

**CLASSIFICATION: Business and Noninstructional
Operations****ADOPTED: 9/1/85****REVISED: 5/23/01****SUBJECT: Travel, Conference, Convention, or
Meeting Expense, Reimbursement****PAGE: 1 of 5**

It is the intention of the County Superintendent of Schools to reimburse staff members for expenses which are incurred as a result of assignment on official business. Reimbursement for actual and necessary expenses incurred must be within limits set by this administrative regulation.

The Internal Business Services Section and the San Diego County Office of Education's designated travel agent will provide travel coordination in areas of airline ticketing, hotel reservations, and related services to staff members traveling on official business.

Form 43, *Activity Authorization and Claim Form*, shall be completed for all out-of-county activities and only those in-county activities when costs will be incurred. This authorization form should provide detailed information as a basis for approval.

OUT-OF-COUNTY TRAVEL

1. Reasonable expenses may be claimed in accordance with established general guidelines for prior authorized activities.
2. An advance of funds may be authorized when total trip expenses are estimated to exceed one hundred dollars (\$100.00). An advance can be issued for less than the total trip expense.
3. Car rental shall have prior authorization.
4. Advance conference registration may be paid when authorized. Reimbursement to the San Diego County Office of Education for nonattendance to a prepaid activity is the responsibility of the staff member.
5. Airline tickets should be of least cost and are usually purchased through the designated travel agent. If circumstances make it necessary for a staff member to make his/her own travel arrangements and purchase tickets from other than the designated travel agent, prior approval must be obtained from the division assistant superintendent.

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6. Deposits for hotel accommodations shall be the responsibility of the staff member.
7. When the travel costs relating to state or other agency activity are to be reimbursed by that agency, the staff member shall identify the outside agency/organization to be billed in the remarks section on Form 43, *Activity Authorization and Claim Form*. The staff member's section/unit shall obtain reimbursement from that agency. The Internal Business Services Section will assist with the billing when requested. Any difference between the actual travel cost and the amount reimbursed by the agency will be paid by the San Diego County Office of Education.
8. Staff members shall submit claims on the claim portion of Form 43, *Activity Authorization and Claim Form*, for approval and payment within thirty (30) days following the date of completion of the activity.

IN-COUNTY TRAVEL

1. Reasonable expenses, including registration fees and conference-connected meals, may be claimed for prior authorized conferences requiring registration and held within San Diego County.
2. Reasonable hotel expenses may be claimed for prior authorized conferences when the situation merits accommodation and lodging is approved in advance.
3. The cost of meals in connection with authorized attendance at activities within San Diego County may be claimed.
4. Staff members shall submit claims on the claim portion of Form 43, *Activity Authorization and Claim Form*, for approval and payment within thirty (30) days following the date of completion of the activity.

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GENERAL GUIDELINES

1. Travel is normally approved by the division assistant superintendent. The County Superintendent of Schools shall approve all out-of-state travel and division assistant superintendents' travel.
2. The President of the County Board of Education shall approve all travel for the County Superintendent of Schools.
3. Time authorized for out-of-county travel should be the shortest possible to complete conference or other approved activity.
4. Expenses are expected to be necessary and reasonable with the provision that accommodations may be in the conference headquarters hotel.
5. Rooms should be shared with appropriate personnel whenever possible.
6. The maximum meal cost reimbursement rates shall be the same as the rates approved for staff members of the California Department of Education. San Diego County Office of Education rates will be adjusted to correspond with California Department of Education rates within thirty (30) days of official notice of any change in California Department of Education rates. The Director of the Internal Business Services Unit shall immediately notify staff of changes in reimbursement rates.

For travel that occurs for only a portion of a day, the cost of meals will be reimbursed provided the approved travel time meets the following requirements:

Breakfast: Reimbursement may be claimed if travel begins by 6:00 a.m. and ends after 9:00 a.m.

Lunch: Reimbursement may be claimed if travel begins by 11:00 a.m. and ends after 2:00 p.m.

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Dinner: Reimbursement may be claimed if travel begins by 4:00 p.m. and ends after 7:00 p.m.

7. The cost of meals served in connection with special events or programs that exceed maximum meal cost reimbursement rates shall be reimbursed with an actual receipt. Identify the specific meal, (i.e., banquets, special luncheons, meetings, etc.) with an "M" on the claim portion of Form 43. Meals included in a registration fee are not reimbursed separately.
8. No public funds may be expended on the purchase of alcoholic beverages.
9. If a staff member's vehicle is authorized for occasional and incidental travel*, in lieu of airfare or fifty percent (50%) of the mileage reimbursement rate, whichever is less, may be claimed as determined by prior approval.
10. Ground travel should be arranged so that the most number of staff members can be accommodated with the fewest number of cars.
11. Considering time factors, air transportation is generally preferred.
12. The actual cost of airport parking shall be reimbursed for a maximum of five (5) days with the following limits:
 - First Day: Not to exceed the full first-day parking rate at San Diego International airport.
 - Second to Fifth Successive Day: Not to exceed fifty percent (50%) of the second-day parking rate at San Diego International Airport.
13. The actual cost of bus/taxi/limousine/shuttle service used to access the San Diego International Airport shall be reimbursed round-trip not to exceed the total amount allowed for parking in General Guidelines, Item 12.

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14. The actual cost of all airport bus/taxi/limousine/shuttle service used while out-of-county shall be reimbursed. Public transportation should be used when available and convenient.
15. Receipts are required for reimbursement of the following expenses: car rental, parking, excess meal costs, lodging, plane fare, registration, and all taxi/bus/limousine/shuttle service.
16. Reimbursement is not allowed for tips or baggage handling.

*Occasional and incidental travel is that circumstance when a staff member is required to use his/her personal car in lieu of a fleet vehicle for transportation to activities that are not part of his/her ongoing field assignment.

Derivation: Former Administrative Regulation No. 3100, Adopted 9/1/85. Amended 11/1/89, 10/1/90, 6/24/94. Amended, Renamed, and Renumbered 3542, 9/13/95. Amended 5/23/01.

Board Policy No.: 3540

**Legal Reference: Education Code
1081, 32435**