



## SECTION V: BUSINESS AND TECHNOLOGY POLICY 5070

---

### Travel Policy

#### Scope of Policy

This policy applies to all teachers, counselors, and others who work in a similar capacity in the service of students attending Insight School of Oklahoma (ISOK) and Board members who incur expenses as a result of school related travel.

#### Policy Introduction/Responsibility of Traveler

The Executive Director and Operations Manager are authorized to establish procedures and administrative regulations for travel and reimbursement of expenses in accordance with federal and state law and board policy. Only expenses directly related to the approved activity or meeting may be claimed for reimbursement. Oklahoma state law does not allow the district to advance funds for travel expenses.

Business travel expenses will be reimbursed by ISOK if expenses are:

- a) reasonable,
- b) appropriately documented,
- c) properly authorized,
- d) submitted within thirty (30) days of when the expense is incurred and
- e) within the guidelines of this policy.

In addition to the specific transportation, lodging, and car rental guidelines set forth in this policy, ISOK provides travelers with other spending guidelines. Failure to comply with this policy may result in the denial of a reimbursement request.

This policy will be administered in compliance with the requirements of the Americans with Disabilities Act (ADA). Should a travel accommodation be required, travelers are encouraged to work with the travel agent and the Executive Director to identify the necessary accommodations.

#### Approval for Travel

Traveler must receive prior approval before incurring any travel related expenses. The manager/ Executive Director shall approve the travel and the encumbrance clerk shall issue a purchase order upon approval of the travel request. Any travel expenses incurred prior to the date of the purchase order shall not be eligible for reimbursement.

#### General Travel Procedures

All travel must be pre-approved. The approval process is outlined in the Operations manual.

Original itemized receipts or other evidence of payment are required for all reimbursements for expenses. Appropriate documentation shall include a signed expense report form which itemizes the expenses incurred. Expense Reports must be submitted to the encumbrance clerk within thirty (30) days of completion of authorized travel. Claims that were not pre-approved, are not submitted within thirty (30) days or do not contain the proper documentation will not be reimbursed.

If the conference, hotel or airline does not accept a school purchase order, the traveler must work with the encumbrance clerk/supervisor to pay with the PCard.

An agenda or itinerary must be submitted with the expense report when attending an out-of-district conference or professional development activity.

*For in state travel:*

The individual is responsible for working with the encumbrance clerk and/or supervisor for all travel arrangements and reservations.

*For out of state travel:*

*Refer to Stride Employee Handbook for current company policies and/or consult with Executive Director for actions needed to complete before travel.*

### Meals

A per diem rate, or actual costs, whichever is less, will be given at the current per diem Federal CONUS Rate to cover meal expenses incurred during travel that is outside of normal, daily operation and approved by supervisor such as an overnight stay if an individual attends a work-related activity (school sponsored business trip, professional development, outing or other staff meeting).

If a meal is served as part of the activity, per diem for that meal will not also be paid. Meals may be provided at district hosted in person professional development. If a meal is not provided, you will be reimbursed up to the per diem Federal CONUS Rate, based on itemized restaurant receipt, not from a credit card bill or other receipt. Snacks, beverages or any other treats purchased throughout the day or during travel will not be reimbursed.

A per diem rate will be given at the current per diem Federal CONUS Rate for any out of state travel.

### Hotel Accommodations

Hotel accommodations for in-state travel may be approved if the business event is two or more consecutive days and hotel charges for consecutive nights is less than mileage reimbursement for the traveler to travel to and from the event each day. Unless prior approval is received from the Executive Director, travelers will be reimbursed for one night less than the total number of days required to perform the job. Consideration for start/end times for event will be considered when granting overnight stays that exceed the guideline.

Upon Executive Director approval, the encumbrance clerk shall book hotel reservations for staff.

Source: ISOK Board Policy adoption 2/10/2015

Revised 11/17/2016

Revised 9/15/2022

Revised 5/18/2023

Economy priced hotels (\$100 or less per night) should be used. The cost of the hotel may not exceed \$125 per night. The Executive Director has authority to approve hotels at up to two times this rate, if deemed necessary and unavoidable.

For out of state travel, the traveler will work with the encumbrance clerk and supervisor to make travel arrangements.

It is the traveler's responsibility to notify the hotel to cancel a room reservation prior to the cancellation time. Most hotels require a cancellation before 6 p.m. of the first night of the reservation. Peak times or hotels in major cities require 24 - 72 hours cancellation period. Travelers should remember the cancellation deadlines are based on local time of the destination hotel. Timely cancellation will avoid no-show charges as all hotel reservations are guaranteed. If the reservation is not canceled, a no-show charge will be assessed and billed to the traveler's credit card. Reimbursement of no-show charges must have the same approvals as the initial travel request. The Executive Director/manager has the discretion not to approve reimbursement requests for no-show charges.

When traveling to a conference, it is appropriate to stay at one of the hotels hosting the conference even if the rate exceeds the guidelines. Travelers are not required to make reservations for blocked conference hotels through the travel agent. However, the room booked must be covered by the conference rates and should not be in excess of need. Documentation stating the conference rate must accompany the original receipts when submitting for reimbursement.

Consideration should be given to staying at a more reasonably priced hotel if conference hotel rates are high.

The school will pay for the cost of the hotel room only. Items billed to the hotel room such as meals, movies, incidentals, etc will be the traveler's responsibility and will not be reimbursed.

### Airline Travel

Travelers will work with supervisors and encumbrance clerk for booking airline tickets using the PCard. In the event the traveler books their own flight and submits for reimbursement, travelers must use the lowest non-refundable fare coach class tickets for domestic and international flights. It is the employee's responsibility to verify exceptions with the Executive Director.

If the traveler chooses a business or first class airfare on a flight, he/she must absorb the additional cost and the rate differential must be clearly documented for reimbursement purposes. Only the coach class rate will be reimbursed unless pre-approved by the Executive Director.

Reservations should be made as early as possible to receive the maximum advance purchase discounts. Travel should be booked in advance whenever possible to achieve lower fares. Travelers are strongly encouraged to consider booking the lowest priced flight within two hours of desired departure and/or arrival times. Travelers are also encouraged to consider alternative airports and/or connecting flights to obtain lower fares.

Electronic tickets (E-Tickets) must be used for all domestic travel unless the electronic ticketing service is not available. Electronic ticketing is more cost effective due to multiple airlines charging additional fees for paper tickets.

Source: ISOK Board Policy adoption 2/10/2015

Revised 11/17/2016

Revised 9/15/2022

Revised 5/18/2023

To reduce overall cost, travelers are required to travel on non-refundable penalty fare tickets whenever their travel schedule permits. Non-refundable tickets are generally less expensive and are reusable. While these tickets are non-transferable, they are re-useable for one year and can be applied to the traveler's next trip as long as he or she flies on the same airline. The airlines typically assess a conversion fee when using these tickets, but the conversion fee is almost always lower than the difference between a refundable and a non-refundable ticket.

If, for any reason, an airline ticket is not going to be used, you must contact your supervisor and/or encumbrance clerk to cancel and reschedule the flight prior to the original departure date. Airlines have recently implemented a new policy for non-refundable tickets requiring that any changes must be made on or before the departure date of each ticketed segment.

Unless the reservation is cancelled, it will not be reimbursed without Executive Director approval.

In rare instances in which an airline does not provide electronic tickets and the traveler loses the paper ticket, immediately report the lost or stolen ticket to the travel agent. The traveler will need to complete a Lost Ticket Application that will be filed with the appropriate airline. The Lost Ticket Application can be picked up at the specific airline counter or by requesting an application from the travel agent. A new ticket will be issued for the lost ticket portion at the cost of the original fare plus a lost ticket fee. The traveler will be responsible for the lost ticket fee. This fee will need to be deducted from the expenses reimbursement form. The average fee for lost tickets is \$100.

Travelers are permitted to join frequent flyer programs, and the benefits earned may be used by the traveler for personal use. Frequent flyer memberships should not influence travelers to select a flight that is not the lowest priced flight available. Staff may use personal frequent flyer miles to upgrade their ticket only if there is no additional cost to ISOK. The selection of circuitous routes on particular carriers to accrue frequent flyer credits is not allowed.

#### Other Transportation

Travelers may select the mode of transportation to meet their personal preference; however, the amount reimbursed to the traveler may not exceed the non-refundable coach airfare for the same trip. The traveler will be required to pay the difference between the price of the alternative mode of transportation and the equivalent coach fare if an alternate mode is higher. This difference should be deducted from the expense statement submitted for the trip. If the alternative travel choice is lower, ISOK will only reimburse actual expenses.

Travelers may use their personal car for business. Mileage, parking, and tolls will be reimbursed. Documentation is required. It is the responsibility of the owner of the vehicle to carry adequate insurance coverage for their protection, including personal effects, and the protection of any business passenger(s).

Employees are eligible for mileage reimbursement for school sponsored business trips in excess of 20 miles round trip. This includes lead teachers.

Source: ISOK Board Policy adoption 2/10/2015

Revised 11/17/2016

Revised 9/15/2022

Revised 5/18/2023

Travelers will be reimbursed for business usage on personal cars at the Federal Government's prevailing rate per mile. Reimbursement for mileage to return home rather than stay at a hotel for trips that qualify for hotel stays may not exceed the average hotel cost. Travelers will not be reimbursed for any of the following, even if these costs were incurred during business travel.

- a) Car repairs,
- b) Tickets, fines, or traffic violations
- c) Damage to personal vehicles
- d) Theft of personal vehicle or vehicle content

The most economical mode of transportation should be used to and from air, bus, and rail terminals. Many major hotels provide transportation to and from airports free of charge. Public transportation and shuttle services should be considered. Staff traveling to the same location should share ground transportation whenever possible. When carpooling, only the traveler that drove and incurred the expense shall submit an expense report for reimbursement of mileage.

When tolls are incurred, the traveler must submit proper documentation with their expense report. This would be either a PikePass statement (personal information can be redacted), the original receipt, or a plate pay statement showing proof of payment. If none of the above are available, only then should the traveler include a screenshot of the turnpike calculator.

Original receipts are required for reimbursement of taxi, ride sharing (such as Uber or Lyft), shuttle, bus, or other ground transportation.

### Car Rental Procedures

Travelers may rent a car at their discretion or for local travel when it is the least expensive mode of transportation and meets the minimum standards of safety and time efficiency. In large cities, high rental and parking rates generally make vehicle rental impractical. Alternative modes of transportation such as taxis, subways, and airport or hotel shuttles should be given first consideration.

When a car rental is appropriate, all staff are encouraged to use the travel agent to book rental cars for business-related travel; our preferred vendors are Avis and Hertz.

Travelers are to pay for charges with their personal credit card. Every reasonable effort should be made to return the rental car with a full tank of gas to avoid expensive refueling charges. The fuel purchase option (FPO) offered at time of rental should be accepted if there is a concern about personal safety at refueling locations.

Travelers are permitted to rent compact to mid-sized cars for individual travel or full-sized for group travel. Larger car rental is only permitted if approved in advance by the Executive Director or his/her designee. Larger cars and utility vehicles are allowed for group travel if that will avoid the rental of multiple smaller vehicles.

When signing a rental agreement, be sure to decline all insurance, including collision damage waiver and personal accident coverage. K12 has an insurance coverage with Hired Auto which covers liability and physical damage. In the event of an accident resulting in damage to the rental car, notify the rental car company and the Purchasing Department, and submit a written report including back-up documentation (police report, if applicable) to the Purchasing Department as soon as possible.

Consultants / contractors are not covered under K12 insurance.

Proof of payment is required for rental car reimbursement.

### Other Travel Expenses

Conference registration should be paid in advance. The use of purchase orders should be the first form of payment. The purchase order must be in place before registration. The invoice should be sent to the encumbrance clerk for payment. In the event that the conference doesn't accept purchase orders, the traveler must receive pre-approval for reimbursement. At that time, the registration invoice and record of payment is required with the expense report form submitted to the encumbrance clerk for reimbursement. The cost of excursion/entertainment offered at an additional fee as part of a conference is considered a personal expense and is not reimbursable.

Long distance telephone charges in excess of \$10 per day billed by the hotel will not be reimbursed.

Airphones should be used only in case of an emergency.

Travelers are strongly encouraged to use satellite or long-term parking lots.

Travelers will be reimbursed for reasonable gratuities. Tips for taxis are allowable expenses at the normal (15% to 20%) rate.

Reimbursement will not be made for personal entertainment, alcoholic beverages, or non-business phone calls.

Waivers for any of these policies can be made only by the Executive Director.