



# Huntington Beach Union High School District Board Policies and Administrative Regulations

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## Business and Noninstructional Operations Travel Expenses

1. Staff members of the district may attend appropriate professional and official business conferences, meetings and workshops within their area of responsibility, in order to keep abreast of new and innovative trends. Attendance shall be in accordance with approved budget allocations.
2. Attendance at professional and official business conferences, meetings, and workshops must be approved in accordance with the Professional Business Authorization Grid (attached).
3. Authorization Request for Professional Business Attendance (Form 50.45) should be in the office of the Assistant Superintendent - Educational Services ninety (90) days prior to the date of the professional and official business conferences, meetings, or workshops if board approval is required. All out of state travel, regardless of cost, requires board approval.
4. General

### ONLY ACTUAL AND NECESSARY EXPENSES FOR THE CONFEREE ARE REIMBURSABLE.

- A. Expenses of guests or family members are not reimbursable.
- B. Reimbursement for transportation shall be on the basis of the most reasonable, most direct and least expensive route available by the authorized mode of transportation. Mileage will be reimbursed at the lessor of miles from work to destination or home to destination.
- C. If a district vehicle is used, reimbursement for mileage by private automobile cannot be claimed. Administrators receiving travel allowances will not be reimbursed mileage.
- D. Reimbursement is limited to the amount authorized by the Governing Board, the Superintendent or Assistant Superintendent.
  1. Amounts over \$1,500 per individual require approval by the Governing Board.
  2. Amounts under \$1,500 require approval by the Superintendent or designee.

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- E. Any out-of-state conference requires prior approval by the Governing Board. If prior board approval is not feasible, the Superintendent or designee may approve the request in accordance with the adopted budget.
  - F. No advances will be given. It is strongly suggested to utilize the Purchasing Department for all travel arrangements in order to avoid out-of-pocket employee expense.
5. Transportation reimbursement shall be guided by the following:
- A. Original legible itemized receipts for actual expenses are required when traveling by plane or ground transportation, to and from the conference site.
  - B. When authorized to travel by private automobile, reimbursement shall be at the approved mileage rate for every round trip mile, based on the shortest highway route. For a round trip of over 400 miles by private automobile, reimbursement shall be limited to the amount of round trip plane fare plus ground transportation, unless the automobile is the most practical means of travel.
  - C. Actual cost of airport ground transportation service and reasonable amounts for taxi/rideshare companies (Uber/Lyft, etc.) and parking are reimbursable. Expenses should be shared by conferees where possible. Original receipts should be obtained for reimbursement purposes.
  - D. Rental cars are only reimbursable if their need can be justified based on conference site distances, number of district conferees, etc. as the least expensive way to commute.
  - E. When utilizing rideshare companies (Uber/Lyft, etc.) reimbursement will be made by proof of a detailed printed receipt.
  - F. For employees driving directly from their home to an event and/or returning directly to their home, the mileage claim is limited to the mileage actually driven, using the shortest and most direct route, reduced by the normal mileage to and from work.

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6. Lodging expense
  - A. Lodging accommodations are to be made at hotels only. In no circumstance are homes or rooms to be rented through agencies such as Airbnb or Home Away/VRBO.
  - B. A detailed legible original receipt is required for all lodging.
  - C. The sharing of lodging expense is encouraged where possible.
  - D. Conferees should obtain reservations in the most reasonably priced hotels.
  - E. Lodging expenses will not be paid for any conference attendance within the local area unless the distance exceeds 75 miles or written justification is submitted with the conference request and approved by the Superintendent or an Assistant Superintendent.
  - F. Flights and lodging should be arranged to not incur additional meals and lodging for the day before and after the conference. Every attempt must be made to book a flight home the day the conference ends. Not following this procedure may cause out-of-pocket employee expense.

7. Registration

Registrations should be made with purchase orders. When a check is required for registration a purchase order should be used to generate the check. If an employee pays registration directly, reimbursement will be made upon completion of conference with valid receipts.

8. Meals

- A. When meals are offered at the conference, reimbursement will not be allowed. There is no per diem rate and all reimbursements must have original itemized receipts showing proof of payment. In group travel settings where individual credit card receipts are not allowed, reimbursement will be made to the cardholder only and limited to the below reimbursement rates for the appropriate number of employees. Alcoholic beverages may not be claimed for reimbursement. Meal reimbursement will be limited to the following rates:

Breakfast \$15  
Lunch \$16  
Dinner \$28

- B. Grocery receipts in lieu of restaurant meals are not acceptable for reimbursement unless prior approval has been obtained by the Assistant Superintendent.

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9. Accounting

- A. Form 50.21 "Reimbursement for Professional and Official Expenses" must be submitted within two (2) weeks from the date of the conference.
- B. Claims submitted after July 10 for the preceding school year will not be paid.

10. Violations

If there is any infraction of the policy above, including failure to obtain authorization of travel prior to travel date, reimbursement of expenses will be denied. In no circumstance should travel estimates be reduced in order to avoid board approval.

11. Granting Exemptions

For travel by the Superintendent and members of the Governing Board, the President or Clerk of the Board, as appropriate, shall act for the Superintendent for granting exemptions.

Authorized employees are specifically permitted to expend District funds and be reimbursed for meals purchased for non-district employees, such as visiting dignitaries, employees and/or representatives of other districts, elected officials or any other person provided such expenditures occur while the employee is engaged in his/her duties as an employee and in the furtherance of District interests.

Regulation approved: 1/13/87

Revised:

10/12/93

11/3/15

09/11/18

<b>PROFESSIONAL BUSINESS ATTENDANCE AUTHORIZATION REQUIREMENTS</b>	<b>LOCAL ADMIN. APPROVAL</b> (site and district project coordinator if special program funds involved)	<b>BOARD APPROVAL</b>	<b>SUPERINTENDENT/ ASSISTANT SUPERINTENDENT APPROVAL</b>
1. Substitute cost only/three days or less	X		
2. Local mileage (less than 100 miles, one way) and for parking fees only (use form 44.35)	X		
3. Professional business reimbursement costs, over \$1,500 per individual or transportation, registration, food, lodging, other miscellaneous expenses, or subs in excess of three days		X	
4. Professional business reimbursement costs, under \$1,500 for transportation, registration, food, lodging, other miscellaneous expenses, or subs in excess of three days			X
5. Services rendered to other entities whether completely paid for or reimbursable by the other entity			X
6. Attendance by another employee in lieu of one originally authorized by the Board (send memo to school business assistant)	X		
7. Change in date of attendance after Board authorizes (no additional days/send memo to school business assistant)	X		
8. Additional types of expenditures within amount authorized by Board	X		
9. Cost in excess of amount originally approved within 10% of total			X
<b>STAFF INSERVICE AND MEETINGS REQUIREMENTS</b>			
1. Purchase of food/beverages for all-day site meetings; food/beverages for evening meetings; meetings involving the public (non-employees) Note: Meetings involving district staff only must be at least four (4) hours long with an agenda and sign-in sheet in order to qualify for refreshments			X