

PELHAM SCHOOL DISTRICT POLICY

DKCA-R – DISTRICT TRAVEL REIMBURSEMENT PROCEDURES

Definitions

In-District Location: any location within the Town of Pelham to which employees travel to conduct business on behalf of the School District.

Temporary Place of Business: a location outside the Town of Pelham to which employees travel to conduct business on behalf of the School District.

Factors Considered in Approval Process

In reviewing a request, the Superintendent or Administrator shall consider at least the following factors:

- Value to the District and to the individual.
- Available funds.
- Individual's membership in the association or group sponsoring the event, if applicable.
- Whether the person making the request is on the event program. Direct participation shall be considered an added reason for approval.

Conferences, Seminars, Workshops

For activities approved in the District's operating budget, authorized by an employment contract or upon written or electronic request to the Superintendent, permission may be granted to non-union staff members to attend work-related conferences, seminars, or workshops at District expense. Maximum reimbursement for these activities shall be limited to:

- Full cost of registration.
- Meals. Guideline is up to \$50.00 per day for three meals which will be reimbursed upon submission of itemized receipts. Amount must be prorated for any meals included in the registration fee.
- Travel expenses.

Private Transportation

Travel reimbursement for use of private transportation shall be at the rate established by the Internal Revenue Service and shall be subject to the following conditions:

Non-Reimbursable Expenses

- **Commuting Expenses.** No person shall be reimbursed for the cost of traveling between their home and any in-district location.

Reimbursable Expenses

- **Limitations.** All mileage expense reimbursement shall be limited to the direct travel distance between two locations.
- **Temporary Place of Business.** Employees may be reimbursed for mileage expenses incurred traveling between an in-district location and a temporary place of business to perform school district business. Employees may be reimbursed for mileage expenses incurred traveling between their home and a temporary place of business to perform school district business.
- **In-District Locations.** Employees may be reimbursed for mileage expenses incurred traveling between two in-district locations to perform school district business. The

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Superintendent or designee shall maintain and disseminate a chart showing the mileage between the various schools and school-related facilities.

Expense Guidelines

Transportation

Method of transportation selected must be the most advantageous to the District, when cost and other factors are considered. Travel must be by the most expeditious means of transportation practical and commensurate with the nature and purpose of the employee's duties. Employees choosing methods of transportation that are not the most advantageous to the District, as determined by the Superintendent or designee, or by the Pelham School Board when the employee is the Superintendent or a member of the Board, shall be personally responsible for the additional expense over the most advantageous method.

Air

Employees are encouraged to procure economy and/or discounted fare. Higher priced options shall be approved in advance by the Superintendent or Business Administrator, or designees. Employees shall make reservations far enough in advance to receive a discounted fare whenever possible. Reimbursement shall be for the cost of airfare from departure point to point of business destination and original point of return only. If personal stops are made en route to a business destination, the employee shall be reimbursed only for the original discounted round-trip coach fare from original departure point directly to the business destination and point of return.

Ground

Use of other modes of transportation may be approved by the Superintendent or designee, or by the Pelham School Board when the employee involved is the Superintendent or a member of the Board, based on circumstances of travel that render air transportation uneconomical or impractical. When applicable, rate for reimbursement for ground transportation or an employee's personal vehicle shall be based on the current IRS guidelines.

Lodging

Reimbursement for lodging shall not be provided when the conference site is within fifty (50) miles (one way) driving distance from the closer of the Town of Pelham or the employee's home unless previously approved by the Superintendent or designee, or by the Pelham School Board when the employee involved is the Superintendent or a member of the Board.

Lodging accommodations for approved conferences shall be based on single occupancy rates. The Pelham School District shall not reimburse employees for lodging expenses incurred for additional guests in the same room who are not District employees on official District business. If there are no vacancies in the hotel where the conference is being held, the employee shall attempt to secure comparable rates at the nearest hotel.

Lodging shall be provided for the night prior to a conference, through the last day of the conference.

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Business Meals

The IRS has stringent regulations regarding business meals, one of which is that the meal must directly precede or follow substantial and bona fide business discussion. The Pelham School District must be able to properly document the meal to satisfy these requirements. Therefore, the following information shall be provided when requesting reimbursement for a business meal:

- Cost (including tax and tip)
- Date
- Name and location of restaurant
- Names, titles, and business relationship to all persons attending
- Business purpose
- Itemized receipt

Alcohol

No alcoholic beverages shall be purchased with Pelham School District funds.

Personal Travel

When personal travel is co-mingled with the District, business travel employees shall be required to separate business expenses from personal expenses when submitting their travel reimbursement expense form.

Please remember that employee travel is always subject to public disclosure and therefore additional accounting and scrutiny is required by the employee and the District to separate District business travel from any personal travel.

Reimbursement

Any employee wishing to be reimbursed for travel expenses incurred under this section must complete a travel reimbursement expense form containing a compilation of expenses incurred. The Superintendent or designee shall establish procedures for reimbursement in order to insure efficient practices. Requests for mileage reimbursement shall be submitted, when possible, prior to the conclusion of the fiscal year.

Employees issued a District procurement card shall use the p-card for all expenses (where accepted), except for those not allowed under the p-card procedure (e.g. personal meals).

Reimbursement of any expense associated with courses, workshops and/or travel expenses to a member of the Pelham Educational Association (PEA) or the Pelham Educational Support Personnel Association (PESPA) will follow the requirements within the collective bargaining agreement over those outlined in this procedure.

District Policy History:

Adopted: June 18, 2014