



Sherri Mathews-Hazel, CPA
Chief Financial Officer

TO: Administrators, Supervisors,
Bookkeepers and Secretaries

THRU: Todd A. Walker, J.D., Ph.D. 
Superintendent

FROM: Sherri Mathews-Hazel, CPA 
Chief Financial Officer

Ciera Bing 
Budget Director

RE: Travel Guidelines for Employees

DATE: September 3, 2025

This memo is effective as of the date above for 2025-2026 school year.

There are limited travel funds available in this FY 2026 budget. Due to budgetary reasons, travel funded by the general fund will be significantly reduced. It is important to note that if the professional development is funded by grants, these restrictions may not apply.

School-based and district level supervisors and administrators should limit travel to one national conference and one State conference (South Carolina, North Carolina, and Georgia). Additional job-related meetings must be approved by the appropriate supervisor.

Teachers and other employees should limit travel to no more than three days per semester or five days per school year.

Considering these changes, be mindful that approval for FY 25-26 professional development requests funded by the general fund should only be approved if they are directly related to new mandates or regulations that impact the employee's job responsibilities. Only one person per location may attend a meeting/conference/training unless specified by a grant or program requirement. This measure is necessary to ensure that we allocate our limited resources effectively.

Please see the travel guidelines below that will be in effect until June 30, 2026:

1. Staff travel should be submitted on the Request to Attend Form at least 30 days prior to departure for local travel and 60 days prior to departure for out-of-state travel.

2. Only one person per location may attend a meeting/conference/training unless specified by a grant or program requirement. Exceptions should be approved by an Executive Team Level Administrator.

3. The Request to Attend Form should be completed according to the Travel Advance Checklist. The following documents should be attached before supervisors' approval:

- a. Supporting Expense Documentation
- b. Conference or Meeting Agenda
- c. Justification form (see attached)

4. The Request to Attend Form must have the following approvals in this order: **direct supervisor→ grant director (if applicable)→ executive director→ chief level→ budget services→Superintendent.**

Please note: *Budget services will approve funds available before the Superintendent's approval. Superintendent's approval is required before making travel arrangements such as airline reservations, registrations, etc.*

5. The Superintendent's office will then forward the Request to Attend Form to accounts payable in Financial Services for processing and pre-payments upon approval.

Please note: *An employee that travels within the state of South Carolina, North Carolina, and Georgia for less than \$500 will not require the approval of the Superintendent. It may be sent directly to Budget Services and Budget Services will send to Financial Services for processing. All employees must complete the Request to Attend form for travel that equals no cost. No cost Request to Attend forms must be approved by the supervisor only and filed with supervisor.*

Travel reminders:

1. A purchase order is required before Forest Lake and Kingston Bay travel agency can be used. Employees may also use travel websites such as Expedia and Travelocity to purchase tickets with their personal credit cards. The receipt will be needed for reimbursement.
 - a. The District will only pay for coach fare if available, at the time of reservation. If the employee is driving to the destination, mileage reimbursement cannot exceed a coach ticket amount.
2. Rental vehicles may be authorized when other means of travel cannot be used economically. Prior approval from supervisor is required so be sure to include it on your Request to Attend form.
3. Lodging must be at a commercial establishment and the employee is required to reserve accommodation at the lowest available single rate if available. An estimate should be attached to the RTA. **Please note:** *Traveler is responsible for room reservation.*
4. All expenses need to be included on the Request to Attend Form even if included by purchase order. Examples of other expenses are registration, airline baggage, internet, taxi or shuttle services, etc.
5. Please see attached the detailed travel advance checklist for more detailed information.
6. Registration invoice must be attached to the RTA if pre-payment is required.

Reimbursements:

1. Reimbursement request should be submitted within 10 days after travel.
2. Attach a copy of your advanced check and Request to Attend with approved signatures.
3. Provide a "0" balance hotel receipt as well as a receipt for incidental such as parking, Uber/taxi, baggage, etc.
4. Reimbursements should be submitted via email following approvals in this order: **direct supervisor** → **grant director (if applicable)**. Once approval signatures are received, hard copies will go through district mail to Financial Services.

Please share travel guidelines with your staff. The travel justification form and travel reminders are attached for your use. If you have any questions, please call Financial Services on 803-231-7515.

Attachments:

Travel Reminders (Attachment A)

Travel Justification (Attachment B)

Checklist for Completing Request to Travel (Attachment C)

Checklist for Travel Reimbursement (Attachment D)

TRAVEL REMINDERS

MILEAGE PER DIEM: \$.70 as of July 1, 2025

MEAL PER DIEM: \$35.00 per day in-state
\$50.00 per day out-of-state

Departures after 12:00 noon=1/2 day rate
Arrivals before 12:00 noon=1/2-day rate

TRAVEL APPROVAL: The Request to Attend must have direct supervisor, appropriate executive director, chief level approval, budget services, and Superintendent's approval before making arrangements. Do not incur expenses before all required approvals are obtained. Allow at least 30 days prior to departure for local travel and 60 days prior to departure for airline travel. (Refer to A/P Check Run Schedule)

REQUEST TO ATTEND FORMS: Must be completed prior to attending conferences and workshops. Employee can pay all approved expenses and request reimbursement after activity or request district payments in advance as follows:

Vendor Prepayments should be indicated by placing an * next to the line item you need prepaid and attaching the required prepay documents.

___Registration: Attach *completed* registration form, which shows amount due and mailing instructions. Do not request payments for memberships; conference registration fees only.

___Airline Travel: Shop for best travel agency rate.
If you are using Forest Lakes or Kingston Bay,
a Purchase Order is required. Procurement Services must have a copy of
the RTA with all required signatures before a purchase order is issued.
Or pay with a personal credit card when using any other travel websites.
Do not authorize travel agents to issue tickets until you have cabinet level approval.

___Lodging: When making your hotel reservations, you should secure your reservation on your credit card or (only if needed and requested directly). Request a pre-pay deposit for one night's lodging if required.
For deposit prepayment, provide hotel confirmation form or separate document with your name, hotel name, address and confirmation #.

Employee Advances – An employee can request a travel advance covering 75% of expenses not already prepaid.
To request an advance check, circle *yes* at bottom of form.
The remaining 25% will be paid when you submit your Travel Reimbursement form, along with the required receipts.

TRAVEL REIMBURSEMENT REQUEST: If you have requested travel prepayments and /or an employee travel advance, you ***must*** file this form within 10 workdays of your return. Remember to...

___List time of departure and return (AM or PM)

___Attach your *original, itemized* hotel bill showing charges and payment in full. On-line payment verification required

___Obtain receipts for airline baggage and other misc. airline charges

___ Attach your original receipts for rental car, parking and ground transportation expenses.

___Travel Reimbursement forms must also be approved by the appropriate supervisory / budgetary person.

STUDENT TRAVEL/MEALS: Expenses for traveling student meal purchases can be submitted on Expenditure Request form. Designated employee will be responsible for purchases and meal receipts.

INQUIRIES: *Caroline Smith, Supervisor* *231-7525* *Dept. 750*

TRAVEL JUSTIFICATION

1. How many staff members from your school or department are attending the conference? What is the justification for more than two staff attending?

2. What is the purpose of this conference? (Attach the agenda to the Request to Attend Form).

3. What do you anticipate the benefit will be to Richland One by attending this conference?

4. How will the information learned at this conference be shared with other Richland One Staff?

5. Will you be using a rental car? If yes, why?



Checklist for Completing Request to Travel (RTAs)

Name: _____

Items	Traveler's Initials
Registration Form: Attach completed registration form/invoice, which shows the amount due, payable to, and mailing instructions.	
Conference Schedule/Agenda: Include a copy of the agenda to include dates and times of the conference.	
Travel Justification Form: (Attachment B) Complete the District Travel Justification Form.	
Travel: If you are driving your vehicle to the conference, calculate round trip and vicinity mileage at a rate of \$.70 per mile.	
Airline Travel: Provide a quote/estimate for air travel. Employees have the option to use Forest Lake Travel or Kingston Bay (Purchase Order Required) or other travel websites (Personal Credit Card). If the employee is using Forest Lake or Kingston Bay, Procurement Services must have a copy of the Request To Attend (RTA) with all required signatures before a purchase order is issued to Forest Acre Travel.	
Lodging: Provide a hotel estimate indicating the dates and total amount of your stay. Employees are required to obtain their room at the lowest single rate.	
Meal Per Diem \$35.00 per day in-state \$50.00 per day out-of-state Departure after 12:00 noon = ½ day rate Arrival before 12:00 noon = ½ day rate	
Other Expenses Be sure to indicate if you will have additional expenses such as parking (valet, parking, etc.), rental car ground transportation (Uber, Lift, etc.), and/or baggage handling at the airport.	
Travel Request Form Complete the Request to Attend (RTA) form and indicate with an * each item you wish to have pre-paid and circle yes for prepayment. Ensure the traveler and immediate supervisor have signed and dated the form.	
Budget Code Please include the correct account number/budget code.	
Approval Immediate Supervisor and Executive Level Signatures	



Travel Reimbursement Checklist

Name: _____

Items	Traveler's Initials
Travel Reimbursement Form: Attach completed travel reimbursement form with correct budget code.	
Immediate Supervisor Signature	
Itemized Hotel Bill- Provide a "0" balance	
Travel Advance Check Stub	
Approved RTA Coversheet	
Other Travel Expenses if applicable: receipts for hotel parking, airport parking, baggage (to-and- from), taxi, shuttle, Uber, etc.	
Airline Travel: (Provide airline receipts if Forest Lake Travel was not used.)	

***Please Note:** *Gratuities/Tips associated with meals are not eligible for reimbursement.*