



CONFERENCE AND TRAVEL GUIDELINES

All employees are reminded that our organization is a public entity. All conferences and travel are funded through taxpayer dollars that are intended to support student outcomes. As such, *all expenditures must be economical and modest.*

General Information:

- All conference attendance and related travel must be in the interest of the District and in accordance with the adopted budget.
- All conferences and travel require Cabinet/Superintendent approval.
- Conference and travel expenses to destinations more than 50 or more miles from LUSD and/or at a cost of more than \$200 require prior Board approval.
- A requisition is required for all conferences and travel that have any costs.
- The Conference Expense Claim Form along with itinerary must be submitted within 30 days of completion of travel, with Administrator signatures. All fields are to be completed. ***Incomplete and inaccurate forms will be returned*** and will delay the reimbursement process. Forms submitted after the 30 day timeline may be rejected.
- Conference reimbursement is allowed for employees only. Expenses related to family members, friends, or partners are not allowable.

Meal Allowance and Reimbursement:

Meals shall be paid at the per diem rate when the traveler is in "travel status". An employee is considered in travel status when they are traveling on behalf of the District, more than 50 miles one way (most direct route) from either their workstation or personal residence. Per diem is paid at the prevailing General Services Administration (GSA) standard rate (*published online at www.gsa.gov/perdiem*) in accordance with the following:

- Meals will be reimbursed only if they were not included as part of the conference. If claiming meals, a conference agenda reflecting no meals offered at the conference ***must be*** attached or an emailed link must be provided to the agenda. For example, if a conference offers a buffet breakfast in the morning as part of the event, if a separate breakfast is purchased by the employee, this will not be approved for reimbursement.
- The daily meal allowance is defined by the GSA standard rate for the geographic region of the conference (see website linked above).
- The allowance for same-day travel of more than 6 hours is for two meals only.
- No meal allowance is provided for travel of less than 6 hours.
- Alcoholic beverages will not be reimbursed.
- Additional gratuities, delivery fees, or room services charges beyond the total daily GSA standard rate will not be reimbursed.

Board Approval: September 15, 2023

See also Board Policy and Administrative Regulation 3350, adopted on September 15, 2023



Lodging

Lodging expenses will be reimbursed when overnight travel is required at a location in excess of 50 miles from the personal residence of the employee. Reimbursement must be in accordance with the following:

- Lodging shall be booked by the employee and every effort should be made to align lodging costs with the prevailing General Service Administration (GSA) rates, published online at www.gsa.gov/perdiem. Economical hotels are encouraged. Luxury hotels and resorts with rates higher than the GSA published rates are strongly discouraged.
- Lodging may be only for the minimum required number of days. Room costs before the conference begins or after the conference ends must be paid by the employee.
- Rooms should be booked with a government reduced rate, if available.
- Room rate, taxes, and related fees, such as parking, are reimbursable.
- Optional and incidental expenses, such as movie rentals and laundry services, are not reimbursable.
- Employees must be prepared to present a personal credit card for room incidentals upon checking into the hotel.
- Any room service meal charges must be applied to an employee's own payment method and must adhere to the meal reimbursement requirements noted above.
- The Hotel/Motel Transient Occupancy Tax Waiver form should be presented at the time of registration or reservation, if prepaid.
- If deemed necessary, the employees with authority to arrange travel are:
 - Administrative Office Coordinator, Superintendent's Office
 - Administrative Assistant, Educational Services
 - Administrative Assistant, Business Services

Travel

The mode of travel used (i.e. airplanes, trains, buses, etc.) should always be the most economical and efficient means of transportation.

Mileage

- When using their own vehicle, employees will be reimbursed per mile based on the [IRS business mileage rate](#) at the time of travel.

Board Approval: September 15, 2023

See also Board Policy and Administrative Regulation 3350, adopted on September 15, 2023



- Mileage claims covering one month shall be submitted through the claimant's supervisor to the Accounting Dept. within the first five days of the month.
- Claims must be held by the employee until the amount exceeds \$10.00.
- Documentation that verifies miles traveled must be provided. Acceptable documents are online maps (i.e., Google Maps) which indicate both a starting location and ending location, with mileage indicated. The shortest possible route must be taken.
- Employees may not claim reimbursement for automobile usage from their residence to the work site during regular assigned work hours.
- Reimbursements of mileage are for authorized use of a personal automobile with a valid driver's license on official school business.
- District vehicle use is exempt from mileage reimbursement.
- Reimbursable mileage occurs when:
 - Travel originates from the employee's work location. All miles traveled from the employee's site to and from other locations on work assignment are reimbursable.
 - Work-related travel occurs on weekends and holidays.
- Employees claiming for travel on a Board Approved Conference must use the Conference Expense Claim form for mileage.
- Mileage for meetings without additional costs (i.e. no registration fees or meals) should be reported on the Mileage Claim Form.

Airfare

- Employees will secure their own airfare and it must be secured at the lowest cost option available with reasonable travel times.
- The District may secure airfare for an employee under special circumstances. It will also be secured at the lowest cost option available with reasonable travel times. The employees with authority to arrange travel are noted above.
- First and Business class rates or other fare upgrades are not allowable.
- Checked bag fees are allowable only for travel lasting three days or longer.
- Parking at airports should be at the lowest cost option.
- Airport shuttles from the traveler's home to the airport should be considered when the cost is lower than combined parking and mileage cost.
- Airfare is only allowable for destinations more than 250 miles from Lynwood or when the cost would be more affordable to drive.

Board Approval: September 15, 2023

See also Board Policy and Administrative Regulation 3350, adopted on September 15, 2023



Shuttles, Rideshares, Taxis, and Rental Cars

- When selecting supplemental transportation (i.e. shuttles, rideshare companies, taxis, and rental cars), the lowest price option must be used.
- For instance, if travel is expected only to and from the airport and the primary destination (hotel or meeting venue), and there is only one traveler, an airport shuttle will likely be the lowest price option. When there are multiple travelers, rideshares or taxis may be the lowest price option. If travel is required from the primary destination (multiple meeting venues), then a rental car may be the lowest price option.
- Rental cars are only an option with advance board approval. Rentals must be modest and affordable. Luxury or exotic rentals are not allowable.
- If needed, the District will secure rental cars and select the most economical option. The employees with authority to arrange travel are noted above.
- All travel submitted for reimbursement must have a direct connection to the conference.
- Gratuities are not allowable expenses.

Receipts

- For meals, receipts are not required. The employee may claim the appropriate rate as noted in the “Meals” section of this document. By claiming this rate, the employee confirms that he/she did not purchase alcohol or unallowable items.
- Receipts submitted for other allowable costs must show a date, time, and the details of the items purchased.
- Receipts for items beyond lodging and travel will not be reimbursed.
- Original receipts are required.
- Shared receipts are discouraged.
- Receipts must be signed and dated by the employee to confirm they are adhering to District guidelines, policies, and regulations.

Claim Form Requirements

Conference Expense Claim Forms, with proper authorizing signatures, must be submitted to Accounting within 30 days of the completion of travel.

The following information must be provided on the Conference Expense Claim Form:

- Claimant’s name and contact information

Board Approval: September 15, 2023

See also Board Policy and Administrative Regulation 3350, adopted on September 15, 2023



- Requisition number
- Conference or meeting title, location, dates, and times
- Type of traveler
- Board approval date
- Details of costs incurred each date of travel (see Receipts section above)
- Claimant's signature and date of signature
- School or Department name
- Account number (complete account string). This account number indicates where the costs are to be charged and should correspond to the account number used in the requisition.
- Administrator/principal approval signature
- Program administrator approval signature for all restricted programs
- Board Approval for conferences and travel expenses to destinations that are 50 or more miles away **and/or** \$200 or greater.
- Please make a copy of the completed form and all supporting documents before submitting to the District Office.