

**CONECUH COUNTY BOARD OF EDUCATION**  
**TRAVEL POLICY**  
(Effective August 1, 2018)

**I. PURPOSE:**

The purpose of this policy is to establish consistent and reasonable guidelines, to ensure the most efficient use of the district's financial resources, as it relates to business-related travel and the reimbursement of associated expenditures, for employees of the Conecuh County Board of Education and consultants employed by the school district.

**II. OBJECTIVE:**

- A. Ensure that all employees and consultants (traveler or employee) employed by the school district understand the policies and procedures for business-related travel.
- B. Traveler will incur and report actual travel expenses in a responsible and ethical manner and make choices that demonstrate good stewardship of the district's resources.

**III. RESPONSIBILITIES:**

- A. Individual programs areas may, at their discretion impose greater control than is required by this policy, but never less.
- B. The traveler is responsible for complying with the established travel policy. The traveler approving authority is responsible for accurately reviewing the travel reimbursement request for compliance.
- C. The district will reimburse a traveler for all ordinary and necessary out-of-pocket expenses while traveling on official district business. The district assumes no obligation to reimburse a traveler for expenses not in compliance with this policy or that are not filed in a timely manner.
- D. Under no circumstance should personal travel expenses be charged to or temporarily funded by the district.

**IV. GENERAL INFORMATION:**

- A. In-system travel is travel inside the school district or Conecuh County. Out-of-town travel is considered travel outside of the school district or Conecuh County. Out-of-state travel is any travel outside the state of Alabama.
- B. Do not book packages that bundle airfare, hotel, and/or other trip expenses unless you confirm, prior to travel that an itemized receipt for each type of expense will be provided.
- C. Travel requests for professional development and/or professional leave should be limited to events that are directly related to your position, job duties and/or responsibilities. Traveler should be prepared to provide an explanation if necessary. Travel requests that do not relate meet this requirement will not be approved.

## **V. TRAVEL ADVANCE OR PRE-PAYMENTS:**

Advance or pre-payments are allowed for registration fees only, to allow travelers to take advantage of “early bird” or discounted registration rates, which optimizes savings for the district. If the traveler wishes to take advantage of the pre-payment option for registration, a completed Request for Pre-payment of Registration Form must be completed.

- A. A requisition is required to be submitted in CCSEforms, attaching the completed Request for Pre-Payment Form, an approved Professional Leave or Professional Development form, and supporting documentation.
- B. All requests for advance registration payments should be submitted and approved at least two (2) weeks prior to departure.
- C. In the event of a cancellation, the traveler must notify the Board, so pre-paid charges can be refunded. Failure of notification will result in the traveler assuming responsibility of all pre-paid charges. Reimbursement of pre-paid charges, should occur within sixty (60) days of liability notification.

## **VI. OUT-OF-STATE TRAVEL**

- A. All out-of-state travel is restricted and must be mission critical to the district and inherent to the traveler’s job duties. An agenda, brochure or some other form of documentation to substantiate the need for travel, must be submitted with leave request form.
- B. Examples of mission critical or allowable out-of-state are as follows:
  - 1. Travel involving certification or licensure requirements and there is not any in-state training available in the necessary timeframe.
  - 2. Travel necessary to fulfill requirements of grant funding and/or other contractual agreements.
  - 3. Traveler has a direct leadership and/or major participating role in the event (must be explained ahead of time and in detail when submitting request)
  - 4. Travel has major public safety or vital policy implications for the district (must be explained ahead of time and in detail when submitting request)
- C. Travelers should be limited to the most essential. The number of travelers permitted to travel to trainings, conferences, etc., will be decided on a case-by-case basis, however in most cases not more than two (2) employees should need to attend an event that is not required for certification or to satisfy grant or contractual requirements.
- D. The traveler attending trainings, conferences, etc., can provide the necessary information to other district employees.

## **VII. TRAVEL REIMBURSEMENT**

- A. **All travel expenses will be on a reimbursement basis only.** Travelers may use a personal credit card or charge account for travel purposes and obtain reimbursement from the district.
- B. A CCSEforms for Professional Leave and/or Professional Development must be submitted and approved prior to departure for meetings, conferences, seminars, etc.
- C. Each traveler anticipating generating reimbursable and/or pre-paid expenditures, must submit their own Professional leave/Professional development request, regardless of other travelers or attendees.
- D. All travel reimbursement request for travelers must be submitted and approved in CCSEforms.
- E. Travel reimbursement requests must have the following attached, if applicable:
  - 1. Registration (if not pre-paid)
  - 2. Itemized Meal Receipts (15% gratuity limit; no receipts required for overnight travel)
  - 3. Lodging or Hotel
  - 4. Airline Tickets (Coach Class Only)
  - 5. Mileage for personal vehicle (mileage documentation required for out-of-town mileage)
  - 6. Parking Fees (official dated receipts)
  - 7. Baggage & Handling Fees (dated receipts)
  - 8. Uber/Taxi/Shuttle Fees (dated receipts, destination and amount)
  - 9. Telephone/Internet Charges (official/dated receipt required)
  - 10. Other Miscellaneous Expenses (discretionary)
- F. All approved forms must be received by the Central Office no later than 30 days following the travel end date. Incomplete reimbursement requests will be returned. All travel reimbursements will be mailed to the address on file. At no time will travel reimbursements be allowed to carry over into the subsequent fiscal year.

## **VIII. UNAUTHORIZED EXPENSES:**

- A. The Board of Education will not reimburse a traveler for alcoholic beverages, snacks, personal supplies, rental cars, limousine services or entertainment.

## **IX. MILEAGE**

- A. Travel in a personal vehicle will be reimbursed at the current mileage rate designated by the State of Alabama. The mileage rate usually changes in January of each year.
- B. Travelers are encouraged to use system vehicles, when available. If a system vehicle is unavailable, traveler may be reimbursed for business miles traveled in a personal vehicle at the established or standard mileage

rate, as prescribed by the Internal Revenue Service. Rental cars are prohibited. If a rental car is utilized the traveler will only be reimbursed the cost of mileage, as if their own personal vehicle was utilized.

- C. Reimbursement is for point-to-point mileage only and is paid from the traveler's base or home, whichever is closer. For out of county travel, travelers are required to submit a printout from Google Maps, MapQuest, Yahoo Maps, etc... verifying mileage driven. Mileage will not be reimbursed without proper documentation.
- D. Vicinity or area mileage, necessary for conducting official district business is allowable, but must be shown separately.

**X. MEAL ALLOWANCE:**

- A. Travelers may be reimbursed the actual costs of meals within the maximum established limits. A gratuity of up to fifteen (15%) percent may be included; however, it must be added to the costs of the meal. The following meal limits apply:
  - a. Daily travel with no overnight stay - \$15.00/daily
  - b. Overnight travel meal per diem - \$35.00/daily
- B. A dated itemized meal receipt is required to claim the daily meal allowance (\$15 maximum).
- C. A dated itemized receipt is NOT required to claim the overnight per diem (\$35 daily). Expenses in excess of the per diem limit will not be reimbursed.

**XI. HOTELS/LODGING:**

- A. Traveler must be at least fifty (50) miles from assigned base (cost center) or home, whichever is closer, to be reimbursed for an overnight stay, unless the stay is required to meet a business need (i.e. an event requires you to be onsite for late night or early morning setup).
- B. Travelers must arrange all travel and are expected to utilize negotiate or preferred rates, if possible.
- C. Cost associated with internet usage for business reasons is reimbursable.
- D. In-room meal charges or room service must be itemized separately, so that lodging and meal charges are listed separately.
- E. In-room meal charges should be itemized separately on an expense report, so that hotel and meal charges are captured separately.

**XII. AIR TRAVEL:**

- A. Travelers are expected to use the lowest logical airfare at the time of the booking. Airline travel will be limited to Coach Class only.
- B. Personal upgrades utilizing personal miles or coupons can be used to upgrade to first class, or a traveler may opt to pay personally for the price difference between coach and first class. The additional cost incurred

WILL NOT be reimbursed and participation in these programs must not influence flight selection, which would result in incremental cost to the district, beyond the lowest available airfare, as defined in this policy.

- C. A receipt for the paid airfare and a ticket stubs must be attached to the travel claim when seeking reimbursement. \*Note: If an alternative means of transportation is chosen, the limit of reimbursement shall be no more than the mode of transportation that is economical. \*

### **XIII. ITINERANT TRAVEL:**

- A. All in-system itinerant travel should be conducted in a system vehicle, if possible. Any exception or deviation must be approved by the Superintendent. Failure to obtain approval will result in travel reimbursements being denied. In the event of exceptions or approvals granted by the Superintendent, the following will apply: An employee/traveler assigned to teach classes at two or more campuses (example – mornings at one campus, afternoons at the second campus which requires automobile use) may claim one-way mileage for travel between campuses. Employees/travelers may not claim mileage when they are assigned to work all day at different schools or work sites on alternate days (example – Mondays at one school, Tuesdays at a second school, or any like combinations). Certified employees, with the exception of School Administrators, traveling on a continuing basis from school to school or work site to work site to conduct the activities associated with their jobs shall be paid mileage.

### **XIV. OTHER PROVISIONS:**

- A. The Superintendent may authorize exceptions to the provisions set forth if he/she deems the exceptions necessary to meet the needs of the School Systems operations. School Principals or Supervisors, accompanied by an explanation of the circumstances that justify the need for making the exception, will request the Superintendent's authorization of exceptions in writing.
- B. School Principals are permitted to reimburse school employees for actual travel expenses while such employees are conducting school business. All local school travel reimbursements must follow the district travel guidelines, as explained above. Failure to comply with district guidelines may result in discipline action. All travel expenses for Principals that are to be paid out of school funds must first be approved by the Superintendent.
- C. All consultants hired by the Board will be required to follow the guidelines set forth when requesting reimbursements
- D. All transport and homebound travel approved by the Board will be required to follow the guidelines set forth when requesting reimbursements.

- E. If at all possible, employees traveling to the same location, for the same purpose should carpool and share lodging. It is also the employee's responsibility to ensure that the applicable forms and receipts are submitted for reimbursement.
- F. Mileage reimbursement is for point-to-point mileage only and is paid from the employee's base or home, whichever is closer. For out-of-town travel, employees are required to submit a printout from Google Maps, MapQuest, Yahoo Maps, etc... verifying mileage driven. Mileage will not be reimbursed without proper documentation.
- G. Fully approved travel reimbursements requests will be processed in the due course of business. The district will make every effort to process fully approved travel claims within two (2) weeks. However, there may be times when, due to absences, closures, weather days, etc. this is not feasible

Conecuh County Board of Education  
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**REQUEST FOR PREPAYMENT OF REGISTRATION FEE**

Date:

Make Check Payable to:

Person Attending:

Event Name:  
Conference, Training, Workshop, etc.

Event Location:

Event Dates:

Registration Fee:  
Official Documentation Required

Additional registration fees must be  
entered on separate form

Funding Source:

I, the undersign, agree to notify and reimburse the Conecuh County Board of Education the entire cost of the registration fee should I not be able to attend for any reason, other than no fault of my own. I the undersign, also agree to reimburse the District all pre-paid registration fees, within sixty (60) days of liability notification.

Signature of Person Attending Event: