

Tuba City Unified School District # 15

Travel Policy

1. PURPOSE

The purpose of this policy is to establish procedures for authorization of travel by Tuba City Unified School District (TCUSD) employees, officials, or agents who may be required to travel in fulfilling their official duties or in attending seminars, conferences or other professional or educational activities benefiting the District.

2. APPLICABILITY

2.1 This policy applies to:

2.1.1 All district employees, officials, or agents who travel on District related business, regardless of which District entity funds the travel expense.

2.2 This policy does not apply to:

2.2.1 Consultants who are hired to travel to TCUSD to train employees on District premises. Purchase orders are to be used to retain the services of such presenters.

3. GENERAL INFORMATION

It is the general intent of the TCUSD to fund or reimburse employees, officials, or agents for actual which are approved through the District travel authorization process. Travel expenses related to pre-allocated budget allowances will be reimbursed up to the amount of the budget allotment. Reimbursements enumerated in this policy are intended to pay for job related employee, official or agent expenses only.

3.1 This policy applies to all employees, officials or agents travel to conferences, conventions and travel undertaken for execution of District business. This includes, but not limited to:

3.1.1 Travel requiring an overnight stay;

3.1.2 Conventions and conferences when no overnight stay is required; and

3.1.3 Events held within the District boundaries which are conducted by a person or entity other than District.

3.2 Reimbursement rate set for mileage, lodging, meals and incidental will be reimbursed according rates set by Arizona Department of Administration.

3.3 Building Administrators are to reaffirm the importance of being in the classroom first.

3.4 This travel policy does not permit employees', officials', or agents' family members, friends or other travel companions must be paid directly from the personal financial resources of the employee, official or agent without being intermingles with District financial transactions.

4. Travel Request Process

- 4.1 When a staff member requests to attend a workshop, a conference or staff development activity, they are responsible for all costs, except for the cost of a registration and substitute teacher.
- 4.2 When an administrator; recommends to the Superintendent, directs a staff member to attend a workshop, then the administrator, through their resources, pays for all costs relating to the trip. Said costs are to come from monies budgeted for travel obtained through grants and/or federal programs. Maintenance & Operation funds may be used only after other options are exhausted, and if monies have been budgeted for such travel.
- 4.3 Participation in all workshops, conference or staff development activities must be justified in writing as to how it will assist in the improvement of classroom instruction and the benefits to our students. This justification is to be made to the immediate Supervisor/Administration.
- 4.4 Travel authorization must conform to the goals and objective of the district, or the program.
- 4.5 Request for travel must be submitted to the immediate Supervisor/Administration four weeks prior to travel, three weeks to the District Office and two weeks to Transportation. All out-of-state travel must be approved by the Governing Board prior to leaving. Twenty five miles from the state line is considered out-of-sate for the purposes of this policy. Emergencies will be treated on a case by case basis. Travel requests, requisitions, conference brochures and justification will accompany all requests.
- 4.6 Single day travel is authorized by the immediate Administrative Supervisor. The request need not go to the Superintendent unless a vehicle or money is requested.
- 4.7 Out-of-state travel will be scrutinized by the Superintendent. If perceived by the Superintendent that out-of-state travel is reaching excess levies, authorization for travel my be denied.
- 4.8 Do not make any travel reservation that cannot be cancelled until final approval of the travel request has been received from the business office.

5. PAYMENT OF TRAVEL EXPENSES

Travel expenses are to be paid as follows:

- 5.1 Upon return from conference, workshop, or a staff development activity, staff will complete and submit "Workshop/Conference Completion Form" to the immediate Supervisor/Administration. This form is to be completed within five (5) working days and attached to the travel reimbursement form. The brief report to the Supervisor/Administration should have event you attended, including name of speaker, information of importance that was received, implication for the District, etc., and the Supervisor/Administration will include this in their monthly report to the governing board.
- 5.2 Travel request will not be processed at the District Office if incomplete and if the immediate Supervisor/Administration signature is missing. Incomplete requests/requisition will be returned to the Principal/Supervisor.
- 5.3 Purchase orders are to be used to pay expenses related to conferences or workshop.
- 5.4 All travel expense documentation is to be submitted to the District Office for reconciliation purposes within five (5) days following the conclusion of the conference.

- 5.5 If a traveler fails to document travel expenditures or make reimbursement to the District for travel expenses within thirty (30) days of the conference ending date, the District reserves the right to deduct the undocumented expenditure amounts and/or the reimbursement amount from additional travel reimbursement without additional notice.
- 5.6 If the District is due to be reimbursed by a traveler, the traveler is expected to include the reimbursement payment with the documentation materials when they are forwarded to the District Office.
- 5.7 If the traveler is due to be reimbursed by the District, that amount will be paid within fourteen (14) days of receiving valid and reconciling travel documentation materials.

6. TRAVEL EXPENSES

Per Diem

- 6.1 Per Diem expenses are approved for all days a conference is in session and all additional travel days, when approved through the travel request process.
- 6.2 Reimbursements for Per Diem will not be allowed if costs are included in total conference costs.

Lodging

- 6.3 Hotel accommodations are approved for the number of days a conference is in session, less one.
- 6.4 Travelers shall secure hotel accommodations at a daily rate which is approved according to ADOA travel reimbursement schedule.
- 6.5 Hotel accommodations will be funded only once per conference.
- 6.6 Hotel designation payments will not be paid when hotel accommodations are included as a portion of the conference approval from an administrator.
- 6.7 Hotel expenses will not be paid by TCUSD for conferences which are less than 100 miles from TCUSD without prior approval from an administrator.

Transportation

- 6.8 Air transportation is limited to air coach or tourist class. When special and reduced fares are available, they should be secured unless doing so will leave the District at risk because of the loss of insurance coverage or unduly open the District to the potential of financial damage.
- 6.9 When air transportation is approved, a ground transfer allowance is provided for taxi or van service, and parking of personal vehicles at transportation terminals.
- 6.10 Personal Private owned vehicles will be approved for mileage reimbursement only if TCUSD Transportation has no vehicles to be assigned to a particular trip.
- 6.11 When travelers are approved through the Travel Request Process to drive personal vehicles to a conference, the total mileage reimbursement will be an amount which will not exceed the cost of airfare, had it been available and used. When airfare is less than mileage reimbursement, travelers are encouraged to arrange air transportation.

- 6.12 Mileage is calculated from the District office to the destination and back. Reimbursement will be made using the prevailing per-mile reimbursement rate set by the ADOA. Locations not included on the table will be calculated using exact mileage.
- 6.13 District travelers driving District owned vehicles to conference will not receive mileage reimbursement. These travelers are expected to arrange to use a District gas card for fuel and other vehicle expenses incident to the conference travel. When exceptional circumstances require a traveler to expend personal funds for District vehicle operational expenses, the travelers will be reimbursed upon presentation of valid expenditure documentation which has been approved by the site administrator.
- 6.14 Rental cars are not allowed without prior approval. All requests for rental cars must be included in the District travel authorization.
- 6.15 When rental cars are approved, only actual documented expenses will be funded or reimbursed by the District.

7. EXCESSIVE CHARGES

The District will not fund any travel expenses which are unrelated to the approved travel purpose. District travelers will be required to reimburse the District for travel charges which are unrelated to the travel purpose or which are determined to be excessive.

Document History

Revised: April 19, 2010