

TRUMBULL PUBLIC SCHOOLS  
TRUMBULL, CONNECTICUT

Policy Committee  
of the  
Trumbull Board of Education

Special Meeting

Long Hill Administration Building Conference Room  
Thursday, October 17, 2019 – 5:30 pm

AGENDA

		<u>Presenter*</u>	<u>Anticipated Action</u>
<b>I.</b>	<b>PRELIMINARY BUSINESS</b>		
	A. Call to Order / Introduction	JB	
	B. Correspondence	JB	
	C. Public Comment	JN	
<b>II.</b>	<b>POLICY REVIEW/DISCUSSION</b>		
	A. Reimbursement of Expenses, Policy Code 4133	JB	to BOE 1 <sup>st</sup> /2 <sup>nd</sup> Rdng. 10/29/19

**POLICY OVERVIEW FORM**

**Policy Title:** Reimbursement of Expenses for Approved Travel and Conference Attendance

**Section:** 4000      **Category:** Personnel – Certified and Non-Certified      **Code:** 4133

**New:**           **Revision:**   X  

**Initiated by:** Jonathan S. Budd, Ph.D., Asst. Super. of Curriculum, Instruction, & Assessments

**Phone No.:** (203) 452-4336      **Email:** jbudd@trumbullps.org

**Need for New Policy/Revision:** This policy, last revised in 2000, has been updated to reflect best practices for expense reimbursement, as applied to scenarios frequent to staff.

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**State Statute if applicable:** n/a

**Summary of Actions Required by New Policy/Revision:** See above.

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Please complete this form and send to the Office of the Superintendent, Trumbull Public Schools, 6254 Main Street, Trumbull, CT 06611

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**Office Use Only**

**Approval**

**Superintendent:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Policy Committee Chair:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**4133/Reimbursement of Expenses for Approved Travel/Conference**

TRUMBULL PUBLIC SCHOOLS  
BOARD OF EDUCATION  
POLICY MANUAL

SECTION: 4000  
CATEGORY: Personnel – Certified and Non-Certified  
POLICY CODE: 4133/Reimbursement of Expenses for Approved Travel/Conferences

**REIMBURSEMENT OF EXPENSES FOR APPROVED TRAVEL AND  
CONFERENCE ATTENDANCE**

**Policy Statement**

Staff will be reimbursed for all reasonable expenses incurred through attendance at approved professional and work-related activities as set forth in the policy regulations.

Employees will be reimbursed for expenses incurred as part of their work-related responsibilities based on the Regulations of this policy. This Policy and its Regulations apply to all funding sources related to the Board of Education, including, but not limited to, the Board of Education budget, all grants received by the Board of Education, and special revenue (205) accounts.

Adopted: 6/13/1988  
Revised: 8/1/2000, ?/?/2019

## 4133/Reimbursement of Expenses for Approved Travel/Conference

### Regulations

#### I. Expenses Associated with Professional Day Leave

##### ~~Request for Authorization to Attend Conferences or Workshops~~

##### ~~1. Notification of request~~

~~— Staff members planning to participate in out-of-district workshops or conferences are required to complete and submit the Request to Attend Conferences or Workshops form (Appendix A) to the Director of Curriculum at least one week prior to the date of the activity.~~

##### ~~2. Procedure for Approval~~

~~— The request must be approved by the immediate supervisor and building administrator of the staff member prior to submission to the Director of Curriculum at least one week before the activity.~~

##### ~~3. Funding~~

~~— Funding sources must be identified by account number. If funds are requested from the district-wide staff development account, the request must be approved by the Associate for Staff Development.~~

##### ~~4. Substitute Coverage~~

~~— The individual staff member is responsible for notifying the Personnel Department that substitute coverage will be required.~~

##### ~~5. CEU Credits~~

~~— If the conference/workshop presenter is not a CEU provider and the staff member wishes to receive CEU Equivalent Credits, the staff member is responsible for filing the appropriate forms with the Personnel Office prior to participating in the activity.~~

##### ~~6. Reimbursement for Workshop/Conference Expenses~~

~~— At the completion of the workshop/conference, requests for reimbursement, accompanied by appropriate receipts, must be submitted to the person(s) who approved the request.~~

#### A. General Pre-Approval Process

1. Employees seeking reimbursement of expenses associated with any professional day leave from the District must document all such proposed expenses on the Request for Professional Day Leave form developed by the Assistant Superintendent.
2. The form, with all relevant documentation, should be submitted to the Office of the Assistant Superintendent as far in advance of the requested professional day leave as possible, and no later than one week prior to the requested professional day leave, with approvals in advance from the relevant principal/supervisor of the employee.
3. Each proposed expense listed on the Request for Professional Day Leave form should be associated with a Board of Education budget line item account number, or other account number, supplied by the relevant principal/supervisor or by the Assistant Superintendent.

#### B. General Limitation on Expenses

##### Reimbursements for Employees

Reimbursements may be submitted for the attending employee only (costs for attending spouses are not reimbursable).

All expenses for which reimbursement is sought must relate directly to, and be submitted by, the applicable employee of the Board. Expenses for non-Board employees are not

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reimbursable. Employees are responsible for providing documentation clearly indicating their individual expenses.

### C. Specific Procedures for Expenses Related to Registration Fees

#### Allowable Expenses

~~A receipt or other invoice-like document must always be provided. Conference reimbursements must be settled immediately upon return.~~

1. When necessary and pre-approved, registration fees must be paid by staff in the Office of the Assistant Superintendent, except in emergency circumstances, in which case the Assistant Superintendent will advise the employee of the procedures to follow for purchase and documentation.
2. If registration fees must be paid by the employee, the employee must provide, for reimbursement, an original receipt and paid credit card statement if possible within 10 business days of return to the District, and in no case later than 30 calendar days after return to the District.

### D. Specific Procedures for Expenses Related to Transportation

#### Airline Travel

~~Staff members are required to use coach or economy class fares for domestic travel. (Purchasing tickets in advance when possible and convenient to take advantage of lower rates and use of Frequent Flyer rates are also recommended). When submitting receipts for reimbursement, include copy of related plane tickets with clear documentation of amount paid (statements from travel agencies are not acceptable). When electronic ticketing is used, a copy of the staff member's subsequent charge card billing receipt will be acceptable.~~

#### Travel Insurance

~~Any purchase of business travel insurance is at personal expense.~~

#### 1. Airline Travel

- i. When necessary and pre-approved, airline travel must be arranged in conjunction with the Business Manager in order to achieve the most competitive rates available for the employee's planned travel.
- ii. Purchase of tickets must be done by staff in the Business Office or the Office of the Assistant Superintendent, except in emergency circumstances, in which case the Business Manager will advise the employee of the procedures to follow for purchase and documentation.
- iii. Potential purchase of travel insurance will be discussed with the Business Manager, and approved on a case-by-case basis.

#### 2. Auto Rental

~~Staff members are authorized to rent intermediate or compact size automobile on business trips when economy, convenience, and a specific situation require their use instead of public transportation. Travel charges to and from the airport must always be based upon minimal costs. Private limousine fees are not acceptable.~~

- i. When necessary and pre-approved, auto rental must be selected by the employee based on the most competitive rates available for the employee's planned travel.
- ii. The employee must provide, for reimbursement, an original receipt and paid credit card statement if possible within 10 business days of return to the District, and in no case later than 30 calendar days after return to the District.

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### 3. Personal Automobile Use

#### Auto Mileage

- i. When necessary and pre-approved, employees will be reimbursed for mileage incurred through use of their personal automobile at the rate set by the Internal Revenue Service, provided, on a regular work day, that such mileage exceeds the distance the employee regularly travels to his/her worksite.
- ii. Requests for mileage reimbursement must indicate, using the Professional Day Leave Personal Automobile Use form developed by the Business Office, date, destination traveled from, and destination traveled to, with documentation attached supporting the distance between locations. Mileage reimbursement requests must be filed if possible within 10 business days of return to the District, and in no case later than 30 calendar days after return to the District.

### 4. Other Modes/Costs of Transportation

- i. When necessary and pre-approved, employees will be reimbursed for the costs of other modes of transportation, as well as for the costs of necessary tolls and parking fees.
- ii. The employee must provide, for reimbursement, an original receipt and, as applicable, a paid credit card statement if possible within 10 business days of return to the District, and in no case later than 30 calendar days after return to the District.  
Receipts for all tolls and garage/lot parking fees must be included.

### E. Specific Procedures for Expenses Related to Meals

~~Receipts for all meals must always be provided. If the meal cost is for more than one person, names of (the) other guests and the purpose for the reimbursable meal must also be included on the restaurant's bill. For conferences requiring an overnight stay reasonable daily meal expenditures of up to \$40 will be allowed for single person charges. Meals for single day conferences are limited to \$20 per staff member.~~

1. When pre-approved, employees will be reimbursed for the costs of meals, as well as for the costs of gratuities not to exceed 15%. The total cost of meal reimbursement for a single-day conference will not exceed \$20 per day, and the total cost of meal reimbursement for a multiple-day conference will not exceed \$40 per day. No cost related to alcohol will be reimbursed.
2. The employee must provide, for reimbursement, an original receipt and paid credit card statement if possible within 10 business days of return to the District, and in no case later than 30 calendar days after return to the District.

### F. Specific Procedures for Expenses Related to Lodging

~~Motel/hotel selected should be those that are well established, reasonable in price, and conveniently located in relation to the staff member's conference activity. Rooms should be at single rate. Luxury hotels are to be avoided. Original documentation for daily (or weekly) hotel charges must be included.~~

1. When necessary and pre-approved, overnight accommodations must be selected by the employee based on the most competitive rates available for the employee's planned travel.
2. Purchase of accommodations must be done by staff in the Business Office or the Office of the Assistant Superintendent, except in emergency circumstances, in which

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case the Business Manager will advise the employee of the procedures to follow for purchase and documentation.

### II. Expenses Associated with General Mileage Reimbursement

~~Staff members shall be reimbursed for the use of their automobile at the rate set by the Internal Revenue Service for business mileage deductions.~~

~~Mileage reimbursement requests must always indicate destination traveled to (and from) as well as the date of travel. Mileage reimbursement requests should be filed monthly.~~

#### A. Employees will be reimbursed for mileage incurred through use of their personal automobile at the rate set by the Internal Revenue Service for work-related travel under the following circumstances:

1. Travel, on a regular workday, from the employee's regular worksite to another worksite as part of the employee's regular schedule.
2. Travel, on a regular workday, from the employee's regular worksite to another worksite, and back if necessary, as required or pre-approved by the Superintendent, the Assistant Superintendent, or the employee's direct supervisor.
3. Travel, on a non-workday, from the employee's home to a worksite, and back, as required or pre-approved by the Superintendent, the Assistant Superintendent, or their designee.

#### B. Requests for mileage reimbursement must indicate, using the Itinerant Travel form developed by the Business Office, date, destination traveled from, and destination traveled to, with documentation attached supporting the distance between locations. General mileage reimbursement requests must be filed if possible within 10 business days of the end of each month.

##### ~~A. Included~~

- ~~1. Required attendance at meetings called by the Superintendent or other designated administrator.~~
- ~~2. Attendance at evening, non-school day or out-of-town pupil activities. (Number of staff members required to attend to be determined by the Principal in conjunction with the Superintendent or other designated administrator.)~~
- ~~3. Interschool or special school connected travel if necessary to perform duties. (Number of staff members required to attend to be determined by the Principal in conjunction with the Superintendent or other designated administrator.)~~
- ~~4. Institutional membership activities (i.e. CAS, NEASSC) or professional association activities (i.e. ESPAC, NASSP) approved in advance by the Superintendent or other designated administrator.~~
- ~~5. Attendance at Board of Education meeting determined by the Principal, Superintendent or other designated administrator.~~
- ~~6. Any other reason approved in advance by the appropriate member of the office of the Superintendent.~~

##### ~~B. Excluded~~

- ~~1. P.T.A., P.T.S.A., and P.T.A. Council meetings and related activities.~~
- ~~2. Board of Finance, Town Council or other meetings called by a town agency unless attendance is requested.~~
- ~~3. Any meeting or activity (not directly connected with the staff member's role) attended voluntarily or without the advance approval of the appropriate member of the office of the Superintendent.~~

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APPENDIX A

TRUMBULL PUBLIC SCHOOLS  
TRUMBULL, CONNECTICUT

Request for Authorization to Attend  
Conferences or Workshops

Name \_\_\_\_\_

School / Office \_\_\_\_\_ Date of Request \_\_\_\_\_

Date of Activity \_\_\_\_\_ Destination \_\_\_\_\_

Title / Description of Activity \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Goal to be Addressed:

\_\_\_\_\_ District \_\_\_\_\_ Building \_\_\_\_\_ Program \_\_\_\_\_ Individual

Description of Goal \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

How will the activity enhance your knowledge, skills, and professional competence?

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

How do you plan to share the information from the activity with your administrator, school colleagues, and/or district colleagues?

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

NOTE: Requests are to be submitted to the principal or supervisor, then forwarded to Director of Curriculum at least one week prior to the date of the activity.

Over



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Revised: 5/00

<u>COSTS:</u>	<u>AMOUNT</u>	<u>CHARGE TO*</u>
Registration	_____	_____
Transportation	_____	_____
Meals	_____	_____
Other (Please Specify)	_____	_____
TOTAL	_____	_____

**\* Charge to:** Indicate that the cost will be charged to Building Funds, Individual Staff Member, and/or District Wide Staff development Funds. Include account number to be charged.

Is substitute coverage required? \_\_\_\_\_ Yes \_\_\_\_\_ No

(If Yes, the teacher is responsible for calling the substitute line and requesting coverage.)

Approved _____	Denied _____	Principal/Supervisor _____
Approved _____	Denied _____	Staff Development ** _____
Approved _____	Denied _____	Director of Curriculum _____
Reason for Denial or Special Conditions Imposed _____		
_____		

\*\* Requests for reimbursement from District Wide Staff Development Funds must be signed by the Associate for Staff Development.

**Reminder:** If the conference/workshop is not a CEU provider, the teacher must complete the equivalent CEU request form (blue) before attending the activity. The verification form (pink) must be completed after the activity.

Revised: 5/00