

## **CSRM - JPA Conference and Travel Reimbursement Guidelines - Revised**

Members of the Board of Directors shall be authorized to attend conferences/events pre-approved by the California Schools JPA for which the JPA shall provide reimbursement to the member district up to two thousand dollars (\$2000.00) for members in two programs or one thousand dollars (\$1000.00) for members in a single program per fiscal year. Board Members wishing to attend such functions pursuant to this policy shall notify the JPA in advance to verify funds available.

Reimbursement shall be actual and necessary expenses incurred for attending said event and fall under the policies of the JPA Administrative Agent.

Board Members may use the allotted funds on a single event or spread out to cover costs of various conferences throughout the fiscal year. When funds have been exhausted, the member district will be responsible for any costs beyond the allocated amount.

Members of the Executive Committee may attend two conferences each fiscal year that meet the requirements of their program participation (CAJPA, PARMA, CASBO, or other equivalent). The JPA will cover full costs for two conferences, make all arrangements for registration, accommodations, and travel (when necessary, based on the location of the conference). Members of the Executive Committee will be reimbursed for out-of-pocket expenses, following the Administrative Agent travel authorization/reimbursement policy.

### **Submission of Reimbursement Claims:**

All Board Members must have an **Authorization to Pay Non-Employee Expenses Form** on file with the JPA office before reimbursements can be requested.

Reimbursement to the Board Member: A CSRM Board Member Reimbursement Form will accompany any supporting documents and submit to the JPA Administrative Services Assistant at JPA office for processing.

Reimbursements to the District/Community College: A Conference and Travel Reimbursement Form will accompany any supporting documents, signed by the CBO/CFO and submitted to the JPA Administrative Services Assistant at JPA office for processing.

Expenses paid by the member district will be reimbursed directly to the member district.

Board Members cannot claim direct reimbursement if they are reimbursed for the same expenses by their member district or other entity.

*Revision Approved by the CSRM Board of Directors – April 24, 2019*

## **Definitions**

### **Documentation of Expenditures**

The following are required to be submitted to document proof of all authorized travel expenditures:

- All expenditures to be included in reimbursement requests by either member districts or individual Board members:
  - Proof of paid conference registration fees (receipt)
    - Copy of conference/event agenda or program
  - airline fees listing attendee name, dates, and trip destination
  - hotel check-out folios listing attendee name and dates of stay
  - parking fees, taxi/ridesharing or rental car receipts showing the date(s) of service
- Meal Reimbursement Rate: Limited to \$86.00 per day per individual for a single meal or total daily meals.
  - Gratuity is limited to 20% pretax amount.
  - Original itemized meal receipts (must show what was ordered), copies are not accepted.
- Mileage: Google Maps or other site that shows the shortest distance between start of the trip and destination, (home/destination/home **OR** workplace/destination/workplace).
  - Work commute miles will be deducted if the shortest distance was not used.
- Toll roads: receipt showing the date/time and total cost of the toll.

Other forms of documentation may be required depending on the unique nature of the expenditure.

### **Reimbursement will normally be limited to:**

- Conference/Event Registration fees
- Actual costs of coach airfare
- Transportation (i.e., taxi, ridesharing) – airport/hotel/airport or hotel/conference/hotel; during the trip, as appropriate
- Hotel accommodations – single rate only
- Meals – when not otherwise included or offered as part of the conference/event
  - If meals are offered but attendee chooses not to eat meals offered as part of the conference/event, meals will not be reimbursed.

**Special Note:** The California Schools JPA staff in support of its Board members will provide assistance in making travel arrangement and covering conference costs on behalf of the members when the resources are unavailable or accessible to the Board member.