



ADMINISTRATIVE PROCEDURE
SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 7155

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CATEGORY: **Personnel, Leaves/Absences**

EFFECTIVE: **6-05-64**

SUBJECT: **Absence on District Business**

REVISED: **12-16-04**

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing payment and reimbursement for expenses for employee attendance at district-related conferences and district-related travel out of the district, including professional growth, without loss of salary and *with or without* expense reimbursement to the employee.
2. **Related Procedure:**
Lobbying 0705

B. LEGAL AND POLICY BASIS

1. **Reference:** Board Policy I-2300; Education Code Section 44032.
2. The principal/department head must determine that the travel is related directly to present district educational goals and is in support of district goals and objectives as provided by district policies and procedures.
3. District funds will *not* be used for travel or expenditures *for attendance at business meetings and conferences by officers of nondistrict organizations.*
4. *The district may not pay for an individual's membership to an organization; however, if the total conference cost, including the membership cost, is less than the conference cost for nonmembers, the district may pay the individual membership dues upon the governing board's specific action to approve such payment.*

The district may not pay for membership dues when a conference/workshop mandates membership in an organization in order to attend and does not offer a nonmember rate without including the cost of the membership. In these cases, the employee is responsible for payment of the membership as a personal expense.

5. **Honorarium/Compensation Payments.** Whenever an employee receives an honorarium or is paid other compensation for services performed during regular hours, that employee shall endorse payment over to the district.
6. **Parents' and/or student representatives'** travel expenses paid by a district employee on their behalf may be included on the employee's claim for travel reimbursement. *Required receipts must be submitted for these representatives' expenses.*

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Accounting Operations Department, Financial Operations Division, Office of School Site Support.
2. **All exceptions** to this procedure must be approved by the branch head who approved the travel authorization (E.1.).
3. **Legislation/Lobbying Activities.** Travel for matters related to legislation is limited to district legislative services office staff and others *only* as approved by the branch head. Expenses incurred in connection with lobbying activities must be reported in accordance with Procedure 0705.
4. **Trip Cancellations**
 - a. Should a trip be cancelled after a travel authorization has been approved and budget checked by the principal/department head, an expense report must be created and submitted. This is necessary because the travel authorization may have encumbered budgeted funds if prepayments were requested.
 - b. The travel agency must be notified if an airline reservation is involved, as well as the conference vendor or hotel, if applicable. This is the originating department's/site's responsibility.
 - c. Reimbursement for expenses as a result of trip cancellation and non-attendance must be approved by the principal/department head who approved the travel. Incurring expenses prior to a trip, other than prepaid items, such as airfare where the district is billed directly, conference registration fees, or hotel accommodations, would be a very rare circumstance.
5. **Definitions**
 - a. **District business:** Any duties or responsibilities that further the interests of the district and require that an employee be away from his/her normal place of duty.
 - b. **Professional growth:** Activities that enhance an employee's skills, knowledge, and abilities to perform the job, such as conferences, workshops, seminars, or professional meetings.

6. **Approval of Absence.** An employee's supervisor must authorize attendance at the conference or travel. For school personnel other than the principal, the principal is the supervisor; for principals and central office personnel, the next higher level manager is the supervisor. When authorizing an absence, consideration shall be given to requirements and limitations outlined in C.9.
7. **Approval of funding** for *all* absences on district business must be given by the management employee whose budget is to be charged. In addition, attendance or participation at *out-of-district meetings and/or conferences* requires compliance with the following:
 - a. **Management employee** whose budget is to be charged shall approve funding *prior to the employee's attendance or participation*. The employee who is attending the conference/event should complete and submit an online travel authorization form three weeks prior to the event to ensure that approvals and necessary prepayments can be obtained and processed by vendors' stated deadlines.
 - b. Travel authorization must be submitted and approved in advance by employee's principal/department head and respective branch head prior to making any travel arrangements and prior to incurring any expenses.
 - c. Expenses incurred by an employee prior to receiving branch head approval on travel authorization will not be reimbursed. These expenses will be the personal responsibility of the employee.
8. **Criteria for Approval of Absences and/or Reimbursement of Expenses.** Attendance at out-of-district meetings and conferences by district employees can be of benefit to the district; however, travel by employees involves time away from the job and often additional expense to the district. In *all* cases, the value of travel must be weighed carefully in terms of assignment time lost and deferment of work, as well as actual expenses of the travel. Absences for purposes of travel and related expense claims are public records and, as such, are subject to review and audit.
 - a. **Absence *with* salary and reimbursement of expenses** may be authorized when:
 - (1) Employee occupies a management or supervisory position with responsibility relating to the matter involved;

- (2) Employee has a special interest and qualifications relating to a field or subject and is qualified to offer a significant contribution to the district on return to duty;
- (3) Employee is carrying out a specific assignment as approved by the superintendent or his/her designee; *or*
- (4) Conference or business travel is considered to be of such importance or value that the principal/department head directs or recommends that the employee undertake such activity, subject to required approvals.
- (5) **Expenses authorized**
 - (a) A substitute, when required and funds are available.
 - (b) Transportation within the limitations specified in C.9.c.(1)(c).
 - (c) Lodging and meals within limitations specified in C.9.c.(1)(a)–(b).
 - (d) Miscellaneous directly related expenses (e.g., taxi, parking, registration fee, tips, business telephone calls/fax transmissions).
 - (e) One telephone call per day to the employee's home. Prudence shall be exercised when calling home. Phone calls placed directly from hotels can be costly and should be limited to a reasonable time period.
 - (f) Mid-size car rentals at the destination if the cost is less than the cost of a taxi or shuttle service. Written justification is required for all car rentals and must be documented on the online expense claim form.
 - (g) Reimbursement for other expenses on the online expense claim form (E.1.) is limited to books, supplies, and other materials sold at the conference. This is the only situation in which employees may purchase supplies for their sites/departments out-of-pocket.

The online expense claim form (E.1.) may not be used to reimburse an employee for books, office supplies, instructional supplies, and other expenses that are needed in the normal course of district business. These materials must be purchased using the district's

regular procurement methods, i.e., purchase order, walk-through purchase order, and district procurement card. Purchases must be within the limitations prescribed in Procedures 2310 and 2518. Purchases made in violation of these procedures will not be reimbursed and will be the responsibility of the employee.

- b. **Absences related to special project-funded programs and entitlements.** All requirements noted in this procedure apply to requests of employees in special project-funded programs except where project regulations/plan requires attendance at specific activities.
- (1) **Planning/reviews.** The project director or designee may travel for project planning and contract reviews *required* by project regulations, funding-agency directives, and district policies.
 - (2) **Implementation.** The project director or designee may travel for project implementation to meetings called by the funding agency or by the California or U.S. Department of Education for the purpose of providing orientation on specific guidelines on procedures, *if such meetings are required and funded by the project.*
 - (3) **Conference or workshop attendance or participation.** Workshops or leadership training activities must support district goals and must not be available locally. Participation by representatives of special project-funded programs *must be included as an activity in school-level plan or district-level project application.* Requests for attendance or participation will be reviewed and approved case-by-case by appropriate managers. (See C.9. for limitations.)
- c. **Professional meetings.** Participation in such activities should be directly related to the professional growth of the individual employee and must be of benefit to the district as the employer. Because district travel and expense (T & E) funds are extremely limited, principals/department heads are expected to keep such travel to a minimum.

Notes:

*All proposed district-paid expenses for attendance at conferences, workshops, seminars, and professional meetings must be submitted online using the travel authorization form. A hard copy of the approved travel authorization must be submitted with appropriate back-up materials (e.g., conference brochure,

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registration form, meeting announcement or agenda, written hotel confirmation) to the Accounts Payable Unit, Room 3209, Eugene Brucker Education Center, if prepaid expenses, such as conference registration, hotel, and airfare are required prior to attendance or participation. Arrangements must not be made prior to receiving approval on the travel authorization form.

**Since the approved travel authorization form is required *prior* to travel to ensure approval for payment of the travel expenses, the "Request for Absence on District Business" form (E.3) is not required by the Accounts Payable Unit.

- d. **Travel for workshop or leadership training activities requiring released time or expenditure reimbursement.** District staff and parents/guardians or community representatives may attend workshops or leadership training activities that support district goals and are not available locally.

Note: Parents/guardians or community members must pay all of their expenses themselves; no prepayments may be made for them (e.g., airfare, registration, and hotel) for workshop/training activities. The travel expense online system is to be used exclusively for district employees. Parents/guardians or community members can then be reimbursed utilizing a consultant form (Procedure 1550) accompanied by appropriate original, itemized receipts.

- e. **Absence *with salary but without expenses*** may be authorized when:
- (1) Absence is connected with a meeting or convention that the employee is attending at his /her own expense in order to improve personally as an employee or for improvement of his/her position, sufficient to justify loss of time on the job or deferment of other work, but with limited benefits to the district.
 - (2) Attendance is requested at a meeting or conference of a national, state, or regional organization that has a purpose compatible with the educational goals of the district and with the professional development of the individual.
 - (3) Attendance is requested at a meeting or convention of a recognized public service association, and the employee has been designated by the district as an official delegate, with responsibility for significant contribution to the public service by virtue of such attendance or as an officer of the organization.

- f. **Absences as an officer of nondistrict organizations, committee member, and/or a service club member.** Participation must be in the interest of the district and approval by the chief of staff is required prior to commitment. A “Request for Out-of-District Participation” form (E.2.) must be submitted through channels to the chief of staff. Because no expenses will be involved, no travel authorization will be prepared or submitted.
- (1) **Travel for nondistrict organizations.** District funds will not be used for travel or expenditures unless attendance at such meetings is requested by the district.
- (2) **Travel for attendance at service club meetings.** Reimbursement for expenses will not be approved by the district.
9. **Limitations**
- a. **General.** All out-of-district travel authorization requests are to be approved by the principal/ department head in which the request originates. This includes travel by principals/department heads. All travel authorizations are then routed to the respective branch head for final approval. Attendance at out-of-district meetings and conferences should occur as much as possible outside of prime assignment time.
- b. **Mileage rate for use of a personal car.** The rate of reimbursement for use of a personal car for district business is the current applicable Internal Revenue Service rate per mile for actual miles traveled (less daily commuting miles, if applicable).
- c. **Travel out of San Diego County**
- (1) **Reimbursement** is limited to a maximum of 72 hours for in-state and 96 hours for out-of-state travel, including travel expense; three (in-state) or four (out-of-state) nights’ lodging; three (in-state) or four (out-of-state) breakfasts, lunches, and dinners; registration fees; and other directly related expenses.

All in-state trips in excess of three days must be approved by your branch head as an exception. This is accomplished with the travel authorization form, which is submitted online and approved in advance of the event.

All out-of-state trips in excess of four days must be approved by your branch head as an exception. This is accomplished with the travel authorization form, which is submitted online and approved in advance of the event.

After the expense report is completed and submitted online, the requestor must submit the conference brochure, agenda or meeting announcement, and receipts for all expenses, where required, with a hard copy of the expense reimbursement claim form to the Accounts Payable Unit, Room 3209, Eugene Brucker Education Center.

- (a) **Meals.** Reimbursement normally shall not exceed \$45 per day. *Receipts must be submitted with the claim form* if expenses exceed limitations. Exceptions must be approved by the branch head who approved the travel.
- (b) **Lodging.** Reimbursement is limited to three (3) nights for in-state and four (4) nights for out-of-state travel. For conferences, the room rate must not exceed the rates quoted in the conference brochure; for all other business travel, the cost of lodging must be reasonable and subject to the review and approval of branch head approving the travel.
- (c) **Transportation.** Reimbursement shall be for actual airfare or other public transportation costs or personal car mileage reimbursement. Mileage reimbursement from the employee's home to the airport may be reimbursed in lieu of the parking fee if the mileage is less than the parking fee.
 - 1) **Air travel.** Air travel *must* be by commercial airline only; the most economical rates must be used. Lodging and meals over the weekend may be reimbursed if the total cost is less than the airfare cost had the employee not stayed over the weekend. Documentation from the travel agency is required to show the savings to the district. Airline tickets may be purchased directly from the airline company or a travel agency. However, if purchased directly from the airline, payment must be made by the traveling employee and employee will be reimbursed after the trip. Airlines will not agree to issue tickets immediately and wait for payment.

- 2) **Personal/rental vehicle** expenses may be authorized for traveling employees who wish to drive their own or a rental vehicle for personal reasons, *provided* that absence from the job is not greater than that required by public transportation.

Employees will be reimbursed at the rate established for in-district use of personal cars (see C.9.b.), not to exceed the amount of tourist-class plane fare between points involved plus the airport transportation fare to and from the conference site. The district does not rent vehicles for employees traveling on district business. Renting a vehicle is the responsibility of the employee. Employees must make all necessary arrangements to rent a vehicle and pay for that rental themselves. The rental cost may be submitted for reimbursement after the trip as long as an original, itemized receipt is obtained.

Note: The limitation “not to exceed the amount of tourist-class plane fare between points involved” does not apply when two or more employees are transported in the same vehicle. Reimbursement of other expenses incurred in the use of a personal car (e.g., lodging and meals en route, parking or garage charges en route) are not authorized if the expenses exceed those that would have been required had the employee used public transportation.

- 3) **Insurance Coverage.** The district has general liability insurance covering the use of a personal or rental vehicle when that vehicle is being used for district business by an employee acting within the scope of his/her employment. However, the employee's or rental agency's automobile insurance company, as prime carrier, pays first; district coverage takes effect only after the employee's or rental agency's carrier has paid. District insurance may cover medical expenses for occupants of the employee's automobile; however, district insurance does not cover physical damage to personal or rental vehicles. Because of the potential for personal liability, employees using personal or rental vehicles should ensure that they carry adequate automobile liability coverage.

When traveling on officially approved district business, all employees are covered by workers' compensation. Salaried employees with a position equivalent of 75 percent or greater are also covered under an accidental death and dismemberment policy when district travel is outside the corporate limits of the town or city in which the employee is regularly employed or has his/her residence.

- (2) **Attendance at conferences outside San Diego County** will be determined by availability of funding, the location of the conference, and availability of substitutes. A parent/guardian may be selected as a second representative for those meetings directed to staff and community. Parent/guardian or student representatives' expenses may be reimbursed through a consultant contract form. Expenses paid for by district employees traveling with parent/guardian or student representatives may be included in the employees' claim for reimbursement as long as original, itemized receipts are obtained and submitted after the trip for all expenses for the parent/guardian along with a written explanation. Representatives should have a clearly defined subsequent responsibility to provide inservice to ensure the site receives a benefit from the parent's/guardian's attendance at a conference.

d. **Travel within San Diego County**

- (1) **Reimbursement** is limited to the registration fee, mileage for nonmanagement employees (see C.9.b.), parking fee, and meals that are included as part of the conference. For example, a luncheon with a speaker is considered part of a conference and is reimbursable. Lunch at a restaurant while attending a conference in San Diego County is not reimbursable.
- (2) **Attendance** at local conferences is limited to the number deemed appropriate by the principal or supervising management employee. For conferences planned for both staff and community participation, parents/guardians may be selected as representatives.

D. IMPLEMENTATION

1. **Participation in Nondistrict Organizations.** Requester submits "Request for Out-of-District Participation" form (E.2.) to supervisor. No travel authorization should be created or submitted online.

2. **Travel Related to Special Project-Funded Programs and Entitlements.** Refer to project guidelines.
3. **Absences *With* Salary but *Without* Substitute or Expense Reimbursement**
 - a. **Requester** completes “Request for Absence on District Business” form (E.3.) for approval *at least three workdays in advance*, processing in accordance with instructions on the front of the form.

Do not send copies of the form to any department unless specifically requested to do so. Do not send a copy of the form to the Accounts Payable Unit. The original form is to be retained at your site/department by your site/department timekeeper.
 - b. **Supervisor** considers criteria and limitations outlined in this procedure; if requested absence is approved, then employee may proceed with creating and submitting a travel authorization form online.
 - c. **Timekeeper** enters absence on time sheet, if applicable.
4. **Conference or Convention in San Diego County (*Without* Expenses)**
 - a. **Requester** submits “Request for Absence on District Business” form (E.3.) per D.3.
 - b. **Blanket approvals**
 - (1) **Division head/instructional leader** issues written blanket authorization by information circular.
 - (2) **Employee** notifies supervisor of intent to attend local conference/convention.
 - (3) **Timekeeper** enters absence on time sheet, if applicable.
 - c. **Conferences and workshops using list of staff.** Management employee sponsoring or coordinating activity prepares list of staff attending, attaches list to a “Request for Absence on District Business” form (E.3.), and routes form in accordance with instructions on the front of form. No travel authorization should be prepared or submitted online.

Note: Intent is to eliminate need to file individual request for absence on district business forms and yet comply with law and district policy.

5. **Travel at Expense of Other Agencies.** When travel expenses are paid for entirely or partially by other agencies, employee should prepare and submit an expense report online. Employee should indicate and fill in information regarding donor(s) and value of travel expense paid. Employee should indicate a payment type of “personal expense” in the online expense claim form to show the item is not to be paid to a vendor nor reimbursed to the employee. It is for documentation purposes only. (This will assist in completing California Form 730 [Fair Political Practices] when required.)

6. **Absences *With* Expenses (Including Conferences/Conventions in San Diego).** Travel authorization requests must be submitted online a minimum of two weeks in advance of anticipated date of departure. If prepayments are requested, such as airfare, hotel accommodations and registration fees, then three weeks is recommended. Travel authorizations are routed electronically from the requester to the principal/department head and then to the respective branch head for approvals. After branch head approval is obtained, requester may proceed with making travel arrangements. Funding must be approved *prior to employee’s attendance or participation*.
 - a. **Requester**, prior to travel:
 - (1) Completes and submits a travel authorization form online (E.1.).
 - (2) If airfare is needed and payment directly to travel agent is requested in advance:
 - (a) Following confirmation of approval by branch head, requester makes necessary arrangements through a travel agency, being careful to provide the agency with the travel authorization number from the online form. Travel agency must agree to invoice district directly with an original, itemized invoice to the Accounts Payable Unit, 4100 Normal Street, Room 3209, San Diego, CA 92103. Invoice must reference employee’s travel authorization form number and employee’s name.

- (b) Employee prints a hard copy of his/her travel authorization form and attaches a copy of the itinerary from the travel agency. Accounts Payable Unit will follow up and ensure an original invoice is received and will pay the vendor directly when verification of branch head approval can be made.
 - (c) Submits airfare expense receipt, airline confirmation letter, or e-ticket confirmation to the Accounts Payable Unit with a hard copy of the online expense claim form (E.1.) after the trip.
- (3) **Advance payment of registration fees and hotel accommodations.** Following confirmation of approval by branch head, requester makes necessary reservations and requests written confirmation for hotel reservation. This confirmation may be faxed to the requester.

Employee prints a hard copy of his/her travel authorization form, attaches the conference registration form and hotel confirmation and forwards them to the Accounts Payable Unit. The hotel portfolio must be submitted to the Accounts Payable Unit with a hard copy of the online expense claim form (E.1.) after the trip.

- (4) **Advance of funds.** In rare cases of financial hardship, the superintendent or designee may authorize the advance of funds to district employees, or direct payment to an association or outside parties, to cover necessary expenses such as meals and parking. Employee must contact the accounts payable supervisor in advance, then will be instructed on how to proceed. Employee must obtain signature approval from the superintendent or designee and provide written justification for request. After the trip, employee must submit online expense claim listing all expenses incurred. Advanced funds must be deducted from total claim. Original, itemized receipts must be submitted with claim within 30 days after the trip.
- b. **Accounts Payable Unit**, prior to requester's travel:
- (1) Receives hard copy of approved online travel authorization form from requester, along with documentation for advance payment requests, such as itinerary/invoice from travel agency, completed conference registration form or itemized hotel confirmation.
 - (2) Processes for payment all expenses approved to be paid in advance and remits payment directly to vendor.

- c. **Human Resources Division** provides substitute if requested.
- d. **Requester**, immediately upon return from travel:
 - (1) Reports to supervisor on conference or convention.
 - (2) Completes and submits expense claim form online, prints a hard copy of the expense claim and attaches all necessary original, itemized receipts and shows them to principal/department head.
- e. **Principal/department head** reviews receipts and approves expense claim. Requester sends hard copy of claim and receipts to the Accounts Payable Unit for payment processing.
- f. **Accounts Payable Unit**, upon receipt of expense claim form and receipts:
 - (1) Reviews claim online for proper approvals, proper documentation and compliance with requirements of this procedure; processes payment to employee and mails warrant to employee's home address as it appears on the official Human Resources Division record of the employee.

E. FORMS AND AUXILIARY REFERENCES

- 1. Employee expense online module in PeopleSoft. (For information on training, please see URL <http://prod031.sandi.net/pdu/training/>)
- 2. Request for Out-of-District Participation, Form SDCS-813, available from division office
- 3. Request for Absence on District Business form, Inventory Item 22-R-2343

F. REPORTS AND RECORDS

G. APPROVED BY

Kerry B. Flanagan

Chief of Staff, Kerry Flanagan
For the Superintendent of Public Education