

PERSONNEL

GENERAL PERSONNEL - EXPENSES

The Board regulates the reimbursement of all travel, meal, and lodging expenses by resolution. Money shall not be advanced or reimbursed, or purchase orders issued for: (1) the expenses of any person except the employee, (2) anyone's personal expenses, or (3) entertainment expenses. Entertainment includes, but is not limited to, shows, amusements, theaters, circuses, sporting events, or any other place of public or private entertainment or amusement, unless the entertainment is ancillary to the purpose of the program or event. Employees must submit the appropriate itemized, signed, standardized form(s) to support any requests for expense advancements, reimbursements, or purchase orders that show the following:

1. The amount of the estimated or actual expense, with attached receipts for actual incurred expenses.
2. The name and title of the employee who is requesting the expense advancement or reimbursement. Receipts from group functions must include the names, offices, and job titles of all participating Board members and employees of the District.
3. The date(s) of the official business on which the expense advancement, reimbursement, or purchase order will be or was expended.
4. The nature of the official business conducted when the expense advancement, reimbursement, or purchase order will be or was expended.

Advancement of Expenses for Attendance at Conferences, Seminars and Conventions (Licensed Employees)

The Board may advance to teachers and other licensed District employees, anticipated actual and necessary expenses for travel and other purposes relating to attendance at conferences, seminars, conventions and other meetings which are related to the employee's duties and which will contribute to the professional development of the employee, in accordance with this policy and the Board's expense regulations.

Actual and necessary expenses are those reasonably anticipated to be incurred on the days necessary for travel to and from and for attendance at such meetings.

No advance payment shall be made except for specific reservations for travel, advance registration, and lodging. The check for advance payments shall be written directly to the agency by the District's treasurer.

All expense vouchers must be signed by the employee's supervisor and reviewed for correctness and approval by the Business Manager before they will be submitted to the Board.

Expense advancements and vouchers shall be presented to the Board as part of its regular bill review process.

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If the employee's actual and necessary expenses, as approved by the Board, exceed the amount advanced, the employee shall be reimbursed. If actual and necessary expenses, as approved by the Board, are less than the amount advanced, the employee shall refund the excess amount to the District within ten (10) days of Board approval.

Reimbursements and Purchase Orders

Expense reimbursements and purchase orders may be issued by the Superintendent or designee to employees, along with other expenses necessary for the performance of their duties, provided the expenses fall below the maximum allowed in the Board's expense regulations.

Expense reimbursements and purchase order approvals are not guaranteed and, when possible, employees should seek pre-approval of expenses by providing an estimation of expenses on the District's standardized, electronic, estimated expense approval form for employees, except in situations when the expense is diminutive. When pre-approval is not sought, employees must seek reimbursement on the District's standardized expense reimbursement form for employees.

Use of Credit and Procurement Cards

Credit and procurement card usage is governed by Policy 415.07 *Use of Credit and Procurement Cards*.

Exceeding the Maximum Allowable Expense Amount(s)

With regard to travel, meal, and lodging expenses, all requests for expense advancements, reimbursements, and purchase orders exceeding the maximum allowed in the Board's expense regulations may only be approved when:

1. An emergency or other extraordinary circumstances exists; and
2. The request is approved by a roll call vote at an open Board meeting.

Actual and necessary travel and other expenses incurred by District employees while on approved District business will be reimbursed, as follows:

Registration

When possible, registration fees shall be paid by the District in advance.

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Travel or Mileage

The least expensive transportation shall be used, providing that no hardship shall be caused to the District employee. District employees will be reimbursed for:

1. Air Travel

District employees shall be reimbursed for air travel at the coach or single class commercial airline rate. First class air travel shall be reimbursed only if emergency circumstances warrant such travel. The emergency circumstances must be explained on the expense vouchers. Copies of airline tickets shall be attached to the expense vouchers to substantiate amounts.

2. Rail, Bus Travel

District employees shall be reimbursed for rail or bus travel at actual cost. Rail or bus travel costs may not exceed the cost of coach air fare. Copies of tickets shall be attached to the expense vouchers to substantiate amounts.

3. Automobile Travel

District employees shall be reimbursed for use of personal automobiles at the standard mileage rate approved by the Internal Revenue Service for income tax purposes. The reimbursement may not exceed the cost of coach air fare.

4. Rental Automobiles

District employees shall be reimbursed for automobile rental costs when the vehicle's use is warranted. The circumstances for such use must be explained on the expense vouchers.

Miscellaneous Travel

Mileage for use of personal automobiles in trips to and from transportation terminals shall be reimbursed to District employees at mileage rates approved by the Internal Revenue Service. Toll charges and parking costs shall be reimbursed in full. District employees also shall be reimbursed in full for taxis, airport limousines or other local transportation costs.

Up to Two Hundred Fifty Dollars (\$250.00), considered the deductible portion of the employee's automobile insurance, shall be reimbursed when a District employee is involved in an accident while on school business that has been directed by the employee's immediate supervisor or the Superintendent. This allowance will be paid only when the expense vouchers are accompanied by adequate proof that a deductible expense was incurred, that the vehicular accident was not caused by the employee, and that the surrounding circumstances suggest that the other vehicle involved should not bear the cost of repair.

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Hotel/Motel Charges

1. Room Charges

District employees shall request conference rate or mid-fare room accommodations when possible. A single room rate shall be reimbursed.

2. Hotel/Motel

Other expenses incurred by District employees shall be reimbursed when specifically related to School District business. The expense vouchers or hotel bill must explain the types of expenses incurred.

District employees shall pay personal expenses that are charged to hotel room bills at check-out. If impossible, deductions for the charges should be made on the expense vouchers.

Meal Charges

Meal charges to the School District should represent "mid-fare" selections for the hotel/meeting facility or general area. Tips shall be included with the meal charges. Expense vouchers must explain the meal charges incurred. Alcoholic beverages will not be reimbursed.

Miscellaneous Expenses

District employees may use the standardized expense form to request reimbursement for other expenses related to School District activities.

Personal Charges

All personal travel costs, including travel to and from the employee's job location and all voluntary travel to and from meetings, shall be excluded from expense vouchers.

All travel or other expense related activity outside the School District shall require prior approval of the Superintendent.

All travel or other expense related activity within the School District shall require the approval of the employee's supervisor or the Superintendent.

No District employee shall be reimbursed for any expense incurred by or on behalf of any person other than such employee.

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LEGAL REF.: 105 ILCS 5/10-22.32
 Local Government Travel Expense Control Act, 50 ILCS 150/.

Adopted: March 10, 1983
Revised: June 23, 1988
Revised: March 12, 1998
Revised: June 23, 2003
Revised: February 23, 2017