

Administrative Regulations (AR) 3350

Business Travel Expenses

The Washington Unified School District will cover the necessary expenses for employees who engage in pre-authorized travel, referred to as business travel, while performing their duties within the scope of employment, in accordance with Board Policy 3350. Business travel includes authorized participation in conferences, workshops, symposia, lectures, administrative meetings, and other employment-related activities aimed at enhancing the employee's knowledge and competence, thereby furthering their ability to carry out job assignments and contribute more effectively to the District's goals and operations.

Business travel claims must represent actual, ordinary, and necessary expenses for meals, lodging, transportation, and other essential expenditures related to official District business. Business travel expenses charged to special entitlement grants must comply with the terms and conditions of those grants. Accommodations will be made for qualified employees in accordance with the Americans with Disabilities Act (ADA).

The Travel/Event Request Form is used to request approval, and the Business Travel Reimbursement Form is used to request reimbursement of expenses after the event.

Business Travel Requests

Employees must complete the Travel/Event Request Form to obtain pre-approval for travel. Business travel expenses will not be reimbursed for trips made without prior approval. Business travel requests must be submitted at least one (1) month in advance for administrative approval; three (3) months are recommended for out-of-state conferences requiring Board Approval. The Travel/Event Request Form must be fully completed, with an attached conference flyer that includes a schedule of activities. Upon completion of travel, employees must submit the reimbursement claim on the Travel/Event Reimbursement Form to the Fiscal Services Department within two (2) weeks of returning from the trip. Claims for reimbursement submitted more than one (1) month after business travel will require a written explanation for the delay from the employee's supervisor. Claims must be processed in the fiscal year in which the business travel occurs. All business travel in June must be submitted by July 15th.

Cash Advances

Cash advances may be requested when the total of reimbursable business travel costs exceeds \$500. The cash advance will be up to 90% of the estimated business travel cost. Any excess amount issued to an employee must be immediately refunded to the District via personal check within two weeks of completion of travel.

The cash advance may not exceed per diem rates or necessary estimated expenses, excluding private or commercial transportation costs or any prepaid expenses. Cash advances must be approved by the Superintendent, Chief Business Officer, or Director of Fiscal Services.

The approved Travel/Event Request Form will be used to obtain a cash advance. The approved Travel/Event Request Form must be received in the Fiscal Services Department at least three (3) weeks prior to the departure date. Cash advances will be provided no sooner than one week before the departure date.

Upon completion of travel, employees must submit a reconciliation of expenses on the Travel/Event Reimbursement Form to the Fiscal Services Department within two (2) weeks of returning from the trip. Failure to submit documentation may result in being invoiced for the cash advance amount.

Business Travel and Work Hours

Business travel should be scheduled during an employee's regular work hours or contracted workday. Employees who have approved business travel outside their regular work hours or contracted workday are not eligible for additional compensation, except when such business travel is required and pre-approved as part of their assigned duties beyond the regular work hours or contracted workday. Prior approval must be given by the employee's supervisor.

If an employee chooses to travel before a conference or event for personal reasons, any time away from work that is not required by the conference/event must be entered into the District's absence management system and appropriately coded for the absence.

Business Travel Arrangements and Cancellations

Business travel arrangements will be made through the Fiscal Services Department and/or the District business travel Vendor system. If business travel arrangements must be canceled for any reason, they must be canceled with sufficient time to prevent the District from incurring unnecessary costs.

Transportation

Transportation reimbursement will be limited to the most direct and least expensive mode of travel. For example, if an employee opts to drive to Southern California, where airfare is less expensive than mileage reimbursement, the employee will only be reimbursed for a comparable airfare amount. The meal reimbursement will be based on the amount of business travel time

associated with the comparable flight. Early check-in/boarding fees, weight limit fees, and fees for a second checked bag will not be reimbursed without prior approval from the employee's supervisor.

- **Commercial Transportation (Air, Bus, Rail):** The lowest-cost refundable ticket will be booked for travel. Departing and returning transportation should be scheduled during the employee's regular work hours or contracted workday. Returning transportation should be arranged for the last day of the event. However, with prior approval by the Superintendent or Chief Business Officer, employees may return the following day if the event concludes after their regular work hours.
- **Mileage Reimbursement:** Employees will be reimbursed per mile for authorized use of their personal vehicle. Reimbursement will be based upon the number of miles between the event destination and the employee's designated work location, and paid at the current mileage rate established by the Internal Revenue Service (IRS). The District will reimburse the actual cost for parking and tolls directly related to the travel.
- **Vehicle Rentals:** Rental vehicles will be used only when no other mode of transportation is available or when alternate transportation would be more expensive. The use of rental vehicles must be authorized in advance by the Superintendent or Chief Business Officer. If a rental vehicle is authorized, employees should request the least expensive vehicle category that meets their needs. Reservations should be made as far in advance as possible to secure the best rates. In no case will the District pay the additional cost for premium or luxury vehicle rentals. The District's liability coverage will apply, if at all, only after the employee's auto insurance coverage is exhausted. The District does not cover, nor is it responsible for, comprehensive, uninsured motorist, or collision coverage for the rental vehicle.
- **Parking and Toll Fees:** The District will reimburse expenses, such as bridge tolls and parking fees, incurred due to an employee's authorized use of a vehicle while traveling on District business. Receipts, excluding parking meters, are required.
- **Shuttle, Taxi, Rideshare, Public Transportation:** Use hotel courtesy buses, shuttle services, or public transportation when available. Rideshare (e.g., Uber, Lyft) and taxi services will be used only when no other convenient, less costly mode of transportation is available. Tips and gratuities for transportation are limited to fifteen (15) percent of the service cost. Transportation costs will only be reimbursed for travel directly related to the official District business. Travel for personal reasons is not eligible for reimbursement.

Lodging

Lodging will be approved for business travel more than 75 miles from the District Office. Prior approval from the Superintendent or designee is required for all overnight stays within 75 miles of the District. The District will pay for lodging for the evening before and/or after the event if the

employee has to travel for business at unreasonably early or late hours to reach the event destination. The District will not pay for overnight stays prior to or after the meeting or business event without the employee's supervisor's prior approval.

The Fiscal Services Department will book lodging for District employees on business travel that requires one or more overnight stays, provided a conference rate is available. The Fiscal Services Department will make an effort to obtain lodging at or near the event facility. Non-conference rate stays will be made through the District business travel system.

Lodging will be booked at the single occupancy standard room type rate. If lodging is at a conference-designated hotel, the rate must be the designated conference rate or below. If lodging is at a non-conference-designated hotel, the rate cannot exceed the designated conference rate.

Meals

A daily maximum per diem of \$80.00 is allowed when meals are not provided as part of the conference or hotel registration. No receipts are required by the District. No alcohol is allowed. When a single meal is needed, the maximum allowances are as follows:

- Breakfast: \$20.00
- Lunch: \$22.00
- Dinner: \$33.00
- Incidentals: \$5 per day

Employees traveling for business are eligible for meal reimbursements based on the start and end times of their travel:

- **Breakfast:** Reimbursement is allowed if business travel occurs from midnight to 6:00 a.m.
- **Lunch:** Reimbursement is allowed if business travel occurs between 6:00 a.m. and 2:00 p.m. and includes the typical lunch time window (defined as 11:00 a.m. to 2:00 p.m.).
- **Dinner:** Reimbursement is allowed if business travel begins after 2:00 p.m. and extends past 6:00 p.m.

Reimbursement for alcoholic beverages is never permissible.