

PERSONNEL

Section 13 Travel Policy

- A. ESU #13 seeks to ensure efficiency and promote fiscal accountability for ESU #13 travel expenditures. It is expected that ESU #13 Board members, employees and volunteers will apply this policy in a manner that strives to keep expenses to a minimum and assigns the costs of business related travel appropriately.
- B. It shall be the policy of ESU #13 to permit and to authorize Board members, employees, and volunteers of ESU #13 to incur certain expenses authorized by law for travel to and from attendance at educational workshops, conferences, training programs, official functions, hearings, or meetings. This policy shall not pertain to employees incurring mileage or other travel expenses during the regular course and scope of employment.
- C. Travel expenditures shall be authorized by the Board provided the following conditions have been met:

- 1. Board Travel

The Board of ESU #13 will be invited to attend relevant educational workshops, conferences, training programs, official functions, hearings, or meetings. After administrator approval, transportation and lodging arrangements will be made through ESU #13. If a personal vehicle is used, mileage will be paid. If an ESU #13 credit card is not provided, meals and incidental expenses will be reimbursed upon submitting receipts.

- 2. Employee and Volunteer Travel

- a. Employees of ESU #13 and volunteers performing services under the supervision and at the direction of ESU #13 shall submit a *Travel Request Form* to the administrator for approval to attend any of the following: educational workshops, conferences, training programs, official functions, hearings or meetings. The purpose for attending will be detailed along with an estimated cost for travel and attendance relating to the event. It is necessary to submit the *Travel Request Form* at least 30 days before the dates of the trip. A copy of the *Travel Request Form* will be returned to the attendee after the Administrator has approved the trip.
- b. Staff should use an ESU #13 credit card to make registration and advance hotel accommodations, when possible. These cards are available through the Administration office and can be used for pre-approved business expenses associated with ESU #13 travel. Then, an ESU #13 credit card can be signed out, with advanced approval of the Board and/or administrator, and used to pay for meals and other pre-approved expenses during the trip. The credit card should be returned to the Administration office within two business days following the return from travel.
- c. A travel envelope may be used to collect and store all related expenditure receipts. After the trip, the travel envelope should be attached to the signed and completed *Travel Request Form* and these documents should be given to the ESU #13

Business Office. In addition, attach a copy of the conference brochure and/or the meeting agenda when submitting the travel documentation. A reimbursement check will be issued if out-of-pocket expenses are listed.

- d. Expenses for an individual who will not participate in or attend the event should not be charged with the ESU #13 credit card.
- e. All receipts must be itemized and imprinted with the name of the establishment.
- f. Purchases within the State of Nebraska are exempt from Nebraska sales, use and lodging tax.
- g. Any employee who incurs expenses that are inconsistent with this policy or otherwise not pre-approved by the administrator or Board will be required to reimburse ESU #13 for said expenses. If the administrator determines that an employee abused the use of the ESU #13 credit card, the administrator has the discretion to terminate said employee's employment.

D. Travel expenditure categories

1. Airfare

- a. Transportation connected with ESU #13 business travel should be purchased at the lowest reasonable coach/economy fare that meets business needs.
- b. First class airfare is not permitted to be purchased.
- c. Economy plus, seating upgrades, or pre-boarding options are not permitted to be purchased with ESU #13 resources.

2. Personal Vehicle

- a. Use of a personal vehicle is permitted, with approval, or if there is no ESU #13 vehicle available.
- b. Reimbursement for use of a personal vehicle is based on the IRS standard mileage rate.

3. Lodging

- a. ESU #13 has set up direct bill arrangements with many hotels in Nebraska. Overnight lodging in Nebraska should be arranged with one of these hotels. The direct bill method is required for hotel expenses in Nebraska. Government rates and/or most economical rates should be obtained whenever possible.
- b. This policy does not apply if the employee is attending a convention or meeting and there is a negotiated meeting rate at the host hotel.
- c. Receipts for lodging must accompany the *Travel Request Form*. If employees charge non-room incidentals to the lodging bill, detailed documentation must be provided.

4. Transportation

- a. Detailed documentation needs to accompany the receipt for parking fees, toll fees, taxi and other transportation services.

5. Meals

- a. No claims may be made for alcoholic beverages.
- b. Meals cannot be claimed if they are provided as part of the workshop, training, or meeting.
- c. Accounting for Meals, Lodging and Other Travel Expenses

1) One Day Travel

Breakfast – Breakfast on the day of the trip can be claimed only if departure is at or before 6:30 AM.

Lunch – Lunch can be claimed if it is “on your own” and you are required to be at the event, and the event is not located in the community where you reside or the community of your normal work assignment.

Supper – Dinner on a one day trip can be claimed only if return is at or after 7:00 PM.

2) Meals for a trip with an overnight stay:

Breakfast – Breakfast can be claimed only if departure is at or before 6:30 AM or following an overnight stay.

Lunch – Lunch can be claimed if:

- a) on day of departure if at or before 11:00 AM
- b) on day of return if at or after 2:00 PM
- c) on other full days with overnight stay

Supper – Supper can be claimed only if return is at or after 7:00 PM.

Employees are responsible for reasonableness of all meal charges. Meal receipts must include a detailed breakdown of charges and must be submitted as part of the *Travel Request*.

Legal Reference:	
Date of Adoption:	May 19, 2020
Updated:	October 13, 2020 December 14, 2021

EDUCATIONAL SERVICE UNIT #13 TRAVEL REQUEST

INSTRUCTIONS:

- Fill out Travel Request form and have the Department Director sign.
- Give signed form to Executive Assistant who will return a copy to attendee after Administrator signs. (Please submit the request at least one (1) month prior to travel.)
- Use travel envelope to collect and store all related expenditure receipts. After the trip, attach envelope to the signed and completed travel form, and give the travel documents to the Business Office.
- A reimbursement check will be issued if approved out-of-pocket expenses are listed.

Name(s): _____

of attendees _____

Department: _____

Admin
 Alt Ed
 Psych & Behavioral Health
 Early Childhood
 Head Start
 Title I, Part C
 Prof. Learning
 Special Services
 Tech

<u>DATE</u> <i>of travel and event</i> <i>mm/dd/yy</i>	<u>EVENT/ACTIVITY</u> <i>Please do not use acronyms</i>	<u>LOCATION</u> <i>City, State</i>	<u>TRAINING CONTACT HOURS</u>

Motel room(s) needed for _____ nights on these dates _____

Motel Location or Name _____

Transportation:
 ESU Vehicle
 Personal Vehicle
 Commercial Travel
 Other

ESTIMATED EXPENSES:

Registration	Transportation	Lodging	Meals	Other	TOTAL
\$	\$	\$	\$	\$	\$

Employee Signature _____

Date _____

PERMISSION TO TRAVEL:

Bill expenses to project/department code # _____

Director Signature: _____ Date _____

Administrator Signature: _____ Date _____