**Travel Regulations**

**Purpose:** Section 5 of the State Budget Manual, “Travel Policies and Regulations,” as published by the Office of State Budget and Management, http://www.osbm.state.nc.us/, sets forth travel policies and regulations establishing authorization for, and reimbursement of, expenditures for official travel. The following policies and regulations are adapted from Section 5 of the State Budget Manual as adopted to meet the requirements of local education agencies for travel policies and regulations for authorization from state and federal funds administered by the State Board of Education. All local board policies also apply, and specifically policy DRIVERS 6315/6315-R. **ALL TRAVEL IS CONTINGENT UPON THE AVAILABILITY OF FUNDS IN THE APPROVED BUDGET**. **ALL TRAVEL REIMBURSEMENT REQUESTS MUST BE SUBMITTED IN A TIMELY MANNER OR RISK NOT BEING REIMBURSED (PARTICULARLY IF SUBMITTED IN THE NEXT BUDGET YEAR).**

**Prior Approval:** All travel requires prior approval. Any proposed international travel should be cleared by the Superintendent and/or Finance Officer PRIOR to booking.

Budget managers are required to review prior approval requests to assure that the travel is warranted, and in the case of federal programs, allowable, and that the estimated costs are reasonable and meet the requirements of the district travel policy. Expenditure reports completed upon return for reimbursement should receive the same scrutiny.

**Registration:** Conference registration fees (no maximum) may be paid if supported by a valid receipt or invoice and approved by the supervisor and/or funds manager. Regulations stipulate that registration fees are not to exceed the actual amount expended as shown by a valid receipt or invoice. This rule applies to in-state or out-of-state conferences.

**Lodging:** Written approval by an official designated by the local superintendent must be obtained in advance in order to qualify for reimbursement for an overnight stay. Excess lodging and other expenses should be reviewed and approved by the superintendent or designee via the PRIOR approval form (authorizations must be obtained in advance).

Unless otherwise prohibited, approval for excess lodging expenditures may be considered when a traveler is in a high cost area and unable to secure lodging with the current allowance, or the employee submits in writing that his/her personal safety or security is unattainable within the current allowance.

Included in the definition of excess lodging would be stays in non-traditional, non-commercial accommodations (i.e., Airbnb, VRBO, etc.). **STAYS IN THESE TYPES OF FACILITIES IS STRONGLY DISCOURAGED BUT MAY BE PERMITTED BY STAFF ONLY (if a considerable cost savings is generated by doing so). NO STUDENT STAYS SHOULD BE BOOKED IN NON-COMMERCIAL FACILITIES OR PRIVATE RESIDENCES WITHOUT APPROVAL BY THE FINANCE OFFICER (WHO WILL SECURE INSURANCE AUTHORIZATION). This is due not only to safety, security and liability concerns, but often these accommodations come with hidden or undisclosed fees and charges.**

Specific dates of lodging must be listed on the reimbursement request, and substantiated by a receipt from a commercial lodging establishment, not to exceed the limits specified on the form (unless approval for excess lodging is secured in advance).

Requests for reimbursement must be filed within ten (10) days after the travel period ends. The current form is available on the district website. Receipts are required for reimbursement (except for meals).

The statutory subsistence rate is exclusive of taxes, but inclusive of personal gratuities, except baggage and handling tips. Such “other expenses” if reasonable and appropriate maybe claimed for reimbursement with the appropriate receipts.

**Meals:** Each meal reimbursement must be listed on the reimbursement request. Tips for meals are included in the food allowance. **Times of departure and arrival must be listed on the reimbursement request**. **Also, in order to properly approve travel requests, employees should attach a copy of the detailed agenda so that supervisors and the finance office staff can verify the meals claimed for reimbursement. Under no circumstances should a meal be claimed for reimbursement if provided through the registration fee, from a vendor or free from the hotel.**

**PLEASE MAKE SURE YOU ARE USING THE CURRENT FORM** since the daily maximum allowable statutory rate for the reimbursement of travel and subsistence costs for official business can be found on the current prior approval and expense report forms on the district website. Rates will be reviewed annually by the Board.

Payment of sales tax, local tax, or service fees applied to the cost of lodging is to be paid in addition to the daily subsistence amount. The employee may exceed the ceiling allocated for lodging without approval for over expenditure provided that the total lodging and food reimbursement does not exceed the maximum allowed per day or if excess lodging has been approved.

Breakfast Depart duty station prior to 6:00 am.

Lunch Depart duty station prior to Noon (day of departure).

Return to duty station after 2:00 pm (day of return).

Dinner Depart duty station prior to 5:00 pm (day of departure or return to duty

station after 8:00pm day of return and extend the workday by 3 hours.

Employees may receive *allowances for meals for partial days of travel* when the partial day is the day of departure or the day of return. To be eligible, the employee must:

Allowances shall not be paid to employees for lunches if travel does not involve an overnight stay. To be eligible for allowances for the breakfast and dinner meals, employee must:

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| Breakfast  Dinner | Depart duty station prior to 6:00 am and extend the normal workday by two hours.  Return to duty station after 8:00 pm and extend the normal workday by three hours.  To be eligible for **both** breakfast and dinner meal allowances, (1) the employee must have worked five hours longer than the normal workday and (2) the travel must involve a travel destination located at least 35 miles from the employees regularly assigned duty station. |

**The most misunderstood requirement concerns lunch reimbursement. Reimbursement to employees for lunches eaten while on official state business may be made only in the following circumstances:**

1. **When the employee is in overnight travel status.**
2. When the cost of the lunch is included as part of a registration fee for a formal conference, assembly, etc. Such conferences must involve the active participation of persons other than the employees of a single school unit and must be necessary for conducting official state business. The registration fee must not be exclusively for the lunch.
3. When an employee’s job requires attendance at a meeting of a local board, committee, commission, or council, in their official capacity, and the lunch is pre-planned as part of the meeting for the entire board, committee, commission or council.
4. When the lunch is included as an integral part of a conference, assembly, etc. Such conference must involve the active participation of persons other than the employees of a single school unit; the employee’s attendance must be required for the performance of his/her duties, but must not be part of that employee’s normal day-to-day business activities; and the conference must be planned in advance with a formal agenda and include a written notice or invitation to participants.

No excess will be allowed for meals unless such costs are included in registration fees and/or there are pre-determined charges.

**Transportation:**

**Actual mileage is reimbursable. Mileage is measured from the closer of duty station or**

**point of departure to destination and return.** The mileage rate will be reviewed

annually by the Board.

**No reimbursement shall be made for the use of a personal car in commuting from an**

**employee’s home to duty station** (exception is made for independent homebound or

extended school year services as described in the box on the last page).

Reimbursement for travel between the employee’s duty station and the nearest airline

terminal and for appropriate parking may be made for travel by:

1. Taxi or Airport Shuttle – actual costs with receipts.
2. Private car – approved mileage rate per mile for a maximum of two round trips with no parking charges or for one round-trip with parking charges. Receipts are required for airport parking claims.
3. Use of Public Transportation – In lieu of taxi or airport shuttle, employees can be reimbursed without receipts $5 for each one-way trip either from the airport to hotel/meeting or from the hotel/meeting to the airport.

Reimbursement for travel to and from the airline terminal at the employee’s destination

may be made where travel is via most economical mode available as listed below:

1. Taxi or Airport Shuttle service – Actual costs with receipts.
2. Rental vehicles – May be used with the prior approval of the superintendent or his/her designee (restrictions apply!); however, rental vehicles may not be used for the sole convenience of the employee (receipt required).
3. Use of Public Transportation - In lieu of using a taxi or airport shuttle, employees can be reimbursed without receipts $5 for each one-way trip either from the airport to hotel/meeting or from the hotel/meeting or from the hotel/meeting to the airport.

When a local school unit owned vehicle is used for official travel, the vehicle operator may be reimbursed for parking, storage fees and tolls provided necessary receipts are obtained. Required emergency repairs are not reimbursable from state and federal funds.

**Employees will be responsible for unauthorized costs and any additional expenses**

**incurred for personal preference or convenience (additional fees for insurance, luggage, preferred seating, etc. may or may not be approved, please have them approved in advance by your budget manager).**

**Special rules for homebound travel and compensation**:

Teachers providing homebound or extended school year instruction will be compensated for their actual time spent with students at their respective hourly rates of pay based upon their assignment on the State salary schedule.

Teachers providing this instruction may be reimbursed for use of a personal vehicle to travel to and from the instruction site at the standard mileage reimbursement rate, unless the session is scheduled immediately before or after school. Travel contingent to the school day allows for reimbursement ONLY between the school and the instruction site (no commuting miles).

Prior to compensation or reimbursement by the school district, the principal will review and approve the teacher’s report of actual time spent with homebound student(s) and personal vehicle mileage reimbursement request.