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Policy 935: Staff and School Committee Travel and Reimbursement

Adopted 3/14/18

Statement of Philosophy on Staff and School Committee Travel

The Shrewsbury School Committee supports the concept of cost-effective employee travel when it relates to fulfilling one’s job responsibilities, professional development, or furthering the district’s strategic priorities or goals. Likewise the School Committee encourages the use of video-conferencing and contracting for on-site staff training when doing so is more cost-effective than traveling and/or more convenient for staff.

All work-related travel must have the pre-approval of staff supervisors prior to making arrangements or financial commitments. Unapproved travel may not be reimbursed by the District. In order to receive reimbursement, all staff or School Committee members must complete required forms and submit receipts or proof of payment that satisfies any pertinent state law, School Department administrative regulations, and Town Accountant’s Office regulations.

It is the intent of this policy to ensure that staff expenses related to travel do not incur a financial hardship to employees and to also recognize that some benefits of staff-related travel [i.e. furthering one’s training or accruing PDP’s] accrue to employees. As such, it is not intended that the District will reimburse 100% of staff-related costs in all situations for business travel. Employees are referred to the section below titled *Unreimbursed Expenses Advisory* for more information.

Costs Prohibited from Reimbursement

Certain items or services that may be a routine part of one’s lifestyle and incurred while on work-related travel will not be reimbursed by the District. These are listed below. It is noted that the District and Town Accountant reserve their rights to limit or exclude other expenses, not listed below, but deemed inappropriate or excessive.

- Any item or service considered illegal by federal, state, or local laws
- Alcohol of any type
- Tobacco or vaping products of any type
- In-room or in-flight movies or entertainment services
- Costs incurred by employees in violation of local venue laws or ordinances such as parking tickets, traffic violations, fines, or citations

Spouse/Partner/Family Member Accompanying Employee

Employees may bring a spouse, partner, or family member on District-related travel so long as no additional or increased costs are incurred by the District and the employee’s participation or experience in the conference, workshop, or other type of work-related event is not diminished.

The District takes no financial, legal, or other type of responsibility for the staff member’s traveling companion.

Reimbursement Categories: Allowances and Limitations

- a) **Mileage Reimbursement:** Employees who do not receive a travel allowance will be reimbursed for mileage for travel to pre-approved conferences or work-related events outside their normal workplace. If an employee receives a travel allowance with stipulations, such as applying to routine business travel within a certain mileage radius, the employee will be reimbursed for mileage for travel to pre-approved conferences or work-related events that do not qualify under the terms of the allowance. The reimbursement rate will be the current Internal Revenue Service [IRS] annual rate as published for January 1st of each calendar year.
- b) **Lodging:** When overnight travel is required and approved, employees are encouraged to make arrangements in places that balance overall cost-effectiveness and employee safety. Employees should survey recommended lodging by conference sponsors along with other nearby accommodations, while taking into account all related lodging, transportation, parking or complimentary meals to derive the most cost-effective and safe lodging. In addition to the factors listed above, time and convenience factors should also be considered in order to leverage the benefits of the conference as part of overall cost-effectiveness.
- c) **Air or Train Travel:** Staff shall always travel in the most cost-effective “coach” or “economy” airline or train seats and survey available flights that match the travel requirements.
- d) **Regional Transportation:** It is strongly encouraged that staff use free hotel shuttles when available. Otherwise staff should survey the most cost-effective and safe means of ground transportation when traveling. Buses, subways, and ride-shares (e.g., Uber, Lyft) are more preferable than rental cars. If rental cars are necessary, only “economy”, “compact” or “mid-size” should be rented. Rental car vehicles in the “Premium”, “Luxury”, “Sports Utility Vehicles [SUVs]”, or “Convertible” classes are prohibited. Situations involving persons with disabilities, staff traveling as a group, or physical size of staff will be considered on a case-by-case basis.
- e) **Meals and Incidentals:** When no overnight travel is required, staff may be reimbursed for meals purchased by providing original receipts. However, the maximum reimbursement limits, including gratuity, per meal are: \$8 for breakfast, \$12 for lunch, and \$20 for dinner regardless of actual employee cost incurred.

Staff who are approved for overnight travel will receive a daily per diem of \$40 for each full day of travel for meals and incidentals. Actual days of travel to and from conferences will be pro-rated at 75% or \$30 per diem since fewer meals will need to be purchased. Per diem pay should be claimed on the employee expense form and no meal receipts are to be submitted.

If the conference cost includes meals then the per diem allowance will be reduced accordingly by the meal limits specified above. For example, if the conference cost includes lunch, then the per diem would be reduced by \$12.

- f) **Parking and Tolls:** Staff will be reimbursed for parking and tolls and expected to seek out the most cost-effective and safe routes of travel and parking areas.
- g) **Gratuities:** Reasonable and customary gratuities may be claimed on the employee expense reimbursement form. It is understood that in some cases no receipt can be provided for certain gratuities as they typically made by cash with no receipt expected by the payer.

Reimbursement and Expense Documentation Procedures

In order to receive work-related expense reimbursement all staff and School Committee members are required to submit the current staff expense reimbursement form. All claims for reimbursement, with the exception of per diem pay for meals and incidentals, must be substantiated with original receipts or documentation determined sufficiently authentic

and specific so as to be reimbursed. The School Department and Town Accountant reserve their rights to decline reimbursement when either party deems expense documentation to be deficient in substantiating an expense. Claims for staff reimbursement will be processed in a timely manner upon completion of all requirements and paid out via the Town's regular warrant process.

Unreimbursed Expenses Advisory

Staff are directed to Internal Revenue Service *Publication 463: Travel, Entertainment, Gift, and Car Expenses* and other IRS information that may be published on this topic. The District cannot offer employees tax-related advice on this topic. Employees should seek tax advice from tax professionals if they have questions that are not answered in the aforementioned references.

Ethical Considerations

Section 3 of Massachusetts General Law Chapter 268A prohibits state, county, or municipal employees from soliciting or accepting anything of substantial value for or because of any official act they have performed or will perform. Employees are advised that any offer of corporate-sponsored travel, conferences, or alike may fall into this category, and may require prior approval and disclosure per Massachusetts laws and regulations. If in doubt, employees should consult with their supervisor and/or the State Ethics Commission if they have questions.

This policy will be reviewed within five years of adoption.

References:

MGL c. 44, Section 58

MGL c. 268A

Massachusetts Office of the Inspector General: *Guide to Writing Effective Travel Policies*