

Belmont-Redwood Shores School District

Travel Expense Procedures

The Belmont Redwood Shores School District Superintendent or designee may authorize payment for actual and necessary expenses incurred by an employee performing authorized services for the District in accordance with the limitations below.

General Guidelines

- Employees are expected to travel in the most direct and economical manner. Travel reservations should be made by District staff with experience in making cost effective travel plans.
- Travel plans must be made without consideration of potential mileage, credit, or other benefit to the employee.

Lodging

Employees on approved travel requiring overnight lodging will be reimbursed for the actual and necessary lodging expenses, not to exceed the rate of single occupancy lodging, supported by appropriate receipts.

Meal and Gratuity Allowances

- Employees on approved overnight travel shall be provided the following meal and gratuity allowances.

Breakfast.....	\$15.00
Lunch.....	\$20.00
Dinner.....	\$35.00

- Subject to prior approval by their supervisors, employees attending meetings or professional development programs beyond the boundaries of San Mateo County shall be provided a \$20.00 lunch meal and gratuity allowance if lunch is not included as part of the meeting or professional development program.
- Allowances are per meal, not per diem, and balances may not be applied to prior or subsequent meals.
- Reimbursement requires submission of the *Travel Expense Claim Form* and **itemized** receipts. (Credit card receipts without itemization are not sufficient for reimbursement.)
- **Employees will not be reimbursed for the following:**
 - Alcoholic beverages
 - Any meal that is included as part of a meeting, conference, etc. For example, if a conference offers a continental breakfast at no additional charge, the employee will not be reimbursed for breakfast.
 - Tipping in excess of 15% of the total check, unless it is a mandatory addition to the bill
 - Food purchased for non-employees, unless approved in advance by the Superintendent or designee
 - Non-itemized or lost receipts

Transportation

- Mileage Reimbursement
 - Employees may use their personal automobiles for District business.
 - Employees shall be reimbursed for the use of their personal automobiles when used on District business.
 - Mileage reimbursement shall be at the current rate established by the Superintendent or designee. Individuals who receive a monthly mileage stipend will not receive additional reimbursement for travel within San Mateo County.
 - All claims for mileage reimbursement shall be submitted on *the Mileage Reimbursement Form*. A separate form should be prepared and filed for each calendar month.
 - Employees will be reimbursed for mileage only between points of official business. Reimbursable mileage when travel originates or ends at home shall be determined by the following formula:

$$\text{Total Mileage} - \text{Round Trip Home-to-Work Mileage} = \text{Reimbursable Mileage}$$
 - Employees will be reimbursed for actual and necessary parking expenses and tolls. Employees should submit receipts for such expenses with their *Mileage Reimbursement Forms*.
- Carpooling
 - The District strongly encourages carpooling whenever it is practicable for employees to travel together on District business.
- Rental Cars
 - Employees shall use rental cars only in cases where commercial transportation is unavailable, too costly, or impractical. Prior approval for the use of rental cars shall be obtained from the employee's supervisor.
 - The District maintains insurance that covers employee use of rental cars for District business. Consequently, employees should waive insurance offered by the rental company when entering into the rental agreement.
 - The itemized rental agreement shall be submitted with the *Travel Expense Claim Form*.
- Other Forms of Transportation
 - Employees shall obtain prior approval from their supervisors when using forms of transportation other than automobiles, e.g., bus, airplane, taxi, or railroad.
 - These forms of transportation will be allowed at the lowest public carrier rate available, considering the scheduling and service for the destination.

- **Travel Cost Reimbursement Documentation**

- Reimbursement claims shall be prepared on the *Travel Expense Claim Form*, and are subject to approval by the employee's supervisor and the Superintendent or designee.
- The *Travel Expense Claim Form* must include an itemization of expenses and be accompanied by necessary receipts. (Credit card receipts without itemization are not sufficient for reimbursement.)
- Original copies of receipts for meals, transportation and lodging are required, even if payment has been made by the District via warrant, purchase order, or District credit card.
- Employees must also submit receipts and ticket stubs (e.g., original copies of airline tickets, railway tickets, etc.) for travel expenses where the District has made direct payment.
- All claims for reimbursement should be submitted on a monthly basis, but in no case later than the end of the month following the month in which the expenditure was incurred.