted with in this timeline, the District may decline any and all of the employees reimbursement expenses. To be in compliance with General Acceptable Accounting Principles (GAAP) expenses are to be reported in the period expenses are incurred; therefore the district will decline late claims that are submitted after books are closed (July 31st).
 - a. All Travel Reimbursement claims must include the following items:
 - Fully completed Request for Travel Form
 - Fully completed Trip Request Form
 - Detailed schedule/agenda of conference attended
 - Valid Budget Code
 - Meals at the per diem rate, in accordance to policy. Receipts for meals are not required.
 - Google Maps if claiming mileage
 - All required signatures

Business and Non-Instructional OperationsTravel Expenses (continued)

2. **Meals** - Reasonable expenditures are allowed for meals. No public funds may be expended on the purchase of alcoholic beverages. Meals will be reimbursed up to the current board approved rates not to exceed (except as provided for in individual employee contracts):

\$17 Breakfast
 \$18 Lunch
\$34 Dinner
 \$69 Maximum Full Day

With prior approval from the Superintendent and based on special circumstances and locality, meals may be reimbursed at a higher rate. The rates are based on the U.S. general Services Administration (GSA) for Meals and Incidental Expenses (M&IE) for Santa Barbara County. Rates will be reviewed annually and based on GSA rates.

If any meals are included in the pre-paid conference registration fees and the employee chooses to eat elsewhere that meal cost will not be reimbursed.

Employees may claim meals (as noted above), based on the following timeframes:

Breakfast: Trip begins at or before 6:30 a.m. and ends at or after 9:00 a.m.
 Lunch: Trip begins at or before 11:00 a.m. and ends at or after 2:00 p.m.
 Dinner: Trip begins at or before 5:00 p.m. and ends at or after 7:00 p.m.

If expenses are to be paid for informal meetings, including but not limited to luncheon meetings between the Superintendent and an administrator, or a District board member or a member of the community, the Superintendent or designee is authorized to determine in advance whether or not such expenditures promotes District business and whether or not as a matter of policy such expenses can be incurred

3. Signed, itemized receipts by the LUSD claimant are required for all of the following expenses:
- a. Taxi - list separately and indicate points of travel
 - b. Registration, dues, or any other incurred expenses must be substantiated
 - c. Car rental – when a choice of rental service is available, the most economical car rental is required.
 - d. Hotel charges - list separately and support by hotel voucher/receipt. Hotel charges must be at State Rate or lowest available rate, unless pre-approved by the Superintendent or designee.

Business and Non-Instructional Operations

Travel Expenses (continued)

- e. Parking - actual self-parking expenses are reimbursed; valet parking, while not usually approved, must be pre-approved and a written explanation is required for the extenuating circumstance.
- 4. Mileage reimbursement – The district has purchased a number of vehicles for the purpose of district travel. These vehicles represent the most efficient option for travel. Use of personal vehicle for travel is discouraged.
- 5. Gratuities - other than for normal tips for taxis, bellboys, maids (for extended stays), baggage handling, and meals, gratuities are not authorized. If gratuities of an unusual amount or nature are required for a major meeting, convention, etc., they must be approved in advance and detailed on the individual travel expense report.
- 6. Travel expenses for a guest/spouse are not reimbursable.
- 7. The Superintendent or designee shall in advance determine if any employee shall be reimbursed for expenses incurred in attending local civic organization functions to the extent that such expenses are incurred in the course of performing services for the school district.
- 8. Group travel (e.g. groups of 3 or more) shall be managed by the administrator leading the trip. Travel pre-approval forms are required for each LUSD employee participating on the trip, and the administrator shall coordinate event registration, transportation, hotel accommodations and shall be accountable for the pre- approved expenses.