



Code: **DLC-AR**  
Adopted: 8/23/06  
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## **Staff Travel Expenditures Guidelines**

District employees traveling for approved district business will be governed by the following procedures and will be reimbursed for travel-related expenditures which have been incurred in accordance with the same procedures. Travel expenses include airfare, meals, lodging and expenses incidental to travel. Only travel expenses that are ordinary and necessary in the conduct of approved travel for district business purposes and directly attributable to such travel will be allowed. As used in this regulation, an “ordinary” expense means one that is common and accepted in the profession; a “necessary” expense means one that is essential and appropriate in order to conduct district business. Travel expenditure procedures established by the district will also apply to Board members traveling on Board-approved district business, as applicable. Whenever possible, travel expenditures should be charged on a district procurement card, rather than paid for with an employee’s personal funds and then reimbursed back to the employee.

### **Allowable Travel Expenditures**

1. Airfare;
2. Transportation related costs - taxi, shuttle, parking, luggage fees;
3. Rental vehicle;
4. Mileage for personal vehicle use;
5. Lodging;
6. Meals;
7. Gratuity (tips) no more than 20 percent (20%);
8. Registration fees.

### **Unallowable Travel Expenditures**

1. Fuel/gasoline purchased for personal vehicle;
2. Airfare costs above Economy Class rates;
3. Gratuities (tips) in excess of 20 percent (20%);
4. Alcohol or tobacco products, entertainment, gambling;
5. Personal items;
6. Meal costs that exceed daily per diem rates established by the district.

## **Vehicle Use**

Staff will use district owned vehicles, whenever possible, while conducting district business that requires travel. Staff will also attempt to carpool whenever possible, to reduce the expense to the district.

### **Private Vehicle Use**

1. Private vehicles may be used in conducting district business only with prior building principal/program manager approval.
2. Approval may be granted on an individual trip basis or by pre-approval, as deemed appropriate by the manager.
3. Travel in a private vehicle for the purpose of conducting district business may be approved when:
  - a. A district vehicle is not available;
  - b. The destination is not conveniently accessible by commercial carrier;
  - c. Various points must be visited and commercial carrier schedules are such that the use of commercial carrier transportation is not practical;
  - d. Carrying articles by commercial carrier would not be feasible;
  - e. Commercial travel is deemed to be less economical.
4. When using a private vehicle, the employee should not purchase fuel/gasoline with district funds. The cost reimbursement will come in the form of a mileage reimbursement.

### **Insurance Coverage (Personal Vehicle)**

1. All district employees operating private vehicles on approved district business are required to maintain vehicle liability insurance that meets or exceeds Oregon statutory minimum limits.
2. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance.
3. The responsibility of the district for damages resulting from vehicle accidents is not the same as set forth in the district's general liability insurance policy, which covers district-owned vehicles. The employee's insurance coverage provides primary coverage when the employee is driving his or her own vehicle on approved district business.

### **Mileage Reimbursement**

1. An employee using their personal vehicle will be reimbursed for that use through a mileage reimbursement.
2. Mileage reimbursement rates will be based on the current Internal Revenue Service (IRS) standard mileage rate per mile, established in January of each calendar year.
3. The mileage reimbursement is the only reimbursement that the employee will receive for personal use of their vehicle. It is intended to cover the standard, average costs of using a vehicle – including fuel, insurance, maintenance, repairs, etc.

4. Mileage reimbursement should be claimed and submitted to Fiscal Services no less than on a monthly basis. (See Employee Reimbursement Requests section below for more detail.)

### **Vehicle Rentals**

1. Rental vehicles may be used only when use will affect a savings or otherwise be more advantageous to the district or when the use of other transportation is not feasible.
2. Rental of no larger than an economy or compact size vehicle is required, unless the district business needs require a larger vehicle be obtained.
3. Rental vehicles will only be used for official, necessary travel. Any additional costs incurred through personal use will be the personal responsibility of the traveler.

### **Out of State Travel**

All out of state travel requires prior superintendent or designee approval.

### **Reservations, Commercial Carriers and Lodging**

1. Travel must be conducted in the most expeditious and cost-effective manner, as determined by the district.
2. Each employee is responsible for ensuring his/her own reservations are made correctly and timely – by working with the appropriate support staff and/or the district-contracted travel agency.
3. The district prohibits the accrual of travel credits or “points” for individuals traveling on approved district business.
4. Lodging will be approved at reasonable commercial rates. The district uses the U.S. General Services Administration (GSA) rates as a guideline for “reasonable” rates for lodging. Exceptions may be approved if the lodging is also the site of the work activity and district needs require the employee to stay at that location.
5. Staff making lodging reservations should request the government or education rate or lowest possible rate.

### **Meals**

1. Meals while traveling on approved district business are allowable – subject to some restrictions.
2. Allowable meal “per diem” rates are based on the U.S. General Services Administration (GSA) rates. These are tiered rates, based on location. If the travel location isn’t specified within the GSA charts, the Standard CONUS (contiguous United States) Rate will be applied.
3. The meal rate includes gratuity.
4. A meal will NOT be allowable if that meal is included elsewhere – for example, breakfast included in hotel stay, lunch or dinner included/provided during conference, etc.

5. For partial day travel, meals will be allowable based on the following schedule:

<b>Initial Day of Travel</b>	<b>Breakfast</b>	<b>Lunch</b>	<b>Dinner</b>
Leave prior to 7:00 am	Yes	Yes	Yes
Leave between 7:00 am and 1:00 pm	No	Yes	Yes
Leave after 1:00 pm	No	No	Yes

  

<b>Final Day of Travel</b>	<b>Breakfast</b>	<b>Lunch</b>	<b>Dinner</b>
Return prior to 12:00 pm	Yes	No	No
Return between 12:00 pm and 6:00 pm	Yes	Yes	No
Return after 6:00 pm	Yes	Yes	Yes

**Meals - Small Group** (less than five)

For groups of less than five employees, meals will be charged on a district procurement card or reimbursed to the employee. This method will also be used for one day travel with any size group. The GSA meal rates will apply. The allowable meals will be charged on a district procurement card or actual expenditure reimbursed to the employee after the fact. This will require the employee to provide itemized receipts for each meal, whether as backup for the procurement card expenditure or as support for the expense reimbursement.

**Meals - Large Group** (five or more)

For groups of more than five employees traveling together for a period extending beyond one business day, the district will pay each employee a “per diem” rate for each allowable meal during their travel. The support staff person organizing the travel will provide the Fiscal Services Office documentation to support the allowable meals for each employee in the group, based on the days of travel, whether meals are provided as part of the travel, etc. This per diem rate will be based on the GSA rates. It will NOT require any receipts or documentation from the employee – and no restrictions will be placed on how it is expended. No other meal reimbursement will be provided.

**Personal Travel Combined with District Business Travel**

If an individual traveling on approved district business chooses to engage in both business and personal activities, travel expenses incurred will be allowable only for expenses that are ordinary and necessary in the conduct of district business. Expenses incurred as a part of personal business are the sole responsibility of the traveler.

## **Cancelled Trips**

1. If a trip is cancelled due to unforeseen circumstances, the employee is responsible to notify and coordinate with the appropriate building principal or program manager as soon as possible.
2. If an employee cannot leave at the scheduled time, it is his or her responsibility to call the travel agency or carrier to arrange to have the tickets cancelled or exchanged.
3. Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.
4. Lodging reservations must be cancelled by the employee as soon as possible to avoid cancellation charges.

## **Employee Reimbursement Requests**

Ideally, staff travel expenditures shall be charged to a district procurement card at the time of the transaction. If that is not possible logistically and an employee incurs an approved travel expenditure on their own, the district will reimburse them for that expenditure, if and when the appropriate documentation is received.

1. Reimbursement requests detailing actual expenditures must be submitted on the district's Expense Reimbursement Form and/or Mileage Reimbursement Form. Each form must be signed in writing (stamped approval is not acceptable) by the employee's principal/program manager or direct supervisor.
2. Receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, receipts for transportation, lodging, meals, registration, and conference and workshop fees. All receipts must be itemized – lodging must show the itemized charges, meal receipts must show the items ordered, tip amount, etc. Non-itemized receipts are not an acceptable form of documentation.
3. Mileage reimbursement requests must include documentation of the travel, by means of conference information and maps showing the travel distances. The only exception to this requirement is travel between district sites.
4. The reimbursement request is then routed through the normal district purchase requisition processes.
5. All requests should be submitted to the district office (via the appropriate departmental support staff) within 10 working days of the conclusion of the trip.
6. Mileage only reimbursements may be requested on a monthly basis, at month end or more frequently if needed.