

EXPENSE REIMBURSEMENT PROCEDURES

It is the policy of the Board of Trustees to pay actual and necessary expenses incurred by employees, parents, students, and community members of the District in the course of performing authorized services for the District, both within and outside the District, including travel.

A. Mileage Reimbursement

1. Mileage reimbursement is adjusted annually on January 1 to reflect the most recent rate established by the Internal Revenue Service (IRS).
2. Employees whose normal duties and/or job description require frequent travel within and beyond the boundaries of the high school district are eligible for reimbursement (unless covered under a contractual agreement between the Fullerton Joint Union High School District and an employee organization).
3. A reimbursement claim is to be submitted to the immediate supervisor (i.e., principal, director, District administrator) and must carry that individual's approval before submission to the Business Office for payment.
4. Employees must use District vehicles as a first choice, if available, at all locations of the District.
5. Any mileage reimbursement to employees not covered by this regulation will be subject to negotiations with the appropriate employee organization.

B. Conference Reimbursement**Lodging - Receipt Required**

Reimbursement receipts for lodging must be supported by an itemized receipt indicating the charge for each day. If a room is shared by the spouse of the staff member, parent, student, or community member who is traveling for the District, the single room rate shall be claimed, provided evidence of the single room rate is attached to the claim.

If the room is shared with another member of the staff or other person being reimbursed, both names should be shown on the bill and one-half of the amount should be claimed on each attendee's expense report. A copy of the bill should accompany each report.

Transportation - Receipt Required

1. Local Conferences - (Within 50 Miles)

Transportation should be by District vehicle whenever possible. If a District vehicle is not available, authorization for travel by private automobile must be obtained from the principal or immediate supervisor. Reimbursement for use of a private automobile will

Fullerton Joint Union High School District
AR 3132(b)

be at the authorized mileage rate set in Board Policy 3132 if transportation expenses have been authorized. Automobiles should be shared whenever possible. Mileage will not be paid for an individual who could have traveled with other staff members attending the same conference.

(a) If the staff member chooses to drive, the mileage allowance will be at the authorized mileage or tourist class (coach) round-trip plane fare, whichever is less.

2. Conferences Outside the Local Area - (50 Miles or More)

Automobile: If a District vehicle is not available and travel is authorized by private automobile, reimbursement will be at the rate set in Board Policy 3132 or at an amount equal to air coach fare, whichever is less.

In those instances when staff members travel together in a private automobile, mileage reimbursement will be limited to the vehicle owner. Staff members who are passengers in a private automobile are not eligible for mileage reimbursement.

Train or Air: Tickets for air travel will be authorized for air coach only. Tickets may be procured by a purchase order through a local travel bureau or online utilizing the District credit card. The charges for one checked suitcase may be included for reimbursement. An approved purchase requisition showing destination, conference dates, the date approved by the Superintendent, or designee, and total cost are to be submitted to the Business Office. A purchase order will be issued to the travel agency for the tickets.

Other Expenses

Parking, taxi fares, airport buses, business phone calls, one checked suitcase, etc., are allowable expenses. These are to be itemized under "Other Expenses" on the expense reimbursement report with receipts to be submitted whenever furnished.

Conference Registration Fee

A receipt or other evidence must be provided to support registration fees for conferences and workshops. (If registration is paid in advance by the District, it should not be shown on the expense reimbursement report.) Individual organization and association membership dues will not be paid by the District and cannot be included in registration fees.

Meals

Cost of meals is to be shown separately on the expense reimbursement report and identified as breakfast, lunch or dinner, including tax. Allowance for meals will be the Internal Revenue Service per diem maximum for the Orange/Los Angeles metropolitan area, excepting special conference meal/meeting structures.

Reports

Reimbursement claims must be accompanied by a report of the conference on a form provided. Reimbursement will not be made without this report being submitted with the reimbursement claim.

C. BUSINESS-RELATED EXPENSES

School districts may expend reasonable sums of money to purchase refreshments for persons attending district-sponsored events if these events serve a legitimate public purpose. (Education Code 35160) If the expenditure of public funds serves a public purpose such as encouraging attendance at school activities, or if the primary purpose of the expenditure of public funds is to benefit the public, it is not a gift of public funds even though some incidental benefits to individuals may be derived. Such expenditures should be prudent and reasonable so that the benefit to individuals is only incidental.

The Superintendent, Cabinet members, and Principals may incur business-related expenses such as meals or meeting refreshments in the course of performing their duties for the District.

Meals

Cost of meals for business meetings must be documented via itemized receipt and must be accompanied by the list of names of people attending and the purpose of the meeting.

Meeting Refreshments

Cost of refreshments for meetings must be documented via itemized receipt and must be accompanied by the agenda for the meeting and/or the sign-in sheet for the meeting.

Reference: Education Code Sections 44032, 44033, 44576

Regulation approved: November 24, 1970; May 27, 1975; January 5, 1982; June 19, 1990; July 1, 1991; October 5, 1992; October 9, 1995; November 7, 2005; October 5, 2015