

SAN LORENZO UNIFIED SCHOOL DISTRICT ADMINISTRATIVE REGULATIONS

Business and Noninstructional Operations

AR 3350 (a)

ATTENDANCE AT CONFERENCES, WORKSHOPS AND TRAVEL

A. Purpose

The Governing Board supports the professional growth and development of District employees. The purpose of this policy is to provide for payment of the actual and necessary expenses, including traveling expenses, of any employee of the district incurred in the course of performing services for the district, whether within or outside the district, at the discretion of the Governing Board. Attendance at conferences must be pre-approved by the employee's immediate supervisor.

B. Services for the District

This policy is applicable to the following services:

1. Attendance by an employee at any convention or conference;
2. Visitation by an employee to any school;
3. Performance by an employee of similar services, where the purpose of such attendance or visitation or performance of similar services is for the discussion or observation of any school matter pertaining to the duties of the employee or any question of interest to the School District. This policy is limited in its application to services directed by the Governing Board or by the Superintendent.

C. Conference, Workshops and Travel Reimbursement

1. **RECEIPTS:** Itemized receipts are required for all claims except BART, AC Transit, bridge tolls, meals and similar expenditures.
2. **MEAL ALLOWANCES:** Receipts are not required. Meals included in the registration cannot be claimed. Meals should be claimed at actual amount spent, including tax and tip, not to exceed limits of:
 - Breakfast: \$15.00
 - Lunch: \$20.00
 - Dinner: \$31.00
3. **LODGING:** Only when overnight stay is required, or for destinations over 50 miles away from the travelers' work location. Single occupancy room cost plus tax. Identify room charges separately on hotel bill and reimbursement form. Reimbursement for Lodging is allowed for San Lorenzo Unified School District employees authorized travelers only
4. **REGISTRATION FEES:**
 - a. Copy of canceled check, original credit card receipt, or original conference receipt.
 - b. Copy of registration form.
 - c. Individual membership will be paid only if required as a part of registration or if it results in equal or lower registration cost.

5. SUPPLIES/MISCELLANEOUS: Items such as tapes and books require receipts and prior approval by the Program Manager.
6. MILEAGE:
 - a. Reimbursed at the current rate allowed by the IRS. (No reimbursement for gas, oil, tires etc. It is deemed included in the rate.)
 - b. Distance is lesser of home to destination or office to destination. On weekends and holidays, distance is home to destination.
 - c. If employees travel together in a private vehicle, only the driver may claim mileage reimbursement.
 - d. Mileage shall not exceed the going rate of airfare for the same distance unless specific circumstances make travel reasonable/economical. Prior approval by Program Manager is required. Adequate explanations must be attached to claim form to clarify the circumstances.
7. REIMBURSEMENT REQUEST FORMAT:
 - a. Name of payee as it appears on the payroll and school/work locations where reimbursement is to be sent.
 - b. Include dates expenditures were incurred.
 - c. Note related purchase order number and amounts on reimbursement form.
 - d. Only the person who actually paid the bill can be reimbursed.
 - e. Form approved by Program Manager.
 - f. Submit original copies of this form within fifteen (15) days after conference/meeting/workshop.
 - g. Submit mileage only claims monthly at the end of each month except for June which should be submitted according to the end of the year check-off list.
 - h. Reimbursement shall be paid to the employee within ten (10) business days of being received in the Accounting Office.
8. NO REIMBURSEMENT FOR THE FOLLOWING:
 - a. Alcoholic beverages.
 - b. Automobile expenses such as gas unless a rental or District car is used.
 - c. Entertainment and luxury items such as limousines, hotel suites, movie rentals, etc.
 - d. Meals paid for through registration.
 - e. Individual memberships (unless required for registration or results in lower or equal expense).
 - f. ANY AMOUNT THAT IS NOT AN ACTUAL AND NECESSARY EXPENSE INCURRED IN THE PERFORMANCE OF DISTRICT DUTIES.
 - g. No cash advances are permitted.
 - h. No reimbursements may be made for requests that are submitted more than 12 months after the completion of the conference.

D. Direction by Governing Board or Superintendent

1. This policy applies to services directed by the Governing Board
2. This policy also applies to services directed by the Superintendent to whom the Board hereby delegates the authority to perform all power described in this policy. Funds expended pursuant to such delegation shall not exceed the amount previously budgeted for such purposes by the Governing Board.

E. Manner of Payment

Expenses which are payable by the district under this policy may be paid as follows:

1. Expenses paid by an employee may be submitted for reimbursement on district-approved claim forms and shall be subject to reimbursement upon approval by the Superintendent or Designee.

F. Staff/In-service Expense Reimbursement

1. Staff meetings and/or in-service workshops that are scheduled to last at least 2½ hours or more may have refreshments provided, paid for by District funds, which a reasonably prudent person would provide for her/himself at a normal coffee break.
2. The Superintendent is authorized to reimburse for food in instances where the Superintendent judges that the District receives benefit from the expenditure.
3. All expenditure reimbursement forms under F.1 and F.2 above are to be approved by the appropriate Assistant Superintendent and the Superintendent and follow the normal route for reimbursement.

Legal Reference:

CALIFORNIA EDUCATION CODE

35160. Authority of Governing Boards

35172. Promotional Activities

44032. Travel Expense Payment

44033. Automobile Allowances

Board Adopted: September 15, 2015