

LAKE COUNTY SCHOOL DISTRICT TRAVEL EXPENSE GUIDELINES

There are times when travel is required in order for District employees to participate in meetings, events, professional development or training. While these trips serve a worthwhile function and are in service to the District's mission, it is critical that employees recognize that travel is a privilege. The following policies are designed to outline expectations for all District employees with regard to travel, and are intended to ensure that tax payer dollars are maximized and respected.

Approval for Travel

Employees wishing to attend functions, professional development or training opportunities on behalf of the District must secure approval from their immediate supervisor prior to making plans to attend. Employees must also turn in a District Travel Form (see below) to the district office in order to assist with making arrangements.

Travel Expense Policies

- District employees may reserve and use a District provided vehicle for group travel, if available. Reservation of a district vehicle should be done as soon as you know about the event, as vehicles are limited in number. Reservation is accomplished through the submission of a District Transportation Request Form turned in to Transportation Director (Joyce LaCome). Forms are available in the front office of each school or at the District Office.
- Employees may also choose to use their own vehicle and be reimbursed for mileage. The District will pay mileage with the expectation that employees attending the same function carpool in the least amount of cars possible. If an employee is selecting to take a vehicle that is outside of a provided carpool option, the mileage does not qualify for reimbursement. Official route mileage will be based on the shortest route as calculated at maps.google.com with the departure address being the street address of the employee's usual work site or the carpool meeting location and the arrival address being the street address of the hotel (for overnight travel) or the conference facility (for non- overnight travel).
- When an overnight stay is required, the District expects the employee to choose accommodation arrangements that are considerate and reasonable in cost. As an example, when multiple rates are available for a conference, the employee should remember that taxpayer or grant dollars are being used to fund such expenses, and the rate should reflect the district's values in selecting your accommodations.
- Employees will be reimbursed for meals on a per diem basis (see below). This reimbursement is based on the currently approved District Schedule and time of departure from and return to District. Employees leaving home prior to 7:30am are reimbursed for breakfast. Employees returning home after 7:30pm are reimbursed for dinner.
- Alcoholic beverages are never reimbursable. Employees paying for a meal using a district credit card should never include alcohol on the bill. Employees who violate this policy may have their District credit card privileges revoked.
- Employees on district travel may be accompanied by a family member or friend with prior approval and when the presence of the family member or friend will not interfere with the employee's successful completion of the objective of the trip. The District is not responsible for, nor shall it pay for at any time, any expenses incurred by or related to the employee's companion.

GUIDELINES FOR PAYING FOR TRAVEL

- The employee should maintain and submit copies of receipts for all expenditures. Regardless of the amount paid by the employee, meals are reimbursed based on approved District Schedule (see below). Meal receipts must be itemized. If a receipt is lost, employees must complete a lost receipt form.

- Employees should secure a tax exempt form prior to travel as the District will not reimburse for state hotel taxes.
- In order to receive reimbursement, employees must complete a District Reimbursement Form. Employees requesting reimbursement for travel should submit receipts in a timely manner, but no later than 30 days after the date of the travel. Receipts submitted after that time may not be reimbursed.
- District employees may choose to cover their own mileage and meal allowances and be reimbursed, or to receive an advance.
- If an advance is desired, the employee should make sure that these requests are made at least two weeks prior to allow sufficient time to generate the requested check. If such request is not made two weeks prior to travel, the business office will reimburse the employee for his/her expenses in the next check run following the return of appropriate travel receipts. If an advance is made by the District, the advanced funds shall only be used for the purpose for which the advance was made, and that any unspent funds from the advance must be repaid to the District.
- All employees must complete a District Reimbursement Form to document any travel-related expenses.

Lake County District per Diem Meal Allowance, Lodging Allowance & Mileage Schedule, 2022-23

Meals are reimbursed up to the following rates on a per diem basis. Amounts turned in for reimbursement over this amount will not be reimbursed; amounts turned in over these amounts via a district credit card will need to be reimbursed to the district:

Breakfast: up to \$12.00

Lunch: up to \$18.00

Dinner: up to \$30.00

Mileage is reimbursed at \$.625 per mile.

- **Violation of any of these policies may be grounds for disciplinary action, up to and including termination.**

LAKE COUNTY SCHOOL DISTRICT TRAVEL FORM

Please turn in this form ASAP but no later than three weeks before your trip.

Employee Name: _____

Today's Date: _____

Name of Event / Conference / Training: _____

Link to registration: _____

First Day of Event & Start Time: _____

Last Day of Event & End Time: _____

Location of Event _____

Other staff going with you? _____

Do you need a substitute for the days you are gone? YES NO

If yes, please input this into AESOP and use PD as leave type

Travel to event (circle): District Vehicle Personal Vehicle Plane Combination

Please explain any details we might need related to your travel: _____

If you are using a district vehicle, please also submit a Transportation Request Form. If you are taking your personal vehicle, please see above for carpooling recommendations.

If you are traveling by plane:

What is your full legal name? _____

What is your date of birth? _____

What dates will you need a flight? _____

Lodging: When an overnight stay is required, the District expects the employee to choose accommodation arrangements that are considerate and reasonable in cost. If you are attending with another staff member, are you willing to share a room? If so, with whom _____

Name of Event Hotel (if applicable): _____

Meal expenses: *Meals may be reimbursed up to the per diem amount. Employees may pay for meals and be reimbursed, or request an advance.*

I request an advance.

I do not request an advance.

Updated: 8/22/2022t