



### Proposed PCHS Travel Policy:

Conference/Travel Request Forms must be approved by the Executive Director/Principal prior to committing any funds and shall be forwarded to the Finance Office at least two weeks in advance of any trip or conference. Conference/Travel not approved in advance by the Executive Director/Principal may not be reimbursed.

When travel is requested by the employee, same guidelines apply, however there will be a limit placed on the reimbursement amount for lodging & travel. The limits are as follows:

Lodging: Up to \$150

Travel: Up to \$150

Meals: Up to \$40, only if the conference is considered out of district.

Mileage: If the distance to the conference is less than your daily commute to Pali, there will be no mileage reimbursement. Pali would approve mileage for conferences up to 50 miles from your home.

When Travel is required by the school, all costs will be covered, but under these specific guidelines.

#### **In-district Travel**

Travel within Los Angeles and Orange Counties shall be considered "in-district" travel. Reimbursement for use of a private vehicle for in-district travel shall be submitted on the Mileage Reimbursement Claim Form and shall be paid at the current IRS-approved rate. Parking fees should be included on the Mileage Reimbursement Claim Form and the receipt attached. Mileage will only be covered when the conference is

Mileage Reimbursement Claim Forms may be submitted at the end of each semester or when the cumulative reimbursement amount reaches \$25.00.

Meals associated with in-district travel are not normally allowed unless part of a specific meeting of conference. Prior approval by the Superintendent or designee is required. Reimbursement shall be claimed through a Travel & Conference Claim Form.

#### **Out-of-district Travel**

All out-of-state travel requires approval by the Board of Trustees.

After the Travel Request Form has been approved, the district will advance funds via purchase order or school credit card for conference registration, airfare, and hotel accommodations. Personal credit cards may be used with prior authorization.

1. Advance payments for conference registration or airfare will be made by purchase order or check wherever possible.

2. Hotel accommodations will be paid for by an advance payment by district purchase order or district check wherever possible. A personal credit card may be used to hold the reservation and a district check hand-carried to the hotel.

Advances for other expenses will be made only if approved by the Executive Director/Principal, under special circumstances. Advances will not be made for non-employees such as parents or community members.

### **Travel/Conference Expenses**

Completed travel claims and all accompanying receipts must be approved by the supervisor and filed with the Business Office within 30 days of completion of travel.

#### Allowable Expenditures

With the exception of certain meals and bridge tolls, all travel expenses claimed must be accompanied by a receipt or other documentation. Credit card statements are not considered receipts. Allowable expenses are restricted to reasonable and necessary actual expenditures.

1. Hotel accommodations at the single occupancy rate will be allowed if an overnight stay is necessary.
2. Transportation expenses will be allowed based on the lowest total cost alternative and consideration of required travel time. In order to minimize travel costs, carpooling shall be utilized whenever possible. In the case of carpooling, mileage reimbursement will only be provided to the driver. Transportation to and from conference is determined by the lowest cost possible, i.e. if the cost of flying to the conference is lower, employee shall fly as opposed to drive, and vice-versa.
  - a. Airfare is restricted to economy rates unless approved by the Executive Director/Principal. Total air travel costs include mileage to and from the departure airport, tolls, parking, and the lowest cost alternative shuttle service from the destination airport to the meeting location.
  - b. Private vehicle will be reimbursed at the current IRS-approved mileage rate along with bridge tolls and parking fees.
  - c. Rental vehicles will not be allowed unless no other means of transportation from the destination airport to the meeting location is available. A rental vehicle may be approved if travel among various locations at the destination is required and not otherwise reasonably available. The school will pay for a rental vehicle in the economy classification or, if the number of school passengers warrants, a van. In no case will the district pay the additional cost for premium, luxury or sport/utility vehicle rentals. The "loss damage waiver" must be specified and will be considered a reimbursable cost.
3. Meal reimbursements shall be based on actual and necessary meal costs within prescribed allowances, including gratuities not to exceed 15%. If a meal is not taken, no amount may be claimed. If the actual cost is less than the limitations prescribed herein, only the actual amount may be claimed.
  - a. Meals included in a conference or meeting and for which there is a prescribed fee are not subject to these limitations.



b. The maximum meal allowance per day is \$40.00 for a full travel day. If less than a full day's travel is required or if a meal is included in a conference registration, the following limitations apply:

Breakfast \$10.00

Lunch \$10.00

Dinner \$20.00

A meal may be claimed when out-of-district before 7:00 a.m. and/or after 5:00 p.m.

#### Non-Reimbursable Expenses

Personal expenses such as entertainment, transportation to and from entertainment, leisure tours, alcoholic beverages, gifts, donations, personal telephone calls, and expenses for guests/spouses/friends are not reimbursable.