

PLAINFIELD BOARD OF EDUCATION

Standard Operating Procedures

TRAVEL 2022

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Superintendent

Mr. Mark A. Williams
Assistant Superintendent

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School Business Administrator

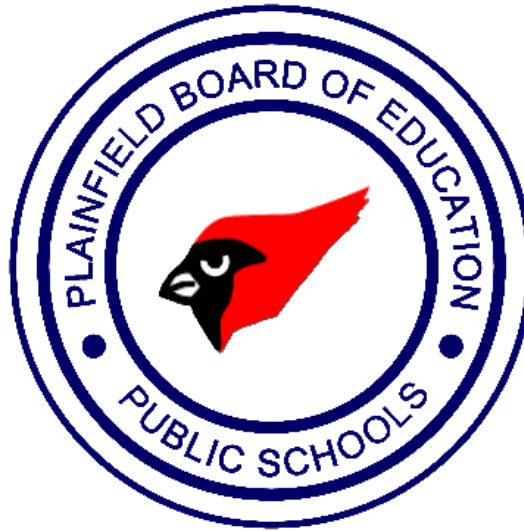
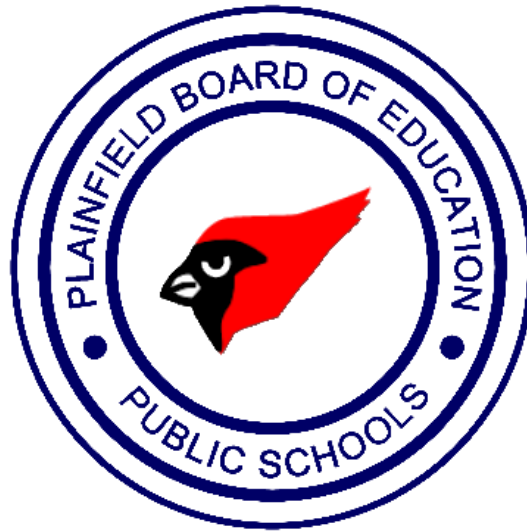


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DISTRICT TRAVEL

The State of New Jersey, pursuant to N.J.S.A. 18A:11-12, has adopted strict travel guidelines for school districts to follow. All school officials and employees seeking permission to attend travel event or receive travel reimbursement must adhere to the law and travel administrative code—N.J.A.C. 6A:23A-7.1 et seq. The district has prepared the following travel standard operating procedures in full compliance with law, code and Board Policy Number 9250.

The district provides standard operating procedures for School Business Travel and Conference Travel events.

School Business Travel

Administrative Rules

The Administrative Rules for School Business Travel have been reviewed and approved by the Superintendent or Designee of Schools. These rules pertain to employees who are authorized to receive reimbursement for using their personal vehicles to travel to various events while conducting board business or to attend regularly scheduled events.

A. RECOGNIZED TYPES OF SCHOOL BUSINESS TRAVEL

1. Visitations

This business travel requires the employee to use his/her personal vehicle for the following out-of-district visits to conduct school business:

- Department of Education offices, e.g., Trenton, Newark;
- Other school districts, e.g., Child Study Team, Official Capacity Visits;
- Local, County, State, and Federal Offices; and
- Court visits out of the district, e.g., Jersey City

Employees seeking to be reimbursed for using their personal vehicles for this travel must complete the request form and obtain the Superintendent or Designee's permission **prior** to the travel.

2. Attendance at Regularly Scheduled Events

- Attendance at regularly scheduled county meetings.
- Professional association regularly sponsored events – In-State – No Costs.
- Department of Education sponsored events – In-State – No Costs; and
- Professional development activities – Regular School District Business travel also includes regularly scheduled in-state professional development activities with a registration fee that does not exceed \$150.00 per employee or board member.

Employees seeking to be reimbursed for using their personal vehicles for this travel must complete the request form and obtain the Superintendent or Designee's permission **prior** to the travel. *Ref. N.J.A.C. 6A:23A-7.3(b) (3)*

3. Explanation of School Business Travel -- \$150.00 Registration Fee

- Department of Education Events—DOE
The Department of Education (DOE) sponsors a number of regularly scheduled professional development activities that involve registration costs. A registration fee for DOE event that does not exceed \$150.00 per individual is considered School Business Travel.

School Business Travel

Administrative Rules

B. ANNUAL MAXIMUM TRAVEL AMOUNT – PER EMPLOYEE-- \$1,500.00 LIMIT (WITHIN THE STATE OF NJ)

Pursuant to N.J.A.C. 6A:23A-7.3(b) (1), the Board of Education, by resolution, authorizes an annual maximum amount per employee for regular business travel not to exceed \$1,500.00. Any additional travel amount beyond the maximum amount requires Board of Education approval.

Employees are notified that they are to carefully monitor their costs for School Business Travel costs to ensure it does not exceed the \$1,500.00 per employee maximum.

C. SCHOOL BUSINESS TRAVEL PROCEDURES

1. Approval Process

School Business Travel Form

All employees requesting to be absent from school duties are to complete the form.

Request for School Business Travel

and submit the form to the Office of the Superintendent or Designee at least ten (10) days prior to the travel.

Approval from the Superintendent or Designee is required prior to travel. *Ref. N.J.A.C. 6A:23A-7.3(b) (3)*

2. Attachments to Request Form

Justification Statement

Employee shall provide a brief statement that includes the primary purpose of the travel and the key issues that will be addressed at the event. (Not required for visitations.) *Ref. N.J.A.C. 6A:23A -7.5(b)(4)*

D. TRAVEL ACTIVITIES –SCHOOL BUSINESS TRAVEL

1. Activity Registration – Purchase Order

Registration for professional development activities shall be made by preparing a purchase order for the vendor. Purchase orders should be prepared well in advance for the vendor to receive the registration.

Pre-Payment of Registration

Some professional associations require the registration to be pre-paid. If this is the case then a Request for Vendor Check form shall be completed and attached to the purchase order and submitted to the Superintendent or Designee before the purchase order deadline.

School Business Travel

Administrative Rules

2. Activity Registration – Purchase Order Cont'd

Please note: IMPORTANT! – Purchase Order Attachments

No purchase orders will be signed or processed unless the following is attached:

- Approval of Superintendent or Designee ([Request for School Business Travel Form](#));
- Copy of the Registration Form

3. Automobile Vehicles

Use of a school district-owned or leased vehicle shall be the first means of ground transportation. Use of a personally owned vehicle on a mileage basis shall not be permitted for official business where a school district-owned or leased vehicle is available.

- [Mileage](#)
- [Mileage Rate](#) – Annual NJ State Appropriations Act

Mileage allowance in lieu of actual expenses of transportation shall be allowed at the rate authorized by the annual New Jersey State Appropriations Act, or a lesser rate at the board's discretion for an employee or board member traveling by his personally owned vehicle on official business. *Ref. N.J.A.C. 6A:23A-7.9(c)(4i)*

Currently, the mileage reimbursement is \$0.35 per mile.

In accordance with the OMB circular, if any condition in an existing negotiated contract is in conflict with the circular, such as the mileage reimbursement rate, the provision of the contract will prevail.

Parking and toll charges shall be allowed in addition to the mileage allowance.

- [Travel Mileage Commute Deduction Worksheet](#)

All persons using their personal vehicle on board approved travel shall complete the district's Travel – Mileage Commuter Deduction Worksheet wherein pursuant to NJ Circular 20-04 OMB Section VIII H-4 normal commutation expense must be deducted when calculating mileage allowance.

All employees using privately owned vehicles in the performance of their duties for the school district shall present a New Jersey Insurance Identification Card indicating that insurance coverage is in full force and

School Business Travel

Administrative Rules

- Insurance Identification Card – Required Submission – With Request Form effect with companies approved by the State Department of Banking and Insurance. The card shall be made available to the Superintendent or Designee before authorization to use privately-owned cars. *Ref. N.J.A.C. 6A:23A-7.9(c) (4) (v)*

Employees who are out-of-state residents must provide appropriate insurance identification in lieu of the New Jersey Insurance Identification Card.

- Vehicle Registration – Required Submission – With Reimbursement Purchase Order

All individuals using personal vehicles on a travel event must submit a copy of the vehicle registration with the purchase order for travel reimbursement. *Ref. N.J.A.C. 6A:23A-7.13(e) (9)*

All travel by automobile must be done by the most direct, economical, and usually traveled route. Travel miles will be the actual mileage traveled. The Business Office will use www.mapquest.com as a verifying guide, if necessary.

- Carpooling
The Board encourages the use of carpooling for economic and environmental reasons. The Board will only reimburse the employee/owner of the vehicle being used. New Jersey Insurance Certificate and Vehicle Registration copies are required.
- Tolls
Reimbursement will be provided for the cost of all tolls. Every effort should be made to obtain receipts. EZ Pass documentation is acceptable.
- Parking Costs
Reimbursement will be provided for the cost of all reasonable parking costs. A receipt for parking payment is required for reimbursement.

Please Note: One-day Trips – Meals -- Not Reimbursable
One-day trips are not eligible for any meal and incidental travel expense reimbursement.

School Business Travel

Administrative Rules

E. REIMBURSEMENT PROCEDURES – SCHOOL BUSINESS TRAVEL

1. Travel Reimbursement Expense Voucher

The travel reimbursement voucher shall be completed by the employee to document the details of the travel event. The voucher must be signed by the employee to certify the validity of the charges for which reimbursement is sought. The form must also bear the signatures of approval officials for processing.

A Travel Reimbursement Voucher form for multiple travel events is available.

Items Required for Travel Reimbursement

- Quote from “Orbitz” reflecting airfares. The date of the quote from Orbitz must be the same date as your airline ticket purchase, or reimbursement cannot be made. If taking the train (Amtrak), Acela service is not permitted.
- Taxi/Ubers are reimbursable only for reasonable instances, i.e. to/from conferences/dinner, please note that sightseeing, shopping, zoo, etc. are **not** reimbursable.”
- Hotel reservations are **not** to be made thru Hotels.com or other websites. They are to be made directly with the hotel.
- **Original** airline/train boarding passes/tickets.
- **Original** receipts for all meal purchases showing details of items ordered. Credit card charge slips are not acceptable.
- Please obtain separate receipts for Employee/Board Members as a singular charge, i.e., dining.
- **Original** receipt from hotel reflecting all charges and payments.
- **Additional Airline Fees** (i.e., early boarding, additional leg-room, overweight baggage, Travel Insurance, etc.) will not be reimbursed by the Plainfield Board of Education.
- Please review the **Per Diem Rates** for your travel. Meals will be reimbursed according to the guidelines.
- Summary report must be submitted indicating the purpose and importance of the trip.
- The Board must approve all reimbursements for travel on the Bills List at a public board meeting.
- All required documentation must be submitted and approved by the 5th of the month to be added to the Bills List for Board approval.
- No travel reimbursement will be made to employees without being on the Bills List.

I have read and understand the above-noted travel requirements. I further understand that reimbursements will not be made for items that do not comply with the above.

Signature

Date

School Business Travel

Documentation Required – Expenditures

- a. Transportation – Personal Vehicle
 - Actual mileage traveled; dates traveled – attach one of the following:
 - *MapQuest
 - *Google Maps
 - Travel Mileage Commute Deduction Worksheet
 - Insurance Identification Card
 - Vehicle Registration
- b. Tolls -- Toll receipts or EZ Pass documentation whenever possible.
- c. Parking -- Receipt required.

1. Documentation Required – Other

- a. Purchase Order
- b. Travel Request Form – copy
- c. Copy of Travel Report, Professional Development travel N.J.S.A. 18A:11-12 (d)

2. Miscellaneous Provisions

Attachments to Purchase Order

All required documents shall be attached to the purchase order requesting reimbursement.

Receipts

Actual and original receipts are required. Credit card statements shall not be accepted as documentation of expenses.

Reimbursement Payment

The School Business Administrator shall not approve or issue payment until all required documentation and information have been submitted and verified.

Deadline to Submit Reimbursement – June 30th Deadline

All outstanding travel vouchers for the school year ending June 30th shall be submitted as soon as possible after June 30th regardless of the amount, notwithstanding. *N.J.A.C. 6A:23A-7.13(f)*

School Business Travel

F. TRAVEL VIOLATIONS—MONITORING/COMPLIANCE

All travel will be monitored to ensure compliance as follows:

Office of the Superintendent or Designee

The Office of the Superintendent or Designee shall review all requests for travel to ensure compliance with the law, code, policy and administrative rules. Any employee who violates the law, code, policy or rules shall be subject to the penalties assigned in N.J.S.A. 18A:11-12 (s).

Office of the School Business Administrator

The Office of the School Business Administrator shall review all requests for travel reimbursement to ensure compliance with the law, code, policy and administrative rules in accordance with N.J.A.C. 6A:23A-7.6 (c).

Board of Education

If on occasion, there is a Board of Education member who violates the school district's travel policy, law, or code, it shall be reported to the full Board of Education, who shall by board resolution, initiate sanctions outlined in N.J.A.C. 6A:23A-7.7(c) against said Board Members.

G. SANCTIONS FOR VIOLATIONS OF TRAVEL REQUIREMENTS

Maximum Travel Violations

Any board that violates its established maximum travel expenditure as set forth in N.J.A.C. 6A:23A-7.3 above, or that otherwise is not compliance with the travel limitations set forth in this section may be subject to sanctions by the Commissioner as authorized pursuant to N.J.S.A. 18A:4-23 and N.J.S.A. 18A:4-24, including reduction of State aid in an amount equal to any excess expenditure pursuant to N.J.S.A. 18A:11-12 and N.J.S.A. 18A:7F-60.

Travel Approval Violations; Approval Authority – Superintendent or Designee of Schools

A person who approves any travel request or reimbursement in violation of the district's policy or these rules shall be required to reimburse the school district in an amount equal to three (3) times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12 (s). In accordance with N.J.A.C. 6A:23A-7.7(b)(1) the approval authority for travel to the District is the Superintendent or Designee. In case of the absence of the Superintendent or Designee, the alternate approval authority to approve travel requests is the Superintendent or Designee of Schools. *Ref. N.J.A.C. 6A:23A-7.4(a)(1)*

They shall be subject to all penalties as outlined in this section.

School Business Travel

Travel Reimbursement Approval Authority – School Business Administrator

The School Business Administrator (SBA) is designated as the travel reimbursement approval authority. The SBA shall review and approve all requests for travel expenditure reimbursements pursuant to N.J.A.C. 6A:23A-7.6(c) and shall be subject to all penalties as outlined in N.J.A.C. 6A:23A-7.7(b).

Travel Violations - Employees

An employee or board member who violates the school district's travel policy or these rules shall be required to reimburse the school district in an amount equal to three (3) times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12. *Ref. N.J.S.A. 18A:11-12(s), N.J.A.C. 6A:23A-7.7(c)*

Violations of Administrative Code – Loss of State Aid

Any Board of Education that violates its established maximum travel expenditure or that otherwise is not in compliance with the travel limitations set forth in this section may be subject to sanctions by the Commissioner including reduction of State aid in an amount equal to any excess expenditure. *Ref. N.J.S.A. 18A:11-12(r)*

School Business Travel

Travel Expense Voucher

The attached Travel Reimbursement Voucher is to be completed and attached to the purchase order for a reimbursement of travel expenses.

The Superintendent or Designee's signature is required prior to submitting to the Business Office.

The School Business Administrator will sign upon verification of receipts and documents.

TRAVEL REIMBURSEMENT VOUCHER

***This form must be submitted within 10 days following board/employee's return from the workshop/conference.
Please print and attach the original receipts.***

Name _____ Position _____
Street _____ Budget Line _____
City/State/Zip Code _____ Received by: _____
Title of Workshop/Conference _____

DATE	HOTEL/TRAVEL COSTS				MEAL COSTS*			TRANSPORTATION (airfare/train)	TOTAL AMOUNT
	HOTEL	MILEAGE	TOLLS	TAXI	BREAKFAST	LUNCH	DINNER		
GRAND TOTAL									

*Mileage from school or home, whichever is the shorter distance.

BOARD/EMPLOYEE'S CERTIFICATION

I certify that the above expenses were incurred on behalf of the Board. I have submitted Travel Report and/or Board Training Report. I also certify that the above expenses are correct in all respects. The dates therein specified, and the amounts charged have been actually paid for traveling expenses. Original itemized receipts are attached.

Board/Employee's Signature _____ Date _____
Supervisor's Signature _____ Date _____
Special Projects Office 5/2002
Revised 3/2006

School Business Travel

Reimbursement Checklist

The attached Travel Reimbursement Checklist is to be used as a guideline for those individuals that are seeking to be reimbursed for any approved travel.

The Reimbursement checklist is to be attached to the purchase order.

Travel Reimbursement Checklist

The following items must be attached to all purchase orders for School Business Travel reimbursement. The School Business Administrator shall not approve or issue payment until all required documentation and information have been submitted and verified.

A.	<p>Purchase Order The purchase order for reimbursement shall be duly signed by the School Business Administrator.</p>
B.	<p>Travel Request Form – Copy The Travel Request Form shall be completed and signed noting prior approval dates. Attached must be a copy of the agenda of the travel event.</p>
C.	<p>Travel Voucher Form – Original The Travel Voucher Form submitted shall document all expenses and be signed with the original signatures of the employee. The School Business Administrator and Supervisor shall sign the document upon review of all expenditures.</p>
D.	<p>Envelope -- Receipts All original receipts with date and time of expense incurred shall be placed in an envelope and attached to the Travel Voucher.</p>
E.	<p>Copy of Travel Report All persons authorized to travel shall prepare and submit a brief report explaining the travel event. A copy of the travel report shall be submitted with the purchase order for reimbursement. (Not required for visitations)</p>
F.	<p>Personal Vehicle Documentation (If applicable) Copy of the Vehicle Registration Copy of the Insurance Identification Card</p>
G.	<p>Travel Mileage Commute Deduction Worksheet</p>
H.	<p>Miles Traveled – Supporting Documentation – attach one of the following:</p> <ul style="list-style-type: none"> • Map Quest • Google Maps

School Business Travel

Return of Purchase Order Reimbursement of Travel Expenses

The attached Return of Purchase Order form is used by the Business Office to inform the person who submitted a purchase order for travel reimbursement that there were some deficiencies in the paperwork.

The employee has to make all adjustments as noted on the form before any reimbursement can be considered.

Return of Purchase Order(s) – Reimbursement of Travel Expenses – SCHOOL

BUSINESS TRAVEL

TO: _____

FROM: _____,

DATE: _____

RE: ***Return of Purchase Order(s) – Reimbursement of Travel Expenses –
Items Not Submitted***

_____ **Transportation** – Personal Vehicle

_____ Actual Miles Traveled/Dates of Travel – Attach one of the following:

*Map Quest

*Google Maps

*Yahoo Maps

_____ Mileage Rate – Incorrect Rate _____ per mile

_____ Mileage Commute Deduction Worksheet

_____ Insurance Identification Card

_____ Vehicle Registration

_____ Parking Receipts

_____ **Travel Voucher Form**

_____ Signatures Missing

_____ Form Not Attached

_____ **Travel Report** – Not Attached

_____ **Other**

Please submit all items with the form attached to the Business Office.

School Business Travel

Mileage Form Deduction Worksheet

TRAVEL

Conferences

Administrative Rules

Travel Conferences

Administrative Rules

The Administrative Rules for travel have been approved and comply with:

- N.J.S.A. 18A:11-12 et seq.
- N.J.A.C. 6A:23A-5.9, 6.13, and 7.1 et seq.
- Commissioner's Regulatory Letter – March 17, 2008
- NJ Department of Treasury Circular 20-04 OMB, 11-09 OMB
- Federal OMB Circular A-87
- Board Policy 9250 <https://go.boarddocs.com/nj/plainfield/Board.nsf/vpublic?open#>
- Travel Guidelines—January 1, 2009—NJ DOE

These rules pertain to employee travel, board member travel and the types of travel listed below.

- Types of Travel
 1. Training/Seminars/Workshops
 2. Conventions and Conferences
 3. Retreats
 4. School District Sponsored Events

Other Types of Travel

- Regular School District Business Travel
- Travel Allowance
- Regular School District Business Travel -- Separate Administrative Rules

The Board of Education, in conjunction with the Superintendent or Designee of Schools, recognizes certain regular school district business travel that occurs within the normal operation of the district. A separate set of administrative rules for regular school district business travel will govern the travel.

- Travel Allowance – Separate Administrative Rules

Travel allowance is a defined payment amount made through the payroll process to an authorized employee for using his/her vehicle while traveling on school district business. A separate set of administrative rules for travel allowance has been prepared.

Travel Conferences

Procedures Attendance at Conference

A. REQUEST TO ATTEND CONFERENCE – COMPLETE REQUEST FORM

All employees requesting to attend a conference must complete and submit the Request for Attendance at Conference Form to the Office of the Superintendent or Designee.

The Superintendent or Designee will review the request to determine whether the travel is: Reference N.J.S.A. 18A:11-12 (c) (1) (2)

- Educationally necessary
- Fiscally prudent
- Directly related to and within the scope of the employee's current responsibilities and/or the school district's professional development plan; and/or
- Critical to the instructional or operational needs of the district.

All request forms are to be submitted at least eight to ten (8-10) weeks prior to the travel date. This will allow time for administrative review, Board of Education approval and Executive County Superintendent approval, if necessary.

Attachments to Request Form

All requests for attendance at the conference must have the following items attached to the request form:

1. Justification Statement

Employee shall provide a brief statement that includes the primary purpose of the travel and the key issues that will be addressed at the event. Ref. N.J.A.C. 6A:23A-7.5(b) (4)

2. Board Resolution

The approving administrator shall prepare the appropriate travel resolution (see sample) and attach the resolution to the request form. Resolutions should also be sent electronically to the Superintendent or Designee's Office.

3. Insurance Identification Card – Required Submission

All employees and board members using privately-owned cars in the performance of their duties for the school district shall present a New Jersey Insurance Identification Card indicating that insurance coverage is in full force and effect with companies approved by the State Department of Banking and Insurance. The insurance ID card is to be submitted to the Superintendent or Designee's Office with the travel request form. Ref. N.J.A.C. 6A:23A-7.9(c) (4v)

For each travel request, the employee shall submit the insurance identification card when using a personal vehicle.

Checklist for Superintendent or Designee Review

A Checklist for Superintendent or Designee Review has been prepared for the employee to use as a guide when submitting travel requests to the Superintendent or Designee. **(See Appendix B)**

B. APPROVALS NEEDED – PRIOR TO TRAVEL

1. Superintendent; Board Approval – Prior to Travel Event—N.J.S.A. 18A-11-12 (f)

All travel must be approved prior to the travel date. Employees requesting to attend a conference must receive the following approvals:

- Superintendent or Designee – Prior to the travel date; and
- Board of Education – Prior to the travel date.

The Board of Education is prohibited from approving a travel resolution after the travel has been completed. Ref. N.J.S.A. 18A:11-12(4)(i)

2. Executive County Superintendent Approval – Out of State Travel Only Pursuant to N.J.A.C. 6A:23A-5.9(c), written approval is needed from the Executive County Superintendent if:

- Out of state travel event has a total cost that exceeds \$5,000 – regardless the number of attendees; or where
- Six (6) or more individuals from the district are to attend the same out-of-state travel event.

Executive County Superintendent – Approval Process

- Obtain approval of Superintendent – Conference Form
- Obtain approval of Board of Education
- Complete Travel Request Form – Executive County Superintendent
Obtain Superintendent’s signature
- Submit the form with any documentation to assist the decision-making process (one month prior to travel event)

3. Out of Country Travel -- Approval

For all employee and board member travel events out of the country, regardless of cost or number of attendees, the school district shall obtain the prior written approval of the Executive County Superintendent. Such requests must be supported by detailed justification. It is expected that approvals will be rare. Ref. N.J.A.C. 6A:23A-5.9(d)

4. Unforeseen Travel Situations – Approval

There may be an occasion where unforeseen situations arise wherein a travel request cannot receive prior approval of the Board of Education. A memo shall be prepared and sent to the Superintendent of Schools outlining the compelling reason(s) and justification for the employee to attend the travel event.

Travel Conferences

The Superintendent of Schools, in granting approval, shall also request permission from the Executive County Superintendent or his/her designee. No travel in these types of unforeseen situations shall take place unless approval is received from the

- Superintendent of Schools; and the
- Executive County Superintendent of Schools or his/her designee.
- Travel to conferences, conventions and symposiums are not considered to be emergencies and shall not be approved after the fact. Ref. N.J.A.C. 6A:23A-7.4(e)

The Board of Education shall ratify the travel request at its next regularly scheduled meeting.

5. **Alternate Approval Authority**

The Superintendent of Schools may designate an Alternate Approval of Travel Authority and shall have the authority to approve travel requests in the absence of the Superintendent. Ref. N.J.A.C. 6A:23A-7.4(a)(1)

C. **TRAVEL ACTIVITIES**

The travel activities listed are to be prepared, reserved, and/or scheduled only after official approvals have been granted. Any costs for unauthorized unapproved travel will be paid by the employee. An employee who travels in violation of the school district's policy and/or N.J.S.A. 18A:11-12(s) shall be required to reimburse the school district in the amount of three (3) times the cost associated with the event.

1. **Conference Registration– Purchase Order**

Registration for conferences shall be made by preparing a purchase order for the vendor. Purchase orders should be prepared well in advance for the vendor to receive the registration.

Some conferences require the registration to be pre-paid. If this is the case then a Request for Vendor Check form shall be completed and attached to the purchase order and submitted to the Business Office before the purchase order deadline.

Please note: IMPORTANT! – Purchase Order Attachments

No purchase orders will be signed or processed unless the following is attached:

- Approved Request for Attendance at Conference Form;
- Approved Board Resolution;
- Executive County Superintendent Approval – if applicable; and
- Copy of the Registration Form.

2. **Travel Routing**

All travel shall be by the most direct, economical and usually-traveled route. Travel by other routes as a result of official necessity shall only be eligible for payment or reimbursement if satisfactorily established in advance of such travel.

Travel Conferences

In any case, where a person travels by indirect route for personal convenience, the extra expense shall be borne by the individual.

Reimbursement for expenses shall be based only on charges that do not exceed what would have been incurred by using the most direct, economical and usually-traveled route.

3. Travel Methods

For the purposes of these rules, “transportation” means necessary official travel on railroads, airlines, shuttles, buses, taxicabs, school district-owned or leased vehicles and personal vehicles.

The purchase or payment of related transportation expenses shall be made by purchase order or personally by a school district employee, or board of education member and reimbursed at the conclusion of the travel event. An actual invoice or receipt for each purchase or expense shall be submitted with a claim for reimbursement. Ref. N.J.A.C. 6A:23A-7.10(a)

Quotations Needed – Air Fare Only

Air and rail tickets shall be purchased via the internet if possible, using online travel services such as Travelocity, Expedia or Hotwire. Reimbursement for air fare without documentation from at least three (3) airlines and/or services is prohibited. Ref. N.J.A.C. 6A:23A-7.8(a)(17)

a. Air Travel

Air travel shall only be authorized when determined that it is necessary and advantageous to conduct school district business.

- The most economical air travel should be used, including the use of discounted and special rates.
- The following options should be considered when booking tickets:
 - Connecting versus nonstop flights;
 - Departing earlier or later compared to the preferred departure time;
 - Utilizing alternative airports within a city, i.e., Chicago, Illinois – Midway Airport versus O’Hare Airport;
 - Utilizing alternative cities, i.e., Newark versus Philadelphia.
 - Utilizing “low cost” airlines; and
 - Exploring alternate arrival and/or departure days.
- No employee or board member can earn benefits as a result of school district-funded travel. Employees and board members are prohibited from receiving “Frequent Flyer” benefits accruing from school district-funded travel.
- Airfare other than economy (i.e., Business or First Class) shall not be fully reimbursed by the school district except when traveling in such classes:
 - Is less expensive than economy;
 - Avoids circuitous routings or excessive flight duration; or
 - Would result in overall transportation cost savings.

Travel Conferences

- All airfare other than the economy and not covered by the above exceptions purchased by an employee or board member shall only be reimbursed at the economy rate for the approved destination.
- Cost estimates on travel requests and associated authorizations shall be consistent with current airline tariffs, with consideration of available special fares or discounts, for the requested destination.

Airline tickets shall not be booked until all necessary approvals have been obtained.

- Justification shall be required when actions by a traveler result in additional expenses over and above the authorized travel request. Sufficient justification shall be considered only for factors outside the control of the purchaser. Additional expenses without sufficient justification shall not be reimbursed.
- Justification shall accompany requests for airline ticket reimbursement when purchased by employees or board members contrary to the above regulations. Sufficient justification shall be considered only for factors outside the control of the purchaser. Noncompliant purchases without sufficient justification shall not be reimbursed. Reimbursement of purchases with sufficient justification shall be otherwise permitted and reimbursed in accordance with the above procedures.

Baggage Fees – Airline

The district recognizes that airline baggage that was once checked in without cost now has a minimum fee of \$35.00 per bag assessed by the airlines.

The New Jersey Administrative Code is silent about reimbursement of airline baggage fees, however, it is noted in two separate citations pertaining to airline travel that additional expenses incurred by the traveler "... outside the control of the purchaser" may be considered for reimbursement.

Baggage Fee Reimbursement – Limit One (1) Bag

The district will consider in accordance with N.J.A.C. 6A:23A-7.9(c)(2)(viii/ix) reimbursing the employee or board members up to \$35.00 for one bag checked in. Receipts must be provided for reimbursement as well as documentation from the airline that the baggage fee is a required fee. (Ref. NJ Circular 20-04 OMB Page 12 Item C-11)

b. Rail Travel

- Rail travel shall only be authorized when determined that it is necessary and advantageous to conduct school district business.
- The most economical scheduling of rail travel shall be utilized, including excursions and government discounts whenever applicable.

Travel Conferences

- When one employee or board member is traveling within the Northeast Corridor, NJ Transit shall be used as the rail option. Use of Amtrak will not be authorized unless it is the only means of travel available.
- The use of high-speed rail services, such as Acela, shall not be authorized.
- All rail travel, including rail travel in the Northeast Corridor must be processed in the same manner as prescribed for Air Travel.

Travel Reservations – Air and Rail Travel

- Quotations Needed (3)

Air and rail tickets shall be purchased via the internet if possible, using online travel services such as Travelocity, Expedia, or Hotwire.

Reimbursement for airfare without documentation from at least three (3) airlines and/or services is prohibited. Ref. N.J.A.C. 6A:23A-7.8(a)(17)

- Reservations – Prepaid by Employee; Board Member

Travel costs may be prepaid by the employee or board member. At the conclusion of the travel, a purchase order for reimbursement may be prepared and submitted

Please note: IMPORTANT! – Purchase Order Attachments

No purchase orders will be signed or processed unless the following is attached:

- Approved Request for Attendance at Conference Form;
- Approved Board Resolution;
- Executive County Superintendent Approval, if applicable; and
- Originals Receipts

c. Automobile Vehicles

- Mileage Rate

Mileage allowance in lieu of actual expenses of transportation shall be allowed at the rate authorized by the annual New Jersey State Appropriations Act, or a lesser rate at the board's discretion for an employee or board member traveling by his personally-owned vehicle on official business. Currently, the reimbursement mileage rate is \$0.35 per mile.

In accordance with the OMB circular, if any condition in an existing negotiated contract is in conflict with the circular, such as the mileage reimbursement rate, the provision of the contract will prevail.

Parking and toll charges shall be allowed in addition to the mileage allowance.

Reimbursement for travel to points outside the state by automobile shall be permitted when such arrangements prove to be more efficient and economical than other means of public transportation.

Travel Conferences

In determining the relative costs of private and public transportation, all associated costs (i.e., tolls, taxicabs, airport or station transfers, etc.) shall be considered.

- Travel Mileage Form

All persons using their personal vehicle on board approved travel shall complete the district:

Travel – Mileage Form

Wherein pursuant to NJ Circular 20-04 OMB, Section VIII H-4 normal commutation expense must be deducted when calculating mileage allowance.

- Insurance Identification Card – Required Submission

All employees and board members using privately-owned cars in the performance of their duties for the school district shall present a New Jersey Insurance Identification Card indicating that insurance coverage is in full force and effect with companies approved by the State Department of Banking and Insurance. The insurance ID card is to be submitted to the Superintendent or Designee's Office with the travel request form. Ref. N.J.A.C. 6A:23A-7.9(c)(4v)

Employees who are out-of-state residents must provide appropriate insurance identification in lieu of the New Jersey Insurance Identification Card.

- Vehicle Registration -- Required Submission

All individuals using personal vehicles on a travel event must submit a copy of the vehicle registration with the purchase order for travel reimbursement. Ref. N.J.A.C. 6A:23A-7.13(b)

All travel by automobile must be done by the most direct, economical and usually traveled route. Travel miles will be the actual mileage traveled. The Business Office will use www.mapquest.com as a verifying guide, if necessary.

- Carpooling

The Board encourages the use of carpooling to conferences for economic and environmental reasons. **The Board will only reimburse the employee/owner of the vehicle being used.**

- Tolls

Reimbursement will be provided for the cost of all tolls. Every effort should be made to obtain receipts. Copies of EZ Pass statements highlighting the tolls paid are acceptable documentation.

Travel Conferences

Limousine Services and Chauffeuring Costs – Prohibited

The Board of Education shall not be responsible, nor bear the costs for limousine services or chauffeuring costs to and from the event or during the event.

- Parking Costs

Reimbursement will be provided for the cost of all reasonable parking costs.

A receipt for parking payment is required for reimbursement.

- Ground Travel at the Event

Taxicabs

Necessary taxicab charges are permitted. However, travel to and from airports, downtown areas, and between hotel and event site shall be confined to regularly scheduled shuttle service, whenever such service is complimentary or is less costly. If shuttle service is not available, taxicabs may be used—the receipt is requested for reimbursement.

Car Rentals – Prohibited; Exceptions

Car rentals, either utilized for airport transportation or transportation at a conference, convention, etc., are prohibited unless absolutely necessary for the conduct of school district business. Justification must accompany any request for car rentals. If approved, the most economical scheduling of car rental is to be used, including the use of subcompacts, discounted and special rates. An example of the justified use of car rental is when an employee is out of state, making inspections at various locations, and the use of public transportation is impractical. When car rental is authorized, the employee shall not be issued an advance payment for the anticipated expense associated with the rental.

4. **Subsistence Allowance**

a. **One Day Trips** -- N.J.S.A. 18A:11-12(n)

One day trips are not eligible for subsistence (lodging, meals, incidentals) payment or reimbursement except for mileage; tolls and reasonable parking costs, exceptions are noted in NJ Circular 20-04 OMB and N.J.A.C. 6A:23A-7.11(a)

b. **Overnight Travel – Within New Jersey** – Prohibited

In accordance with NJ Circular 20-04 OMB Section X-B and N.J.A.C. 6A:23A-7.11(b)

“No overnight travel is permitted within the State”.

Travel Conferences

- Exceptions to Overnight Travel In-State Rule

Pursuant to the OMB Circulars, generally, overnight travel shall not be eligible for subsistence reimbursement if travel is within the State. Overnight travel is permitted if such travel is authorized or is a required component of a grant, donation, or other funding agreement with the district. The specific required overnight in-state travel event must be detailed in the approved grant, donation, or other fund acceptance agreement along with number of employees (s), board member(s) and total cost. All reimbursements are subject to these rules unless the funding acceptance agreement specifies otherwise. *Ref. N.J.A.C. 6A:23A-7.11(b)*

- Exception – Commissioner’s Waiver

The Commissioner shall be authorized to grant waivers for overnight travel for school board members and school district employees to attend in-state conferences. Such waivers will be granted in only extremely limited circumstances, where the sponsoring organization can demonstrate that the conference is broad and multi-disciplinary in scope, incorporates content offerings from numerous specialty areas, and includes important professional development opportunities and/or required training. In addition, the sponsoring organization must demonstrate that the conference’s content, structure, and anticipated attendance necessitate that it be held on multiple consecutive days with overnight lodging.

- Limitation – 50 Mile Commute

If a waiver of the prohibition on overnight travel is granted pursuant to this subsection, it shall permit reimbursement for travel expenses for only those individuals whose home to convention commute exceeds 50 miles.

- No Reimbursement – Prior to Check-in; After Check-out

Overnight travel within the State shall not be eligible for subsistence reimbursement if travel is on the day prior to the start of the conference. Reimbursement shall be prohibited for lodging prior to time for the first day of the event or after check-out time on the last day of the event. *Ref. N.J.A.C. 6A:23A-7.11 (e)*

Travel Conferences

c. Overnight Travel – Out of State

Limitations – 50 Mile Commute

Out-of-State travel events shall be limited to the fewest number of board members or affected employees needed to acquire and present the content offered to all board members or staff, as applicable, at the conclusion of the event. Lodging may only be provided if the event occurs on two or more consecutive days and where home to event commute exceeds 50 miles. *Ref. N.J.A.C. 6A:23A-7.11(d)*

d. Overnight Travel – In State/Out of State

Federal GSA Per Diem Rates – Lodging, Meals and Incidentals

The US General Services Administration publishes a schedule of federal per diem rates in the Federal Register for approved overnight travel by the event location. The latest federal per diem rates schedule for lodging, and meals and incidental expenses by location can be found at www.gsa.gov.

Allowable per diem reimbursement for lodging, meals and incidentals shall be actual reasonable costs, not to exceed the federal per diem rates for the event location. Registration and conference fees are not subject to the federal per diem rate caps. If the event location is not listed, the maximum per diem allowance shall be \$46 for meal/incidental expenses and \$77 for lodging or amounts listed in any superseding NJOMB circular.

e. Lodging

Pursuant to N.J.S.A. 18A:11-12(o) (2), reimbursement for lodging expenses for overnight travel, out-of-state or in-state as authorized by the Commissioner, may exceed the federal per diem rates if the hotel is the site of the convention, conference, seminar or meeting and the going rate of the hotel is in excess of federal per diem rates.

Lodging Reservations (Hotel is Convention Site)

Board and employees are responsible for hotel reservations and payments. On their return reimbursement will be issued. The reservations must be for the regular conference room rate. The district will not reimburse for any room upgrades. Some hotels require prepayment. The following items shall be attached to the purchase order:

1. Approved Request for Attendance at Conference Form;
2. Approved Board Resolution; and
3. Executive County Superintendent Approval Letter (if applicable).

Please note: Hotels usually reserve a block of rooms for conference attendees at a special conference rate. Once that block has been sold out, the hotel will make rooms available at the regular hotel rate. If this is the case, the Board will only reimburse the employee or Board Member for the conference room rate. Any extra costs above the conference room rate shall be borne by the employee/Board Member.

Travel Conferences

Lodging Reservations (Hotel is NOT Convention Site)

Lodging expenses may not exceed the Federal maximum per diem rate for lodging in the designated city. All payments for lodging that is not the hotel site are to be borne by the attendee. The Board will only reimburse the maximum per diem rate.

f. Meals and Incidental Expense (M & IE)

- **One-Day Trips**

One-day trips that do not involve overnight lodging are not eligible for any meal and incidental expense reimbursement (M & IE), except as noted in NJ Circular Letter 20-04 OMB.

- **Overnight Travel – Per Diem Meal & Incidental Expense Rates**

NJ Circular Letter 20-04 OMB notes with references to meal per diem rates will be the actual reasonable costs, however, not to exceed the federal per diem rates, as established in the Federal Register for the current year.

The federal per diem rates may be found on www.gsa.gov.

The meals and incidental expenses reimbursement rate (M & IE) range from \$46.00 to \$71.00 (on travel days, GSA rates are reduced to 75% of the meal and incidental allowance rate) per diem as follows:

- **GSA Meals/Incidental Expense Worksheet**

Included with these rules and regulations is a GSA Meals/Incidental Expense Worksheet. This worksheet is to be used when visiting the Federal government website www.gsa.gov to find out the actual rate for M & IE for the location of the event. *The Expense Voucher Form is to be attached to all purchase orders for reimbursement.*

Please note: If the employee/board member's destination is somewhere other than the locations listed in the Federal Rate then the maximum reimbursement is \$31.00 per diem for meals and incidentals.

- **Meals; Original Receipts Required**

- **Certification of Expenditures – Meals Reimbursement**

All employees and board members seeking reimbursement for meals and incidentals shall sign the Expense Travel Form and certify that all expenditures were actual and reasonable and in compliance with the Travel Administrative rules of the XXXXX Board of Education.

Travel Conferences

- Meals Included in Registration Fee

In accordance with N.J.S.A. 18A:11-12(o)(6) employees shall not request reimbursement for meals if meals are included in the conference registration fee.

If the meal is not part of a one-sum fee for a travel event, reimbursement may be approved for the full cost of an official convention meal that the employee or board member attends, when such meal is scheduled as an integral part of the convention or conference proceedings. Receipts shall be submitted in order to obtain reimbursement in such situations. The amount of the federal per diem rate for the corresponding meal shall be deducted from that day's subsistence allowance.

The allowance for a meal or meals, or incidentals shall not be eligible for reimbursement when included and paid in the registration fee, the cost of lodging or transportation charge.

- Miscellaneous Restrictions

In any cases in which the total per diem reimbursement is greater than the federal per diem rates, the costs shall be considered excessive in the absence of substantial justification accompanying the travel voucher submitted by the employee or board member.

Employees and board members shall patronize hotels and motels that offer special rates to government employees unless alternative lodging offers greater cost benefits or is more advantageous to the conduct of school district business.

Actual subsistence expenses shall not be reimbursable if paid by the traveler to a member of his family, or another school district employee, or a member of the family of another school district employee. *Ref. N.J.A.C. 6A:23A-7.11(f)*

- Meal Allowances; Certain Situations

Meals for in-state travel shall not be eligible for the reimbursement except as expressly authorized within these regulations. Meals during one-day, out-of-state trips required for school business purposes may be authorized for breakfast, lunch and/or dinner in an amount permitted by NJOMB. The Commissioner shall post the most current rates on the Department website for reference.

Lunch for training sessions and retreats may be authorized for an amount up to \$7 per person only when it is necessary that employees or board members remain at a site *other than* their school district and there are no viable options for lunch at the off-site location. If lunch is included in a one-sum registration fee for the training session, the full amount is eligible for reimbursement if reasonable. Refreshments for breaks may also be provided at training sessions and retreats held at a site *other than* the school district. Therefore, providing lunch for staff meetings and in-service days or for staff that comes from other parts of the school district shall not be permitted. (See N.J.A.C. 6A:23A-7.12(d)). Also, per N.J.S.A. 18A:11-12 (a) (1)(d), board retreats shall be held onsite unless there is no school district site available.

Travel Conferences

Subsistence expenses for an employee or board member shall not be allowed at the school district or within a radius of ten miles thereof, except for meals expressly authorized by and in accordance with the provisions of this section. Non-allowed expenses include but are not limited to meals and refreshments for staff meetings and in-service days. *Ref. N.J.A.C. 6A:23A-7.*

5. Travel Expenses; Expenditures

a. Allowable Expenses

All subsistence expenses – lodging; meals; incidentals; travel previously mentioned including:

- Internet Connection Service - The Board will reimburse daily internet connection service fees if the internet service is used for district business. (Receipt required.)
- Gratuities – The Board will reimburse all gratuities for valet parking, baggage service, maid service, etc., not to exceed the published current Incidental Expense amount listed in the GSA Domestic Per Diem Rate schedule.
- Other expenses that are defined as essential to transacting official business and have been pre-approved.

b. Expenses Not Allowed

The Board will not reimburse the following:

- ♦ Alcoholic Beverages – The Board will not reimburse for alcoholic beverages. If it is part of the food bill, the employee must so notify the Board by deleting the amount from the request for reimbursement.
- ♦ Charges for laundry; cleaning; valet services.
- ♦ Entertainment -- Any and all entertainment including hotel in-room movies, amusement, diversion and social activities and any costs directly associated with such costs/tickets to shows or sports events, meals, lodgings, rentals, transportation and gratuities.
- ♦ Food for Spouse; Relatives; Friends; etc. – The Board will not reimburse any food or beverage costs for spouses, relatives, friends, etc. Only costs incurred by the employee and in accordance with the GSA per diem rate will be considered.
- ♦ Gratuities in excess of the Federal Per Diem Rate.
- ♦ Hospitality Rooms.
- ♦ Souvenirs, memorabilia, promotional items or gifts.
- ♦ Other non-conference-related expenses.

Travel Conferences

c. Other Travel Expenditures; Expenses Not Eligible for Reimbursement

- Subsistence reimbursement for one-day trips, except for meals expressly authorized by and in accordance with the provisions of N.J.A.C. 6A:23A-7.12;
- Subsistence reimbursement for overnight travel within the State, except where authorized by the Commissioner in accordance with the procedures set forth in N.J.A.C. 6A:23A-7.11;
- Travel by board members or employees whose duties are unrelated to the purpose of the travel event or who are not required to attend to meet continuing education requirements or to comply with law or regulation;
- Travel by spouses, civil union partners, domestic partners, immediate family members and other relatives;
- Costs for employee attendance for coordinating other attendees' accommodations at the travel event;
- Lunch or refreshments for training sessions and retreats held within the school district including in-service days and for employee participants traveling from other locations within the school district;
- Training to maintain a certification that is not required as a condition of employment (example: CPE credits to maintain a CPA license if the employee is not required to be a CPA for continued school district employment).

d. Conference Related Expenses – Prior Approval Needed

While the Board appreciates that there are many books, materials, supplies, videos and other items available for purchase in preparation for the conference, at the conference itself, and any post-conference events, the Board cannot be expected to reimburse employees/board members for any of these items purchased, unless so previously provided by the Superintendent and/or Board resolution. These items should be ordered upon return from the conference through the purchase order process.

Travel Conferences

e. Travel Reimbursement Procedures – Ref. N.J.A.C. 6A:23A-7.13 et seq.

1. **Memorandum of Expenditures**

All persons authorized to travel must keep a memorandum of expenditures, noting each time the expense incurred, together with the date incurred.

2. **Travel Reimbursement Voucher**

The travel voucher shall be completed by the employee or board member to document the details of the travel event. The travel voucher must be signed by the employer or board member to certify the validity of the charges for which reimbursement is sought. The form must also bear the signatures of approval officials for processing. **(See Appendix H)**

3. **Documentation Required - Expenditures**

a. Lodging - Copy of the hotel bill with all personal charges deducted from the bill. When lodging is shared jointly, the fact must be stated on the travel voucher. Credit card statements are not acceptable forms of documentation for lodging expenses.

b. Meals/Incidentals – Completed and signed GSA Meals/Incidentals Worksheet.

c. Transportation – Personal Vehicle

- Actual mileage traveled – dates of travel
- Insurance Identification Card
- Vehicle Registration
- Supporting Documentation – Miles Traveled
- * Map Quest
- * Google Maps
- Mileage Computation Worksheet

All persons are to deduct home to work (commute) miles from the total mileage traveled.

d. Tolls – Toll receipts or EZ Pass Documentation

e. Transportation -- Other

Actual receipts – no credit card statements (air, rail, bus).

Air Fare – Evidence of three (3) quotations

f. Ground Travel

Shuttle – Actual Receipt

Taxi – Receipt and Explanation of Use

g. Parking – Receipt required except for parking meters.

h. Telephone/Internet Service

Telephone receipt showing business-related numbers

Internet service – receipt required – hotel bill

Travel Conferences

f. Documentation Required – Other

- a. Purchase Order
The purchase order shall be duly signed by the School Business Administrator.
- b. Travel Report (Copy)
The Travel Request Form shall be completed and signed by the Supervisor noting prior approval dates. Copies of the resolution of the conference shall be attached.
- c. Board of Education Resolution (Copy).
- d. Executive County Superintendent approval (if applicable)
- e. Copy of Travel Report
All persons authorized to travel shall prepare and submit a brief report explaining the travel event. A copy of the travel report shall be submitted with the purchase order for reimbursement.
- f. Envelope – Receipts
All original receipts with the date and time of expense incurred shall be placed in an envelope and attached to the Travel voucher.

Attachments to Purchase Order

All required documentation required shall be attached to the purchase order requesting reimbursement.

Receipts

Actual and original receipts are required. Credit card statements shall not be accepted as documentation of expenses.

Reimbursement Payment

The School Business Administrator shall not approve or issue payment until all required documentation has been submitted and verified.

Deadline to Submit Reimbursement – June 30th

All outstanding travel vouchers for the school year ending June 30th shall be submitted as soon as possible after June 30th regardless of the amount, notwithstanding. N.J.A.C. 6A:23A-7.13(f)

[Travel Reimbursement Checklist](#)

A Travel Reimbursement Checklist has been provided to assist in the reimbursement process.

Travel Conferences

g. Miscellaneous Provisions

1. Advance Payment -- Prohibited

No employee or school board member shall receive any monies for travel in advance of the travel. The payment of travel expenses shall be made personally by a school district employee or board member and reimbursed at the conclusion of a travel event. This applies to travel-related purchases for which a purchase order is not applicable. This section does not preclude the district from paying the vendor directly with the proper use of a purchase order (e.g., for registration, airline tickets, hotel). *Ref. N.J.S.A. 18A:11-12(j)*

2. Exclusions from Travel Policy

In accordance with N.J.S.A. 18A:11-12(m) the Board of Education recognizes that travel procedures may be included in some employee contracts. Furthermore, there may be statutory requirements or federal regulatory requirements that may lead to an employee's or board member's travel. If any condition in a negotiated contract, in any administrative regulation or any statute, is in conflict with these regulations, the provisions of the contract, regulation, or statute shall prevail.

3. Travel Report Required

In accordance with N.J.S.A. 18A:11-12(d) every employee and board member is required to submit a brief report within at least thirty (30) days explaining the following:

- Primary purpose for the travel;
- Key issues addressed at the event; and the
- Relevance to improving instruction and/or the operation of the school district.

Board members are to provide the report at the Board meeting that follows the travel.
Employees
are to file the report with their immediate supervisor.

A copy of the travel report is to be submitted to the Business Office as an attachment to any purchase order for travel reimbursement.

4. Travel Charge Cards -- Prohibited

Use of travel charge cards is not authorized for use by school districts.

5. Travel – Paid by Employee

All travel, where part or the entire cost is paid by the employee, requires the approval of the Superintendent or Designee and the Board of Education, prior to the travel event.

Travel Conferences

6. One Day Trips

One day trips are only eligible for reimbursement for conference registration, mileage, tolls are meets and reasonable parking costs.

7. Employee/Parent Travel – Personal Business Days

Employees who travel as a parent to a conference designed for parents and/or parental involvement shall apply to be absent from work using personal business days.

8. Retreats – School District Employees with Board Members

Retreats are meetings with school district employees and school board members, held away from the normal work environment at which organizational goals and objectives are discussed. If available, school district facilities shall be utilized for this type of event. N.J.S.A. 18A:11-12(a)(1)(d).

- Lunch or Refreshments – Onsite – Prohibited

Lunch or refreshments for retreats held within the school district are prohibited.
N.J.A.C. 6A:23A7-8(a) (6)

- Lunch and Refreshments – Offsite – Permitted

Lunch and refreshments for training sessions may be authorized for an amount up to \$7.00 per person only when it is necessary that employees or board members remain at a site other than the school district and there are no viable options for lunch at the offsite location.
(N.J.A.C. 6A:23-7.12(c)) (N.J.A.C. 6A:23A-7.12(c)(3))

Travel Conferences

h. Travel Violations—Monitoring/Compliance

All travel will be monitored to ensure compliance as follows:

Office of the Superintendent or Designee

The Office of the Superintendent or Designee, in conjunction with the Superintendent, shall review all requests for travel to ensure compliance with the law, code, policy and administrative rules. Any employee who violates the law, code, policy or rules shall be subject to the penalties assigned in N.J.S.A. 18A:11-12(s).

Office of the School Business Administrator

The Office of the School Business Administrator shall review all requests for travel reimbursement to ensure compliance with the law, code, policy and administrative rules in accordance with N.J.A.C. 6A:23A-7.6(c).

Board of Education

If, on occasion, there is a Board of Education member who violates the school district's travel policy, law, or code, it shall be reported to the full Board of Education, who shall by board resolution, initiate sanctions outlined in N.J.A.C. 6A:23A-7.7(c) against said board members.

i. Sanctions for Violations of Travel Requirements

Maximum Travel Violations

Any board that violates its established maximum travel expenditure as set forth in N.J.A.C. 6A:23A-7.3 above, or that otherwise is not in compliance with the travel limitations set forth in this section may be subject to sanctions by the commissioner as authorized pursuant to N.J.S.A. 18A:4-23 and N.J.S.A. 18A:4-24, including reduction of State aid in an amount equal to any excess expenditure pursuant to N.J.S.A. 18A:11-12 and N.J.S.A. 18A:7F-60.

Travel Approval Violations; Approval Authority – Superintendent or Designee

A person who approves any travel request or reimbursement in violation of the district's policy or these rules shall be required to reimburse the school district in an amount equal to three times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12. In accordance with N.J.A.C. 6A:23A-7.7(b) (1) the approval authority for travel for the District is the Superintendent or Designee.

They shall be subject to all penalties as outlined in this section.

Travel Conferences

Travel Reimbursement Approval Authority – School Business Administrator

The School Business Administrator is designated as the travel reimbursement approval authority. The SBA shall review and approve all requests for travel expenditure reimbursements pursuant to N.J.A.C. 6A:23A-7.6(c) and shall be subject to all penalties as outlined in N.J.A.C. 6A:23A-7.7(b).

j. Sanctions for Violations of Travel Requirements (continued)

Travel Violations - Employees

An employee or board member who violates the school district's travel policy or these rules shall be required to reimburse the school district in amount equal to three times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12.

Ref. N.J.S.A. 18A:11-12(s), N.J.A.C. 6A:23A-7.7(c)

Violations of Administrative Code – Loss of State Aid

Any district Board of Education that violates its established maximum travel expenditure or that otherwise is not in compliance with the travel limitations set forth in this section may be subject to sanctions by the Commissioner including reduction of State aid in an amount equal to any excess expenditure.

Ref. N.J.S.A. 18A:11-12(r)

Travel Conferences

k. Board of Education Members -- Travel Provisions – Approval Process

All Board of Education members are subject to the terms and conditions listed in the Board policy and N.J.S.A. 18A:11-12 et seq. and N.J.A.C. 6A:23A-7.1 et. seq., with the following specifically noted:

Approval of Travel – Prior Approval Needed – Ref. N.J.A.C. 6A:23A-7.4(b)

All travel for board members shall occur only upon prior approval by a majority of the full voting membership of the Board and the travel shall be in compliance with N.J.S.A. 18A:12-24 and N.J.S.A. 18A:12-24.1.

Pursuant to N.J.A.C. 6A:23A-5.9(c), written approval is needed from the Executive County Superintendent if:

- An out of state travel event has a total cost that exceeds \$5,000 – regardless of the number of attendees; or where
- Six (6) or more individuals from the district are to attend the same out of state travel event.

Voting on Travel

Board members must recuse themselves from voting on travel where the board member, a member of his immediate family, or a business organization in which he has an interest, has a direct or indirect financial involvement that might be expected to impair his objectivity or independence of judgment.

No board member shall act in his official capacity in any matter where he or a member of his immediate family has a personal involvement that is or creates some benefit to the school official or member of his immediate family; or undertake any employment or service, whether compensated or not, which might reasonably be expected to prejudice his independence of judgment in the execution of his official duties. Ref. N.J.S.A. 18A:18A:11-12(k)(l)

The Board of Education is prohibited from approving any travel resolution after the travel has been completed.

Attendance at Conference

Travel Request Form Executive County Superintendent Approval

This form is to be used only for Out of State travel that meets one of the following:

- Total cost of out of state travel exceeds \$5,000.00
- More than 5 or more individuals attend the same out of state travel event

The form is to be completed by the Superintendent or Designee's Office and submitted to the Business Office for submission to the Executive County Superintendent's approval.

Travel Reimbursement Checklist

School Official _____

Travel Date(s) _____

The following items must be attached to all purchase orders for travel reimbursement. The School Business Administrator shall not approve or issue payment until all required documentation and information have been submitted and verified.

- _____ A. **Purchase Order**
The purchase order for reimbursement shall be duly signed by the School Business Administrator.
- _____ B. **Travel Request Form – Copy**
The Travel Request Form shall be completed and signed noting prior approval dates. Attached must be a copy of the itinerary and/or agenda of the travel event.
- _____ C. **Board of Education Resolution – Copy**
- _____ D. **Executive County Superintendent Approval document (if applicable)**
- _____ E. **Travel Voucher Form – Original**
The Travel Voucher Form submitted shall document all expenses and be signed with the original signatures of the employee **and Superintendent or Designee**. The School Business Administrator shall sign the document upon review of all expenditures.
- _____ F. **GSA Meals/Incidental Worksheet -- Certified**
- _____ G. **Envelope -- Receipts**
All original receipts with date and time of expense incurred shall be placed in an envelope and attached to the Travel Voucher.
- _____ H. **Copy of Travel Report**
All persons authorized to travel shall prepare and submit a brief report explaining the travel event. A copy of the travel report shall be submitted with the purchase order for reimbursement.
- _____ I. **Personal Vehicle Documentation (If applicable)**
Copy of the Vehicle Registration
Copy of the Insurance Identification Card
- _____ J. **Travel Mileage Commute Worksheet with documentation (If applicable)**
 - Mapquest
 - Google Maps
 - Yahoo Maps

REQUEST FOR OUT OF STATE TRAVEL

FOR MORE THAN 5 INDIVIDUALS

OR AMOUNT GREATER THAN \$5,000 APPROVAL

Directions: Complete a form for each individual in the district requesting to attend an out-of-state travel. Incomplete forms and those without the required documentation and signatures will be returned unsigned to the district. All travel must have prior board approval. For information related to lodging and per diem rates, refer to <http://www.gsa.gov>, and for eligible subsistence/reimbursement, refer to N.J.S.A. 18A: 11-12; N.J.A.C. 6A:23A-5.8; 5.9 and New Jersey OMB **Circulars:** 06-14-OMB and 08-19-OMB.

District Name: Plainfield Board of Education **Request Submission Date:** _____

Name of Event: _____ **Event Location:** _____

District Contact Name: Rashon K. Hasan **Phone:** 908-731-4344 **Fax:** 908-731-4345

JUSTIFICATION OF NEED

Provide a justification of need:

- 1) Relationship of attendance at this event to the critical instructional and operational needs of the District, including, link to the Core Curriculum Content Standards;
- 2) Explanation as to how those attending will share what they: learned with others in the school district;
- 3) Documentation that the knowledge and information to be gained at this conference, cannot be obtained through more cost effective means; and
- 4) Explanation as to how the request is consistent with best practices in professional development.

AGENDA/ITINERARY: For each day, include the title and time of workshops to be attended. Attach the itinerary.

Superintendent Signature: _____ **Date:** _____

School Business Administrator Signature: _____ **Date:** _____

District Board of Education approval date: _____

PARTICIPANTS' NAME(S) TITLE Departure Date/Time Returning Date/Time

Indicate type of Travel Event:

- Training/Seminar Convention/Conference — Regular School Business Retreat
 Other (specify)

FUNDING BREAKDOWN

Registration: \$ _____ Meals: \$ _____ Other Costs Mileage: \$ _____

Airfare: \$ _____ Parking: \$ _____ Tolls \$ _____

**Lodging: \$ _____ Taxi: \$ _____ Requested: \$ _____

* **Other Costs** (provide explanation and breakdown): _____

Account(s) Budgeted: _____ Total Amount in Budgeted Account: \$ _____

*** **For lodging, indicate if the hotel is the site of event/conference*****

List goals and objectives from the district's Professional Development Plan: _____

For County Office Use Only

Approval Granted: _____ Request Denied: _____ No Action Taken

Approved Costs: _____

Registration: \$ _____ Meals: \$ _____ Other Costs: \$ _____

Airfare: \$ _____ Parking: \$ _____ Total Approved: \$ _____

Lodging \$ _____ Taxi: \$ _____

Executive County Superintendent Signature _____ Date _____

Travel Conferences

The following should be attached to each Travel Request Form:

- Per Diem Rates – these may be ascertained for a particular destination from “ www.gsa.gov ” website. Upon entering the site select the state to get the allowable amounts for Max. Lodging; M&IE Rate, first and last day rates. You may also access the State Tax Rates & Exemption Forms from this site for your selection.
- Attach the conference lodging sheet --- if the hotel is not on the conference form or exceeds the allowable amount then an explanation must be accompanied with the submittal
- Airfare – include a copy of the flight destination along with any additional flight charges
- Include the costs for transfers, taxis and parking
- Driving mileage should be attained from “Map Quest” and a copy attached with the calculated cost for reimbursement
- Signatures from the Superintendent of Schools and Business Administrator should be on the forms
- Attach the Board approved resolution authorizing attendance

Regulations in the NEW JERSEY ADMINISTRATIVE CODE TITLE 6A. DEPARTMENT OF EDUCATION CHAPTER 23A. SCHOOL DISTRICT FISCAL ACCOUNTABILITY, EFFICIENCY AND BUDGETING PROCEDURES (Phase I & Phase II Combined)

6A:23A-5.9 Out-of-State and high cost travel events

(a) Reimbursement for all in-State and out-of-State travel shall be made pursuant to N.J.S.A. 18A:11-12.

(b) Out-of-State travel events shall be limited to the fewest number of board members or affected employees needed to acquire and present the content offered to all board members or staff, as applicable, at the conclusion of the event. Where the event is sponsored by a New Jersey-based organization and targeted to employees and/or board members of New Jersey school districts, reimbursement for lodging may be permitted only where the sponsoring organization obtains a waiver pursuant to the provisions of N.J.A.C. 6A:7.11. Where the event is national or regional in scope and targeted to school district employees and/or board members from multiple states, reimbursement for lodging may only be provided if the event occurs on two or more consecutive days and where home to event commute exceeds 50 miles.

(c) Where a travel event has a total cost that exceeds \$5,000, regardless of the number of attendees, or where more than five individuals from the district are to attend a travel event out-of-state, the school district or county vocational school district shall obtain the prior written approval of the Executive County Superintendent. The executive county superintendent shall promptly review the request and render a written decision within 10 working days.

(d) For all employee and board member travel events out of the country, regardless of cost or number of attendees, the school district or county vocational school district shall obtain the prior written approval of the Executive County Superintendent. Such requests must be supported by detailed justification. The executive county superintendent shall promptly review the request and render a written decision within 10 working days. It is expected that approvals will be rare.

Attendance at Conference

Travel Reimbursement Expense Voucher

The attached Travel Reimbursement Voucher is to be completed and attached to the purchase order for a reimbursement of travel expenses.

The Superintendent or Designee's signature is required prior to submission to the Business Office.

The School Business Administrator will sign upon verification of receipts and documents.

TRAVEL REIMBURSEMENT VOUCHER

***This form must be submitted within 10 days following board/employee's return from workshop/conference.
Please print and attach the original receipts.***

Name _____ Position _____

Street _____ Budget Line _____

City/State/Zip Code _____ Received by: _____

Title of Workshop/Conference _____

DATE	HOTEL/TRAVEL COSTS				MEAL COSTS*			TRANSPORTATION (airfare/train)	TOTAL AMOUNT
	HOTEL	MILEAGE	TOLLS	TAXI	BREAKFAST	LUNCH	DINNER		
GRAND TOTAL									

**Mileage from school or home, whichever is the shorter distance.*

BOARD/EMPLOYEE'S CERTIFICATION

I certify that the above expenses were incurred on behalf of the Board. I have submitted Travel Report and/or Board Training Report. I also certify that the above expenses are correct in all respects. The dates therein specified, and the amounts charged have been actually paid for traveling expenses. Original itemized receipts are attached.

Board/Employee's Signature _____

Date _____

Supervisor's Signature _____

Date _____

Travel Report Requirement

Statutory requirements:

After the event, **attendees must provide a brief report** that includes a description of the primary purpose for the travel, and a summary of the goals and key issues that were addressed at the event and their relevance to improving instruction or the operation of the school district. [P.L. 2007,c. 53; travel requirements at N.J.S.A. 17A:11-13]

Brief description of the primary purpose for the travel:

Statutory Requirement—Travel Report

In accordance with N.J.S.A. 18A:11-12(d), every employee is required to submit a brief report within ten (10) days or prior to receiving reimbursement:

- Primary purpose for the travel;
- Key issues addressed at the event; and the
- Relevance to improving instruction and/or the operation of the school district.

Board members are to file the reports with the Business Administrator.

Employees are to file the report with their immediate supervisor.

A copy of the travel report is to be submitted to the Business Office as an attachment to any purchase order for travel reimbursement.

Summary of the goals and key issues that were addressed at the event	Relevance to improving instruction and/or the operation of the school district

Name: _____

Place of event and date of travel: _____