



Travel Policies and Procedures

Adopted July 1, 2023

Revised February 12, 2024

Contents

- Introduction 4
- Planning 4
- Authorization 4
- Loyalty Program Rewards 4
- Non-reimbursable Travel Expenses 4
- Advances 5
- Overnight Travel 5
 - Lodging 5
 - Nonconventional Lodging 5
 - Lodging in excess of GSA rate 5
 - Additional Lodging Fees 5
 - Parking 6
- Transportation 6
 - Multiple Employees Traveling to Same Location 6
- Rental Vehicles 6
- Airfare 6
- Out-of-State Travel 7
- Local travel – conference/workshops 7
- In-district travel 7
 - Eligible Employees 7
 - Monthly mileage 8
- Submission deadline 8
- Federally Funded Travel 8
- Board Member Travel 8
- Student Travel 8
 - Student Meal Allowance 9
 - Athletics 9
 - Non-Athletics 9
- Booster Club Enhancement 9
- Motor Coaches 9
 - State Competition 9
- Field Trips/Chaperone 9

Conference Housing.....	10
Submitting Travel Documents for Reimbursement	10
Unable to obtain detailed receipt.....	10
Alcohol is not allowed	10
Reimbursements mailed to campuses.....	10
Travel using grant funds.....	10
Unallowed Grant Travel Costs	10

Introduction

The purpose of this manual is to provide relevant information to district staff with regards to the policies and procedures related to employee travel.

Each district employee authorized to travel for school business assumes a direct financial responsibility to limit travel claims to those actually incurred while traveling and representing Waxahachie ISD. Likewise, each employee has a responsibility to limit travel to purposes that are clearly essential.

Planning

Arrangement utilizing the most economical means of accomplishing the authorized travel *must* be considered. This planning should include consideration of the use of their personal car or common carrier, sharing rides with other employees attending the same event, and similar alternatives when appropriate.

Authorization

A signature of approval shall be secured by employees for professional out-of-town, overnight meetings and conferences on the Request to Travel Form prior to the trip occurring. Once completed, the form is to be submitted to your campus/department secretary to be attached to the required travel purchase orders.

No personal charges incurred due to last minute changes to travel accommodations and/or plans will be reimbursed unless the changes are deemed reasonable and/or necessary (i.e. personal or family emergency)

Loyalty Program Rewards

In accordance with the State Comptroller's TexTravel Guidelines, the district acknowledges that discount or reward programs, such as frequent flyer miles or hotel reward points are not things of value belonging to the district. The administrative burden to track the individual reward programs of employees would be administratively impractical and thus the district has determined that the employees may retain the value, if any, that they receive personally due to school business related travel.

Non-reimbursable Travel Expenses

The following travel expenses are not reimbursable:

- Travel to participate in meetings of civic or social associations (Rotary Club; Lions Club, etc.),
- Tours or other entertainment while on business travel,
- Hotel room movie rentals, room service, alcoholic beverages, expenses charges to the hotel room and expenses incurred by a spouse/traveling companion,
- Upgrades on rooms, seats, flights, or early bird check-ins,
- Travel incurred during an employee's vacation period unless it occurs during a school related conference or workshop,
- Per diem while on local travel

Advances

Waxahachie ISD does **not** advance travel funds.

Overnight Travel

The district does not expend funds for overnight lodging unless the distance from the district to the event is at least 50 miles. When requesting a purchase order that includes overnight accommodations, employees should provide a travel map that shows the most direct route to the event being at least 50 miles from the district. Employees who require exceptions to this policy need to contact the Chief Financial Officer for approval before submitting a purchase requisition. Approval of exceptions will only be granted in writing.

Lodging

The district adheres to the published GSA travel rates and policies prescribed by the Comptroller's Office. All hotel rates should be quoted based on actual occupancy in accordance with the published rates. All allowable rates are "per night" and averaging of nightly rates is not acceptable for compliance with the GSA rate requirements.

Hotel rates vary and every effort should be made to obtain the most economical and practical (i.e. sharing rooms when appropriate) accommodations available considering the purpose of the meeting/conference. Upon arrival, the traveling employee should verify the rate quoted when the rooms were booked is the rate being charged per night.

Each employee is required to obtain a Hotel Occupancy Tax Exempt form from the Campus/Department secretary to be used while travelling. It is also recommended that the employee take a Sales Tax-Exempt form due to the fact that some hotels will charge sales tax for parking. Please note that hotels are *not required* to accept a tax-exempt form for parking.

Nonconventional Lodging

Employees may be reimbursed the cost of other types of lodging when there are no conventional lodging facilities in the area or when conventional facilities are in short supply because of an influx of attendees at a special event. Such lodging facilities includes Airbnb, VRBO, college dormitories or similar facilities or rooms not offered commercially but made available to the public by area residents in their homes.

Lodging in excess of GSA rate

Employees are allowed to personally cover additional costs above allowable district costs. This should be done at the time of hotel check-in or immediately upon return of the employee.

Additional Lodging Fees

Hotels that charge fees in addition to the nightly room rate, often times styled as "resort fee", "amenity fee", "urban destination fee", "facility fee", "daily destination fee", or a similar title, are eligible for reimbursement if approval is granted before the travel occurs to incur the fee. These fees should be evaluated to see what the fee is covering. Fees charged by properties for items that are not otherwise allowable will be added to the room rate to determine compliance with the GSA rate.

Parking

In addition to the standard GSA lodging rates, the district will cover self-parking fees per night. In the event a hotel does not offer self-parking, and a reasonable surface parking lot is not available, the district will cover the cost of valet parking.

Transportation

Out of pocket expenses associated with public transportation such as taxicabs, uber, shuttles, transit fare, and parking will be reimbursed after travel. Receipts for these expenses must be submitted with the signed travel reimbursement form to be reimbursed. In lieu of receipts, alternate documentation may be submitted to substantiate transportation expenses.

Travelers with a district issued credit card can use the card to pay for these expenses but must submit receipts upon return from their travels.

Travel by personally owned private vehicle outside of the district shall be reimbursed at the IRS approved rate. Mileage will be calculated utilizing an internet mapping program based on the most direct route to the destination.

The district will reimburse mileage utilizing the most economical (direct) route. Employees are welcome to utilize whatever route they feel most comfortable with, but reimbursement of mileage will be limited to the most economical route.

Multiple Employees Traveling to Same Location

When two or more employees of the District, with the same conference/meeting itinerary, are traveling, mileage reimbursement shall be claimed and allowed for only one of the employees. In other words, everyone can drive, but only one person will be reimbursed.

Rental Vehicles

When sufficient district vehicles are not available, the district may rent vehicles for personnel travel. This travel should be done sparingly. The district will cover the cost of the vehicle rental with a purchase order approved ahead of time. Failure to secure an approved purchase order will not obligate the district to cover the costs of the vehicle rental.

Airfare

Where it is most economical, the district will reimburse employees for flights for school-related activities. A copy of a roundtrip travel map from an internet mapping program should be attached to all requests for airfare reimbursement to document how the flight was a more economical means of travel.

Flight reimbursements will be limited to no more than 1 checked piece of luggage per traveler and economy class fare. Any additional luggage fees and/or fare change fees will not be reimbursed by the District.

Airfare should be arranged as early as possible to take advantage of the lowest pricing available.

When determining most economic rate of airfare, the district will use the lowest Southwest Airlines published fare to the destination, even if the time is inconvenient to the traveler. If Southwest does not

have a published fare to the destination, then the District will use an average of the lowest three mainline air carriers published rates to set the reimbursement limit.

Employees should not make reservations through third-party websites unless the fare is fully refundable. Employees who pay for travel and do not ultimately travel will not be reimbursed for travel costs incurred.

Out-of-State Travel

Employees wishing to travel out of state will need the approval of their appropriate cabinet-level supervisor or Superintendent.

Meal and lodging allowances for out of state travel are in accordance with the published GSA rates for the travel destination(s). A copy of all event schedules/itineraries should be included with the travel request to facilitate determination of the appropriate GSA limits.

All other standard district travel procedures apply to out of state travel.

All student out-of-state travel requires board approval if the travel is to occur during the school year and/or advertisement of the travel opportunity is to occur on any campus or through the district.

Local travel – conference/workshops

Local conference and/or workshop registrations are to be made using a purchase order, following the same procedures as overnight conferences. All backup/invoices must be attached to the travel form prior to submitting to the purchasing department.

If mileage reimbursement is requested for a local conference or workshop, the travel form must be completed. Meal allowances are not eligible for local travel.

In-district travel

In-district travel is defined as staff traveling for the District at the principal's or director's request and by using a personally-owned private vehicle. Staff should attempt to limit in-district travel as much as possible, utilizing other means to complete tasks.

Waxahachie ISD district employees may be reimbursed for authorized and approved travel between school campuses and/or offices. A completed travel form is required for reimbursement.

Mileage will be paid at the IRS approved rate for actual miles driven to the 1/10th of a mile, no rounding. A map showing a consistent route, or each segment of travel should accompany the completed travel form for mileage reimbursement.

Mileage between home and work are considered commuting miles by the IRS and are not reimbursable.

Eligible Employees

Employees who are listed on the administrative/professional pay scale, pay grades 6-10 are not eligible for in-district mileage reimbursement.

All eligible employees must have approval from their campus principal/department director and an approved purchase order to be reimbursed for in-district mileage. Failure to secure approval before travel occurs will cause reimbursement request to be denied.

Monthly mileage

Employees with routine in-district mileage may compile all mileage for the month and submit for monthly reimbursement. A completed travel form and a mileage chart showing date and location of travel for the month are required to be submitted for reimbursement, along with an approved purchase order.

Submission deadline

All travel documents are due by the 10th of the month for reimbursement. If the 10th is a weekend/holiday/non-scheduled working day, all documents are due the last working day before the weekend/holiday/non-scheduled working day.

Single event travel is due within 10 days of the employees return from the travel. Monthly mileage is due within 10 days of the end of the month.

Documentation can be submitted by the campus/department secretary via email or campus mail.

Federally Funded Travel

All travel expenses paid with federal grant funds shall meet the new Federal Education Department General Administrative Regulations (EDGAR) requirements (200.474) such as: 1) all travel costs must be reasonable and necessary; 2) all travel costs must be consistent with the district's travel policy; 3) all travel costs must be directly related to the grant award, and; 4) all travel costs must meet the obligation of expense rule.

All federal travel costs must be approved by the Director of State and Federal Program before the travel occurs.

Board Member Travel

Expenses involving School Board members, while traveling on school business, will be reimbursed at actual costs and subject to the same restrictions and limitations as employee travel. Receipts are required for meals to be reimbursed.

Student Travel

All Waxahachie ISD student travel is to follow district policies. No student may travel to represent Waxahachie ISD unless accompanied by a Waxahachie ISD employee. For accountability purposes, every student must have a student partner assigned to them (buddy system), where appropriate. Students should not be transported in a personally owned vehicle under any circumstances.

All district travel guidelines for student travel, registration fees, hotel stays, and meals using District funds apply. Unanticipated travel costs are the responsibility of the traveling employee and will be considered for reimbursement upon return from the trip.

Student Meal Allowance

District employees traveling with students should submit a comprehensive roster of all students traveling with their request for student meal funding. Students will be required to sign for all funds received.

Athletics

Regular season

Student athletes at the high school level are allotted \$6 per meal for each away competition during the preseason and regular season.

Post Season

Student athletes at the high school level are allotted \$10 per meal for each away competition during the post season

State-level

Student athletes at the high school level are allotted \$10 per meal and one meal of \$20 per student during state competition.

Non-Athletics

All other student meals allowances when traveling outside of the district is \$6 per meal outside of UIL sponsored activities, and \$10 per meal when competing in UIL activities with one \$20 meal when at a state-level competition that the students have qualified for through achievement at other directly related competitions. If there is no sub-state competition, the limit is \$10 per meal per student.

Booster Club Enhancement

As allowable under UIL rules, Booster clubs are allowed to provide funds to increase the student meal allowance as long as the same funds are made available to all traveling students and not based on classification, standing, skills, or performance.

Motor Coaches

The District will utilize district provided transportation for all out of town travel as long as equipment and personnel are available. When equipment or personnel are not available, the District may use motor coaches for extracurricular activities when it is deemed most economical.

State Competition

When students are competing in the state semi-finals or state final round of a UIL sanctioned activity, the District will provide motor coach transportation. The sponsoring campus or department, working with the business office, will make the arrangements.

Field Trips/Chaperone

Employees who are required to attend a field trip or serve as a chaperone are eligible for out-of-town meal allowances in accordance with the published GSA rates for the destination.

Non-employees who serve as chaperones or accompany field trips, are not eligible for trip, travel, or meal reimbursements. Non-employees, except board members on school business, are allowed to ride in district vehicles unless approved cabinet-level supervisor or the Superintendent.

Conference Housing

The district is limited to the published GSA rates for the location during the conference. Employees and Board Members wishing to stay at the conference hotel will be responsible for all costs, if any, beyond the published GSA rates.

Submitting Travel Documents for Reimbursement

Upon return to the district, traveling staff should organize and submit their travel documents and receipts to the campus/department secretary for processing. Receipts that are not submitted, or do not meet the submission requirements, will not be reimbursed.

All receipts should be taped securely to 8.5" x 11" copy paper when submitted for payment. Please do not staple receipts to the paper as these will get torn up during processing. Tape should not obscure any part of the establishment name, location, time, items, quantity, or pricing printed on the receipt.

Unable to obtain detailed receipt

Where an authorized traveler is not able to obtain a detailed receipt, they should submit the receipt that they do have along with a detailed explanation of what goods were purchased along with price per unit, total cost, and date and time of transaction – as best as is known.

Alcohol is not allowed

Receipts with alcohol present will not be reimbursed, even if the authorized traveler did not consume the alcohol or the alcohol was credited off of the receipt.

Reimbursements mailed to campuses

Travel reimbursements will be sent to the appropriate campus through inter-campus mail. If a traveler would like the check sent to a different location, they need to request that at the time of submission of their travel receipts.

Travel using grant funds

Travel using grant funds may have differing requirements and limitations to remain in compliance with the applicable grant standards. All travelers utilizing grant funds for their travel should check with the Director of Federal and State Programs to ensure they know any applicable limitations before they incur the costs.

Unallowed Grant Travel Costs

Unallowed grant travel costs will not be reimbursed by the general fund without written authorization from the Superintendent.