**Cecilia A. Massetti, Ed.D.**
*Superintendent of Schools*

**8.7**

# Board of Education Action Item
## July 10, 2018

**Topic:**
Travel Policy MCOEP 3241 and Administrative Regulations

**Background:**
Periodically the Travel Policy is reviewed. The current changes in the policy:
- Clarification to the use of personal vehicles
- Formatting to match the agreed upon format for policies

**Fiscal Impact:**
None

**Resource:**
Cecilia A. Massetti, Ed.D.
Superintendent of Schools

**Recommendation:**
It is recommended that the Madera County Board of Education adopt the revised Travel Policy MCOEP 3241 and the Administrative Regulations.

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# 3000 BUSINESS

## 3200 – TRAVEL

Travel Policy MCOEP 3241

The Madera County Superintendent of Schools (MCSOS) and the Madera County Board of Education recognize that participation in and attendance at meetings and other events such as seminars, workshops, and conferences is a primary means of gathering information and affording employees and board members the opportunity to update necessary skills and to network with other professionals. The objective of the meeting or other event will be determined to relate to the objectives and mission of the office of the Madera County Superintendent of Schools or the employee's profession and be relevant to the employee's responsibilities or technical capabilities. This policy pertains to travel and to attendance at meetings and other events, as well as to administrative regulations regarding obtaining reimbursement for travel expenses for employees of the Madera County Superintendent of Schools and members of the Madera County Board of Education. Every effort will be made to ensure that arrangements for travel and attendance at events will be made in the most cost-effective manner possible.

| LEGAL REFERENCE |
| --- |
| EDUCATION CODE<br>44032 Travel Expense Payment<br>44033 Automobile Allowance<br>44576 Remuneration of Trainees |

Revised: August 14, 2001
Revised: July 14, 2009
Revised: December 14, 2010
Revised: July 10, 2012
Revised: February 10, 2015
~~Revised: May 8, 2018~~
Revised: June 12, 2018
Revised: July 10, 2018

Travel Authorization

All travel is subject to authorization by the Superintendent, or other designated administrator. Such authorization is based on specific information as to the nature of the business and the travel requirements. The objective of the meeting or other event will be determined to relate to the objectives and mission of the office of the Madera County Superintendent of Schools or the employee's profession and be relevant to the employee's responsibilities or technical capabilities.

Authorization means approving travel in advance and, when travel is completed, the claim for reimbursement of travel expenses. Persons authorized to approve travel claims must ensure that all claims are reviewed, prior to approval. By endorsing the reimbursement claim form, the approving person accepts the responsibility for its completeness, accuracy, and validity.

Advance payment of approved travel expenses may be requested by the employee. The proper forms must be submitted to the Business Office at least ten working days prior to the departure.

Request for Travel

All requests for attendance at meetings, workshops, seminars, conferences, or out-of-county travel must be submitted to the Superintendent or designated administrator ten working days in advance on the approved "Travel Request" form.

If expenses are to be paid by or reimbursed by an agency other than the office of the Madera County Superintendent of Schools, this fact and pertinent arrangements must be noted as to how payment or reimbursement is to be handled.

If travel requests are denied, the administrator or supervisor will explain the reason for denial. At the discretion of the Superintendent or designated administrator, the employee may be allowed to attend a conference by using vacation time, compensating time off, or unpaid leave and incurring
at his/her own expense all the costs of attending the event. Optional attendance at events that occur on weekends and/or evenings does not entitle classified employees who are not exempt from overtime to additional or overtime pay.

Blanket advance approval may be requested by employees who know they will be attending meetings of a specific group on a continuing basis. The blanket advance approval procedure has been devised to facilitate the work of the staff but not to liberalize existing criteria for travel.

## Transportation

Representatives of the Madera County Superintendent of Schools and the Madera County Board of Education are responsible for ensuring that they use the most economical method of transportation at all times, taking into consideration both the cost of the mode of travel and staff time involved. Carpooling is encouraged and may be required by the Superintendent or designated administrator.

### Use of County Cars and Rental Cars

The office of the Madera County Superintendent of Schools maintains a small pool of vehicles which may be used for business travel. Employees transporting pupils in County vehicles must possess a valid Class III California Driver's License; only MCSOS employees are allowed to drive County vehicles.

The program incurring the travel expense will be charged the current IRS rate per mile for use of a county car. The office of the Madera County Superintendent of Schools also maintains a contract with a rental car company which provides reliable vehicles at a low cost primarily for out of county travel. When assigned a rental car, the program incurring the travel expense will be charged the actual rental cost and the cost of fuel. Employees should request the use of a county car or rental car before using their personal cars for out of county travel. Employees who elect to use their personal cars in order to travel must have prior approval and will be reimbursed at the IRS mileage rate. Family members and friends of employees who accompany employees for business travel shall not ride in County vehicles or vehicles rented by the office of the MCSOS.

Vehicle request forms are available on the Intranet and by request from Operations. Vehicle requests should be made at least ten days in advance, when possible. The request will be evaluated for county or rental car assignment, taking into consideration the date(s) requested, the destination, and other scheduled use of available county cars. A travel log sheet is provided when a county car or rental car is assigned and must be completed by the operator of the car each time the vehicle is assigned. Upon completion of the trip, the operator is to fill the car with gas in accordance with the instructions provided on the travel log sheet. The operator is to turn in the car keys, travel log sheet, and gasoline credit card(s) upon completion of the trip. County vehicles are cleaned and checked on a regular basis; however, if a vehicle has a condition requiring attention from Maintenance staff that should be reported on the travel log sheet when it is returned.

### Use of Personal Cars

If it is authorized by the Division Administrator/Supervisor for the employee to use his/her personal vehicle, the employee shall be reimbursed based on the approved IRS rate. ~~determined that a county car or rental car is not available, or not economically advantageous, a notation to this effect will be made on the "Travel Request" form, authorizing mileage reimbursement at the IRS rate for use of a personal vehicle.~~

If a personal vehicle is used to conduct approved work-related activities (including out of county travel) and a collision occurs, the employee's personal insurance policy is primary and the office of the Madera County Superintendent of Schools' insurance policy is secondary. Once all benefits have been exhausted by the employee's primary insurance policy, the office of the Madera County Superintendent of Schools insurance carrier may cover additional expenses subject to the insurance carriers determination. Details of the accident (including date, time, location, circumstances, etc.) must be reported to Operations and the employee's immediate supervisor as soon as possible but no later than the next work day. Any mechanical problem, broken windows, dents, scratches, or other such damage unrelated to a collision will be the sole responsibility of the employee and/or the employee's personal insurance policy.

Transportation of Pupils in Personal Cars & County Vehicles

Employees are not to provide transportation in their personal cars to pupils, unless that person is employed as an "Instructional Assistant – Transporter".

Instructional Assistant – Transporters must provide the Madera County Superintendent of Schools with a Certificate of Insurance from their insurance carrier indicating that their minimum levels of coverage are at the "standard rate". The employee's insurance is primary when the personal vehicle is used in the Instructional Assistant – Transporter's line of duty.

Aside from Instructional Assistant – Transporters, employees are not to transport students "one
on one"; a second MCSOS employee must accompany the student and the employee providing the transportation.

Employees must possess a valid Class III California Driver's License and must maintain minimum insurance levels at all times while using a personal automobile in the line of duty.

Use of Gasoline Credit Card

A gasoline credit card will be assigned for use in conjunction with a county car or rental car. The credit card and all receipts must be returned to Operations upon completion of the trip. Gasoline credit cards will not be provided to employees using their own vehicles.

Transportation by Common Carrier

When it is determined by the Superintendent or designated administrator that the most cost effective means of travel is by common carrier, such as airline or train, reservations and ticketing will be handled by the Business Office or other authorized employee.

Lodging

When approved travel includes an overnight stay, reservations will be made by the Business Office or other authorized employee. Preference is given to hotels that offer a government rate and accept a waiver of occupancy/transient tax allowed for government employees.

Travel/Reimbursement Schedule

Reimbursement shall be made to an employee for authorized expenses when a "Reimbursement Claim for Travel Expenses" form is approved by the employee's supervisor and designated administrator. The Business office will process travel claims for payment within 10 working days of receipt. The reimbursement schedule is as follows:

Meals

The employee shall be reimbursed for the cost of meals, on a per diem basis, within the standard State rates. Receipts are not required to be submitted but should be retained by the employee to substantiate expenditures, in the event of an audit by the IRS. No reimbursement will be made for tips, guests or alcoholic beverages. When meals are included in the conference fee, hotel stay, or airfare, the total per diem allowance is reduced for each meal so included. When a trip begins at 7:00 am or later and ends at 6:00 pm or earlier, only reimbursement for lunch will be allowed. The Internal Revenue Service provides that meals are deductible business expenses, when paid or incurred during overnight travel away from an employee's ordinary place of business for a business purpose. Payments for meals for same-day travel (not including an overnight stay) are deemed to be a taxable fringe benefit. Employees are not required to claim reimbursement for meals for same-day travel; however, effective July 1, 2015, if employees claim this reimbursement, the amount of the reimbursement will be included in their taxable income on their W2 statement at year end.

Lodging

When the Business Office or authorized employee makes hotel reservations, payment is issued to the hotel for the actual cost of the stay. When the employee makes hotel reservations, actual expenses up to the maximum of $50.00 shall be reimbursed. Detailed registration receipts are to be submitted. All personal expenses must be deducted from the amount to be reimbursed. If the room was shared with a non-school related person, only the single occupancy rate will be reimbursed.

Mileage

When employees have been authorized to use their personal vehicles, they shall be reimbursed at the standard IRS rate. Mileage begins from the time employees report to their first designated work site. Mileage from home to work or work to home is not

reimbursable. Employees who are scheduled to first report to a worksite other than the regular worksite may claim reimbursement for mileage driven in excess of the mileage from their home to their regular worksite; however, they may not claim the entire mileage from home to the first worksite. Employees who end their work day at a worksite other than the regular worksite may claim reimbursement for mileage driven in excess of the mileage from their regular worksite to their home; however, they may not claim the entire mileage from the last work site to home. A “home base” is established for itinerant employees to determine their regular worksite; the “home base” location may vary during the workweek, depending on assigned schedule. The mileage section of the reimbursement claim form must be completed and include dates of travel, destination, purpose of trips and total miles traveled. When mileage is being claimed by an employee and other employees were passengers, the name of each passenger must be stated on the claim to avoid duplicate claims.

Conference Fees

The actual cost of pre-approved conference registration fees will be paid directly by the Business Office. When costs of meals are included in the conference fees, the total per diem meal allowance is reduced for each meal included based on the meal reimbursement rate.

Miscellaneous

Employees will be reimbursed for the actual cost of authorized miscellaneous expenses such as shuttles, parking fees, and taxi service. Receipts are to be obtained and submitted with reimbursement claim form.

Request for Advance Payment

In order to receive an advance payment for expenses to be incurred for travel, the employee must submit a copy of the approved "Request for Travel" form attached to a "Request for Advance Travel Expenses" form. After returning, the employee must complete a reimbursement claim.

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