



NEBO SCHOOL DISTRICT BOARD OF EDUCATION POLICIES AND PROCEDURES

SECTION: D - Fiscal Management
POLICY TITLE: Personnel Travel
FILE No.: DLC
DATED: July 10, 2019

TABLE OF CONTENTS

1. PURPOSE AND PHILOSOPHY
 2. PERSONNEL TRAVEL REQUEST AND AUTHORIZATION FORM
 3. PAYMENTS TO EMPLOYEES FOR TRAVEL COSTS
 4. PAYMENT FOR NON-EMPLOYEE TRAVEL
 5. MEALS AND INCIDENTALS
 6. MILEAGE
 7. AIRFARE
 8. LODGING
 9. OTHER TRAVEL EXPENSES
 10. CONFERENCES AND CONVENTIONS
 11. VEHICLE RENTAL
 12. ACCIDENT PROCEDURES
 13. PRIVATE AND DISTRICT VEHICLE USE FOR SCHOOL BUSINESS
 14. DRIVING RESTRICTIONS
 15. PROHIBITED ACTIVITIES
-

1. PURPOSE AND PHILOSOPHY

In order for the authorized personnel of Nebo School District to carry out their assignments in fulfilling the District's mission, the policy of the Board of Education is to support and to provide reimbursement for essential travel expenses. Schedules should be arranged to minimize the amount of travel and expense to the District. District personnel and officials who incur expenses while carrying out their authorized duties will be reimbursed by the District upon submission of a properly completed and approved District travel log and payment request form with such supporting receipts as required. A traveler on official school business will be expected to exercise the same care in incurring expenses that a prudent person would exercise in traveling on personal business.

2. PERSONNEL TRAVEL REQUEST AND AUTHORIZATION FORM

- 2.1** When traveling outside Utah or whenever travel involves an overnight stay the Personnel Travel Request and Authorization Form ("Travel Request") will be completed by employees requesting to travel and submitted to their supervisors for approval prior to final, nonrefundable travel arrangements being made. If approved by the supervisor, the Travel Request will be submitted by the supervisor to the appropriate director for approval. If approved by the director the Travel Request will be submitted by the director to the Superintendent for approval.
- 2.2** Contemplated travel should be discussed with the supervisor prior to the preparation of the Travel Request. Travel Requests should be submitted well in advance of the travel so that the lowest costs may be obtained.

- 2.3 Approved Travel Request forms will be maintained in the Superintendent's office and available to the Board of Education for review.

3. PAYMENTS TO EMPLOYEES FOR TRAVEL COSTS

- 3.1 All requests for reimbursement for mileage and other actual travel costs and payments for meal and incidental expense per diems should be made on District payment request forms and supported by travel logs, meeting or conference agendas, and receipts as applicable. The travel log must document each starting point and destination and describe the District business purpose for the travel. Requests for reimbursement of expenses should be made monthly unless the expenses to be reimbursed are less than \$100 in which case the expenses may be held over and combined with expenses from subsequent months until the amount equals or exceeds \$100. Notwithstanding this provision, requests for reimbursement should not be for expenses older than six (6) months.
- 3.2 Unless exceptional circumstances exist, employees should not use personal funds or personal credit cards for travel expenses for airfare, lodging, conference and convention registration fees, or vehicle rental and subsequently receive reimbursement from the District. Travel arrangements of this sort should be secured using District payment methods.

4. PAYMENT FOR NON-EMPLOYEE TRAVEL

When a non-employee will accompany an employee on District assignments requiring travel, it may be practical to make travel arrangements for the non-employee at the same time arrangements are made for the employee. It may also be practical to use the District payment method to secure the travel arrangements for both individuals. In these cases, payment from the employee for the non-employee's portion of the cost must be received by the District Finance Department within two (2) weeks of the booking of the travel and prior to the District making payment for the travel arrangements.

5. MEALS AND INCIDENTAL EXPENSES

- 5.1 Schedules should be arranged to minimize the cost of meals to be paid or reimbursed by the District. It should seldom be necessary, for instance, to arrange internal business discussions over lunch at District expense.
- 5.2 Instead of reimbursement of actual meal and incidental expenses (M&IE) incurred by employees during assignments requiring travel, the District compensates employees for these costs based on per diem rates as described in this section.
- 5.3 Employees should not use District credit cards or purchasing cards to purchase meals or pay for incidental expenses while on District assignments requiring travel. They should instead request payment based on the per diem rates described in this section.
- 5.4 Incidental expenses are minor expenditures associated with travel. These expenses comprise an immaterial part of the travel costs that a person might incur including, but not limited to, baggage handler tips and room service tips, and are included in the M&IE per diem paid to employees.
- 5.5 The M&IE per diem payment for District employees traveling within the State of Utah will be made up to the currently existing lowest standard rate in the State of Utah for M&IE as established by the U.S. General Services Administration (GSA) for federal employees, which is periodically adjusted by the GSA.

- 5.6 The M&IE per diem payment for District employees traveling outside the State of Utah will be made up to the currently existing rates for M&IE for the specific travel destinations as established by the GSA for federal employees, which is periodically adjusted by the GSA.
- 5.7 If meals are complimentary or included in the registration fee for an event or provided by a hotel as part of the lodging cost, the per diem value of those meals should be excluded from the payment request whether the complimentary or included meals were consumed or not.
- 5.8 In the event of multiple-day travel situations, the per diem rate for the first and last days of travel shall not exceed the rate shown for the first and last day of travel as established by the GSA for federal employees, which is periodically adjusted by the GSA. In general, this is seventy-five percent (75%) of the full day per diem rates.
- 5.9 Employees completing the Travel Request may refer to the current GSA M&IE rates at the GSA website, www.gsa.gov, by searching or selecting the topic "Per Diem Rates."

6. MILEAGE

Mileage for reimbursement is to start from the assigned job location. Occasionally, in emergency situations or when mileage can be conserved, travel may start from another location such as an employee's residence. Travel should be organized so as to minimize travel expenditures. When official travel by personally owned vehicles has been authorized, mileage reimbursement will be made up to the currently existing standard mileage rate established by the Internal Revenue Service for business use, which is periodically adjusted by the Internal Revenue Service. An employee who elects to drive his/her personal vehicle when airfare is more economical may be reimbursed for the lowest documented cost of the airfare for the associated dates of travel and not for the miles driven.

7. AIRFARE

- 7.1 Travel involving airlines may be arranged through the District Operations Department, the school, or through the employee's department at the discretion of the principal or department supervisor.
- 7.2 All airline tickets should be purchased at the lowest reasonable rates after considering factors such as cost, timing of flights, scheduled lay overs, and airport proximity to scheduled meeting and events.
- 7.3 Payments to secure airfare shall be made in accordance with purchasing policies and procedures and authorized payment methods established by the District.

8. LODGING

- 8.1 Lodging may be arranged through the District Operations Department, the school, or through the employee's department at the discretion of the principal or department supervisor.
- 8.2 Lodging should be purchased at the lowest reasonable rate after considering factors such as cost, location, and proximity to scheduled meetings and events.
- 8.3 Lodging must be reasonably necessary for the length and purpose of the trip.
- 8.4 Payment for deposits needed to hold lodging and for confirming reservations shall be made in accordance with purchasing policies and procedures and authorized payment methods established by the District.

9. OTHER TRAVEL EXPENSES

- 9.1** Employees may use District credit cards or purchasing cards to pay for other authorized travel expenses not otherwise covered in this policy while on District assignment requiring travel. Examples include parking fees and baggage check fees.
- 9.2** Upon return from approved travel, the District will reimburse employees for the cost of actual, authorized travel expenses not otherwise covered in this policy if they were paid with personal funds.

10. CONFERENCES AND CONVENTIONS

- 10.1** Attendance at all conferences and conventions is to serve the educational goals of the District. It is not the intent of the Board of Education to authorize travel to conferences and conventions as a matter of routine attendance. Employees, including Board members, working their last year in the District should not plan to attend conferences and conventions outside of Utah unless their attendance is required as an officer, presenter, or honoree.
- 10.2** The payment of registration fees for conferences and workshops shall be made in accordance with purchasing policies and procedures and authorized payment methods established by the District.

11. VEHICLE RENTAL

- 11.1** All vehicle rentals for business purposes should be arranged through the State of Utah's travel contract via the District's Operations Department, unless it can be shown that no automobile was available: (a) at the time needed; (b) at the place needed; or (c) of the type needed.
- 11.2** The largest vehicle that may be rented is a vehicle with a seating capacity of no more than ten passengers, including the driver.
- 11.3** If a vehicle is not rented through the Operations Department, vehicle insurance shall be secured to provide liability coverage in the amount which meets or exceeds the minimum insurance coverage required for the state in which the vehicle is licensed. The required insurance coverage may be satisfied by combining coverage from the driver's personal automobile policy and insurance coverage purchased from the rental agency. If the driver's personal automobile policy does not extend full collision damage coverage to the rented vehicle, a collision damage waiver must be purchased as part of the rental contract.
- 11.4** In order to provide appropriate liability coverage, only individuals listed as authorized drivers on the rental agreement are allowed to drive the vehicle.

12. ACCIDENT PROCEDURES

In the case of an accident involving a District vehicle, a rented vehicle, or a private vehicle being used for District purposes, employees should follow these procedures:

- 12.1** Call the police.
- 12.2** Call and notify the District's Risk Manager and appropriate principal or supervisor.
- 12.3** Request a copy of the Driver Exchange Report from the investigating police officer. If such a report is unavailable, request the officer's name, contact information, and a case number.

- 12.4 If possible and appropriate under the circumstances, document information concerning the accident, such as the: (a) date, time, weather, and exact location; (b) person driving the vehicle; (c) other party's insurance information; (d) description and probable cause; (e) names and contact numbers of witnesses; (f) description of property damage and drivability of the vehicle, injured person(s), and complaint(s) of injury.
- 12.5 If possible and appropriate under the circumstances, photographs should be taken of any property damage and various views of the accident scene.
- 12.6 If the accident involves a rental vehicle, call the rental company and report the accident.
- 12.7 Employees and volunteers who are involved in an "at-fault" accident shall not be allowed to operate District or private vehicles while on school business until the accident and driving privileges have been reviewed by the District's Risk Manager. The District's Risk Manager may require the employee or volunteer to complete the District's approved driver safety course in order to maintain driving privileges. This driver safety training shall be in addition to any District imposed discipline, corrective action, or counseling.

13. PRIVATE AND DISTRICT VEHICLE USE FOR DISTRICT PURPOSES

- 13.1 Employees who operate a District, rental, or private vehicle shall complete the District's approved driver safety training course prior to operating a vehicle for any job-related purposes. District personnel shall also complete the driver safety training course periodically thereafter in accordance with the State of Utah Risk Management guidelines.
- 13.2 The largest vehicle that school district personnel can operate is a vehicle with a seating capacity of no more than ten passengers, including the driver.
- 13.3 Out-of-state travel in a private or District vehicle for District or school business is strongly discouraged and requires written approval from the principal or supervisor and the District's Risk Manager.
- 13.4 Insurance coverage for private vehicles used for District purposes shall comply with the minimum standards required by Utah State law. Primary vehicle coverage is the responsibility of the insurer of the private vehicle. The District's vehicle insurance policy does not extend primary property damage coverage, primary liability coverage, of personal injury protection (PIP) coverage to private vehicles, but will extend secondary liability coverage after the liability limits of the private vehicle insurance policy have been exhausted.

14. DRIVING RESTRICTIONS

District personnel who operate either a private or a District vehicle for District or school business, as set forth in this policy, shall adhere to the following restrictions:

- 14.1 A single driver shall:
 - 14.1.1 Drive no more than a maximum of ten (10) hours per day.
 - 14.1.2 Take frequent breaks while driving (i.e., rest, food, refuel, etc.).
 - 14.1.3 Drive during daylight hours as much as possible.
 - 14.1.4 Rest a minimum of eight (8) hours after driving ten (10) hours in a day.

- 14.1.5 Not drive between 1:00 a.m. and 5:00 a.m.
- 14.1.6 Comply with any and all applicable traffic and safety laws, including the use of seatbelts, while operating the vehicle.

14.2 Multiple drivers shall:

- 14.2.1 Drive no more than a maximum of fourteen (14) hours per day.
- 14.2.2 Take frequent breaks (i.e., rest, food, refuel, etc.) and change drivers often while driving.
- 14.2.3 Drive during daylight hours as much as possible.
- 14.2.4 Rest a minimum of eight (8) hours after driving fourteen (14) hours in a day.
- 14.2.5 Not drive between 1:00 a.m. and 5:00 a.m.
- 14.2.6 Comply with any and all applicable traffic and safety laws, including the use of seatbelts, while operating the vehicle.

14. PROHIBITED ACTIVITIES

Employees and volunteers who travel for District or school business may not engage in behavior or activities that reflect negatively on the District; place employees, students, or others in harm; or incur civil or criminal liability. Specifically, individuals traveling with students are considered to be on duty during the entirety of the trip regardless of location, time of day or night, or number of other supervisors present or said to be supervising. Supervisors traveling with students are never considered off duty and must therefore abide by Nebo School District Policy GBCC, *Alcohol and Drug-Free Workplace* at all times. Individuals who may be operating a vehicle, whether personal, District, or owned by a third party, are bound by the prohibitions found in Policy GBCC.

EXHIBITS

None

REFERENCES

Nebo School District Policy DJB, *Purchasing*
Nebo School District Policy GBCC, *Alcohol and Drug-Free Workplace*

FORMS

Personnel Travel Request and Authorization Form

HISTORY

Revised – July 10, 2019. Clarify provisions on travel requests, mileage, and lodging; allow reimbursement for travel to accumulate to \$100 or 6 months before submission; made technical changes.

Revised – April 11, 2018. General clarifications, updates, and technical corrections made throughout.

Revised – January 8, 2014. Added section on prohibited activities; made technical changes.

Revised – September 12, 2012. Clarified per diem rate.

Revised – July 8, 2009. Added sections on vehicle rental, accident procedures, insurance, and driving restrictions.

Adopted or revised – March 14, 2007.
