

TRAVEL/REIMBURSEMENT

I. PURPOSE

To identify the types of travel permitted on district time and/or at district expense; the authorizations and approvals needed; and the allowable reimbursement limits for school district employees and Board of Education members.

II. POLICY

A. Any travel on District time and/or at District expense shall be:

- educationally necessary and critical to the instructional needs of the District or furthers the efficient operation of the school district,
- fiscally prudent,
- directly related to, and within the scope of, the employee's or board member's current responsibilities and/or the District's professional development plan, and
- in compliance with State travel payment guidelines as established by the New Jersey Department of the Treasury in NJOMB circular 06-2, NJOMB circular A-87, and Chapter 53 Section 15.

B. The annual budget for the District shall contain a maximum expenditure amount that can be allotted for travel and expense reimbursement.

III. GENERAL RULES

A. Individual Requests - It is necessary for EACH individual to complete a travel authorization form to attend any conference or event.

B. Approval by the Board of Education (Board). In accordance with Chapter 53 Section 15, travel must be approved by the Superintendent and by a majority of the full voting membership of the Board at a public meeting, prior to the actual occurrence of the travel. The school board will not ratify or approve payments or reimbursements for travel after completion of the travel event, with the exception of regular business travel caused by or subject to contractual provisions, other statutory requirements, or federal regulatory requirements provided the annual amount does not exceed \$2,500.00 to any employee.

C. A Board member shall recuse himself/herself from voting on travel if the Board member, a member of his/her immediate family, or a business organization in which he/she has an interest, has a direct or indirect financial involvement that may impair his/her objectivity or independence of judgment.

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D. Cap on Expenses – Reimbursement is limited to what is permitted by the Department of Treasury in NJOMB circular letter 06-02, OMB Circular A-87 and the federal U.S General Services Administration (GSA). Refer to the website at www.gsa.gov/perdiem. Any amount in excess of these limits or not in compliance with these rules or procedures shall be the personal responsibility of the individual.

E. Form(s) required for travel approval:

- (1) "Request for Travel Authorization/Professional Leave Form" to be submitted to the individual's Principal or immediate supervisor at least sixty (60) days in advance of the date of travel. All back-up documentation (date of conference/event with printed notice flyer, registration form; quote for air/hotel expenses, etc.) must be attached at the time of original submission. Also, accurate account numbers must be noted on the "Request for Travel Authorization/Professional Leave Form."

The Principal or immediate supervisor will submit the "Request for Travel Authorization/Professional Leave Form" for approval by the Assistant Superintendent, Business Administrator, and the District Superintendent. The "Request for Travel Authorization/Professional Leave Form" must note whether the conference/event will count towards the individual's continuing education requirements and for how many hours.

It is the responsibility of each administrator or supervisor to review the merits of the request in terms of its educational value and relevance for the attendee, as well as all costs indicated.

F. Arrangements Prior to Approval - the individual should not make commitments on travel arrangements prior to approval. ALL expenses incurred prior to approval by a majority of the full voting membership of the Board are at the individual's own risk of personal liability.

G. Budgeting - All requests for travel expenses for attendance at conferences/events must have been budgeted in the appropriate fiscal year.

H. Least Expensive Method of Travel and Selection of Conference/Event closest to Holmdel Township - It is required that all individuals will seek and obtain the most reasonable/least expensive method of travel and select the most cost efficient and closest in proximity to Holmdel Township.

I. Reimbursement/Pre-Payment - Individuals will usually pay for their travel expenses first and then subsequently submit it for reimbursement after the travel has been completed. He/She shall not receive an amount for travel and travel-related expenses in advance. However, expenses may be paid in advance through purchase order, only after the Board has approved the travel form. If advance payment is requested and made, the individual making the request to travel assumes personal responsibility for air ticket insurance and/or cancellation fees.

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- J. Air Fare - If traveling by air, only economy class is approvable, and discounted air fares should be sought.
- K. Hotels – The individual is required to make arrangements to stay at the hotel where the conference is being held. Lodging expenses may exceed the federal per diem rates if the going rate of the hotel is in excess of the federal per diem rate. If the hotel at the site is no longer available, lodging may be paid for similar accommodations at a rate not to exceed the hotel rate for the event. If the conference hotel is not being used the individual should then find a hotel whose rates fall within the federal per diem rate (In accordance with the Department of Treasury in NJOMB circular letter 06-02, OMB Circular A-87, and Chapter 53 Section 15 the District is required to follow the federal per diem rate for the hotel the city is in). Unless substantial justification is provided, reimbursement will be limited to the federal per diem rate and the individual will be personally responsible for any amount above that rate. Federal per diem rates for lodging can be found at www.gsa.gov/perdiem.
- L. Auto Rentals and Limousines – In accordance with Chapter 53 Section 15, rental car and limousine use are not allowed. Instead, airport and hotel shuttle service should be used.
- M. Meals – Reimbursement for meals and incidentals should not be requested for any meal which is included in the registration fee of the event. For overnight trips, breakfast on the day of travel to the event, and dinner on the day of travel from the event, are not reimbursable. One day trips that do not involve overnight lodging are not eligible for meal reimbursement.

Reimbursable meal costs, including tips must be in accordance to the federal per diem rate for the city traveled to. Any charges above the total allowed rate for the city will not be reimbursed. Please refer to the website at www.gsa.gov/perdiem for current per diem rates for the city for which travel is approved.

- N. Use of Private Vehicle - Persons using privately owned vehicles on authorized travel must carry personal automobile insurance, collision, and comprehensive insurance. The district will reimburse for transportation on bus and train and/or mileage up to the IRS mileage reimbursement rate, tolls, and parking. When using a personal auto to/from an airport, long-term parking should be utilized.
- O. Non-Reimbursable Expenses - No reimbursement will be given for:
 - Personal expenses
 - Motor vehicle citations
 - Alcoholic beverages
 - Video rentals and other entertainment costs
 - Meals in excess of the per diems established in NJOMB circular letter 06-02 and the federal U.S. General Services Administration (refer to www.gsa.gov/perdiem)
 - Charges for laundry/valet service
 - Reverse telephone charges or third party calls
 - Car or Limousine Rental

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- P. Expense Report - Upon return from an authorized trip, the standard expense report form must be completed and presented to the Principal or immediate supervisor, listing actual expenditures. **Original receipts for each item claimed must be attached.** Credit card summaries are not acceptable. Charges listed as miscellaneous must be explained and have receipts. Total reimbursement shall not exceed the total amount approved on the "Request for Travel Authorization/Professional Leave Form".

- Q. Report of Conference - A written report of the attended conference event shall be presented to the Principal or immediate supervisor within ten (10) working days. This report must include: (1) schedule and title of each event attended; (2) the key issues addressed at the event; and (3) the relevance of the key issues to improving instruction and/or the district's operations.

Source: Regular Board Meeting

Date: August 20, 1986

Revised: August 29, 2007

Legal Reference: N.J.S.A. 18A:11-1 General mandatory powers and duties

Cross Reference: 4231.1 Staff Development; Inservice Education/
Visitations/Conferences