

LAKE COUNTY SCHOOL DISTRICT TRAVEL EXPENSE GUIDELINES

There are times when travel is required in order for District employees to participate in meetings, events, professional development or training. While these trips serve a worthwhile function and are in service to the District's mission, it is critical that employees recognize that travel is a privilege. The following policies are designed to outline expectations for all District employees with regard to travel, and are intended to ensure that tax payer dollars are maximized and respected.

Approval for Travel

Employees wishing to attend functions, professional development or training opportunities on behalf of the District must secure approval from their immediate supervisor prior to making plans to attend. Employees must also turn in a District Travel Form (see below) to the district office in order to assist with making arrangements.

Travel Expense Policies

- District employees may reserve and use a District provided vehicle for group travel, if available. Reservation of a district vehicle should be done as soon as you know about the event, as vehicles are limited in number. Reservation is accomplished through the submission of a District Transportation Request Form.
- Employees may also choose to use their own vehicle and be reimbursed for mileage. The District will pay mileage for only one vehicle per four people attending a function. Official route mileage will be based on the shortest route as calculated at maps.google.com with the departure address being the street address of the employee's usual work site and the arrival address being the street address of the hotel (for overnight travel) or the conference facility (for non-overnight travel).
- When an overnight stay is required, the District provides a per night, per employee lodging allowance (see below). To save taxpayer and grant dollars, the District expects two employees of the same sex attending a meeting or conference to share a hotel room. An employee who does not wish to share with another employee, and who chooses to stay in a single room, will be responsible for booking and paying for his or her own room. She or he may then submit up to the per night, per employee allowance in hotel expenses for each night stayed to the District for reimbursement. If only one employee is going on a trip, or there are an odd number of employees needing rooms, the District will pay the entire cost of the necessary single room. This policy applies whether the travel is funded through a grant or through district general funds.
- Where multiple rates are available for a conference, the employee should remember that taxpayer dollars are being used to fund such expenses, and the room with the lowest rate should be selected.
- Employees will be reimbursed for meals on a per diem basis (see below). This reimbursement is based on the currently approved District Schedule and time of departure from and return to District. Employees leaving home prior to 7:30am are reimbursed for breakfast. Employees returning home after 7:30pm are reimbursed for dinner.
- Alcoholic beverages are never reimbursable. Employees paying for a meal using a district credit card should never include alcohol on the bill. Employees who violate this policy may have their District credit card privileges revoked.
- Employees on district travel may be accompanied by a family member or friend with prior approval and when the presence of the family member or friend will not interfere with the employee's successful completion of the objective of the trip. The District is not responsible for, nor shall it pay for at any time, any expenses incurred by or related to the employee's companion. If the employee is sharing a hotel room with his or her companion, the reimbursement policy for a single room outlined above applies for the employee.

Updated: 08-2017

Acknowledgements: Sabine Independent School District

- **Violation of any of these policies may be grounds for disciplinary action, up to and including termination.**

GUIDELINES FOR PAYING FOR TRAVEL

The employee should maintain and submit copies of receipts for all expenditures. Regardless of the amount paid by the employee, meals are reimbursed based on approved District Schedule (see below). Meal receipts must be itemized. If a receipt is lost, employees must complete a lost receipt form. Employees should secure a tax exempt form prior to travel as the District will not reimburse for state hotel taxes. Employees requesting reimbursement for travel should submit receipts in a timely manner, but no later than 30 days after the date of the travel. Receipts submitted after that time will not be reimbursed. In order to receive reimbursement, employees must complete a District Reimbursement Form.

Advances

District employees may choose to cover their own mileage and meal allowances and be reimbursed, or to receive an advance. If an advance is desired, the employee should make sure that these requests are made at least two weeks in advance to allow sufficient time to generate the requested check. If such request is not made two weeks prior to travel, the business office will reimburse the employee for his/her expenses in the next check run following the return of appropriate travel receipts. If an advance is made by the District, the advanced funds shall only be used for the purpose for which the advance was made, and that any unspent funds from the advance must be repaid to the District. Whether or not an advance is received, all employees must complete a District Reimbursement Form to document any travel-related expenses.

Lake County District per Diem Meal Allowance, Lodging Allowance & Mileage Schedule, 2016-17

The per night, per employee lodging allowance is calculated as follows:

50% of the cost of a double room in the hotel where the District is arranging rooms for participating employees

Example: The conference hotel is charging \$140 per night for double rooms for conference participants. The per night, per employee lodging allowance is \$70.

Meals are reimbursed up to the following rates on a per diem basis. Amounts turned in for reimbursement over this amount will not be reimbursed; amounts turned in over these amounts via a district credit card will need to be reimbursed to the district:

Breakfast: up to \$10.00 before tax and tip

Lunch: up to \$15.00 before tax and tip

Dinner: up to \$25.00 before tax and tip

Mileage is reimbursed at \$.50 per mile.

LAKE COUNTY SCHOOL DISTRICT TRAVEL FORM

Please turn in this form **with your Leave Request form** no later than three weeks before your trip.

Employee Name: _____

Today's Date: _____

Name of Event / Conference / Training: _____

First Day of Event & Start Time: _____

Last Day of Event & End Time: _____

Location of Event _____

Other staff going with you? _____

Do you need a substitute for the days you are gone? YES NO
If yes, please indicate this also on your Leave Request form.

Travel to event (circle): District Vehicle Personal Vehicle Plane Combination

Please explain any details we might need related to your travel: _____

If you are using a district vehicle, please also submit a Transportation Request Form. If you are taking your personal vehicle, note that the district will only reimburse mileage for one vehicle per four employees.

If you are traveling by plane:

What is your full legal name? _____

What is your date of birth? _____

Lodging: *The district requests that employees of the same sex share a hotel room to save costs. Employees who wish to have their own room are required to book it themselves and to pay for the room. Employees staying in their own room may then submit up to the per night, per employee lodging allowance amount for this trip for reimbursement.*

I am happy to share a room.

I will book and pay for my own room &
I will submit reimbursement for the allowance amount.

Name of Event Hotel (if applicable): _____

Meal expenses: *Meals may be reimbursed up to the per diem amount. Employees may pay for meals and be reimbursed, or request an advance.*

I request an advance.

I do not request an advance