

Lewis Center for Educational Research

AR 3350 (a) BUSINESS - NON-INSTRUCTIONAL OPERATIONS TRAVEL REIMBURSEMENT

Adopted: September 10, 2007

Revised: April 8, 2024

Travel Reimbursement

The Lewis Center for Educational Research (LCER) will pay authorized travel and business expenses of employees. Travel expenses, including airfare, may be paid for non-employees representing LCER on official business. All travel expenses for non-employees must be approved, in advance, by the President/CEO of LCER.

Expenses will be reimbursed based on actual, necessary and reasonable expenses. Mileage reimbursement will be in an amount equal to the reimbursement rate established by LCER and any change in the reimbursement rate will coincide with the verified and approved rate by the IRS.

Actual and Necessary Expenses for Meals and Lodging

All travel claims will be paid on an actual and necessary basis.

Meal reimbursement up to \$66 per day including tax and tip.

Authorized for the following purposes:

Meals

- Breakfast – if travel assignment begins more than one (1) hour prior to the start of the employee's normal workday.
- Lunch – if travel assignment begins before 11:00 and/or ends after 2:00..
- Dinner – if travel assignment extends more than two hours beyond the end of the employee's regular workday..
- **Itemized receipts, credit card or hotel receipts are required as documentation of expense to be reimbursed.** Restaurant check stubs are not acceptable for meeting the receipt requirement. A maximum acceptable tip is 20%. Alcoholic beverages will not be reimbursed.

Non-Employee Reimbursement

- Non-employees acting as representatives of LCER may also claim meal expenses following the same criteria listed above. Only the President/CEO is authorized to designate a non-employee to act as a representative of LCER.

Other Receipt Requirements

When claiming actual and necessary expenses, itemized receipts are required. Only the single room rate can be claimed by an employee. If the room is shared with another LCER employee, each employee may claim half of the double rate or either employee may claim the full double rate with a written acknowledgement from the other.

Registration fees require a receipt. The registration form and/or brochure are also required when fees exceed \$50 to verify what is included in the fee. If a registration form or brochure is not available, a statement on the expense claim is acceptable indicating if the fee is for registration only or if it includes meals. Receipts must be submitted for parking for each occurrence. Receipts for car rental charges are required.

Non-Reimbursable Expenses

Non-reimbursable expenses shall include, but are not be limited to, non-business related travel, registration or tuition fees for which units of credit are given, snack items, internet charges, movies, any other charges for activities which are non-business related and non-business related phone calls. Personal out- of-state and international calls will not be reimbursed. When making business related calls other than to the office of the LCER, a record of the calls shall be kept which includes the name of the person called, their place of business and the nature of the call.

Employees will not be paid for mileage from home to the base of the operation and the subsequent trip home. This mileage will be subtracted from the total mileage driven on any given day. Exceptions may be made if approved by President/CEO of LCER.

It is encouraged that expense claims be turned in within 30 days of return from conference.

Travel Advance

Travel advances may be issued unless the traveling employee has been assigned an organizational credit card. When a travel advance is approved, it shall be issued for 100% of the “out of pocket expenses” requested based upon the calculation from conference back-up (flyers, etc). Travel advance requests shall be submitted three weeks prior to the travel advance being issued whenever possible. An employee may have only one advance outstanding at any given time unless special consideration is given due to the nature and timing of travel. This special consideration must be approved by the President/CEO. Travel advances are NOT transferable.

Mileage Expenses

It is preferred that an employee or groups of employees carpool. If a group is carpooling and an employee chooses not to travel with the group for personal reasons, only the vehicle used for carpooling will be reimbursed for mileage. Employees who use their personal vehicle for business travel must have documented proof of liability insurance and a valid California driver’s license. Mileage reimbursement will be in the amount equal to the reimbursement rate established by LCER and any change in the reimbursement rate will coincide with the fluctuations in market fuel prices. The allowable distances to be charged for destinations need to be supported by a Mapquest or like document showing mileage to destination.

If an employee is required to attend a meeting or activity on a non-work day or after regular work hours, he/she shall be reimbursed for mileage from home or the regular work site to the meeting/activity site, whichever is closer.

If an employee makes business-related stops on their way to work or on their way home, only that portion of mileage in excess of their regular home/work mileage is reimbursable.

Itinerant employees will only be reimbursed for mileage accrued beginning at their first work location through their last work location each day. They will not receive mileage reimbursement from home to their first work site or from their last work site back home.

When an employee requests to use his/her vehicle as a means of travel to an established destination in lieu of airfare and the request is approved by the supervisor, the reimbursement will be the lesser of:

1. The actual mileage times the LCER rate per mile, or
2. The air fare, ground transportation and parking.

Travel times to the destination will be that time necessary to travel from the office to the destination by air; however, it must be no more than one day in length. Travel time in excess of one day will be treated as vacation. Workers’ Compensation laws do not apply to vacation time.

After flying to a destination, choice of ground transportation (public or private shuttle or rental vehicle) shall be at the discretion of the supervisor or in the case of the organizational credit card, the designated approving official.

When two or more employees are traveling, the following are preferred methods of transportation:

1. Carpool in a personal vehicle.
2. Reserve and drive an organizational vehicle.
3. If multiple employees are traveling to the same destination, consider the total cost of travel for all (mileage vs. air fare, parking, etc.) when determining type of transportation to be used.

With supervisor approval on Employee Reimbursement Claim, parking and toll road costs will be reimbursed.

Personal Vacations and Traveling with a Companion

Employees will be reimbursed only for the legitimate costs of traveling on business of the Lewis Center for Educational Research. If an employee schedules personal vacation before or after the sanctioned business travel, or if the employee travels with a companion who is not an employee of this organization, the employee's expenses will be reimbursed only for the time during which the sanctioned business travel occurs and the following shall apply:

- The employee must obtain the prior written approval of his/her supervisor for vacation in conjunction with business travel or for travel with a non-employee companion.
- Meal costs shall be reimbursed only for the employee and only under the same standards included elsewhere in this procedure.
- Lodging will be reimbursed at the single room rate of hotel/motel at which the employee stays.
- Airfare costs will be reimbursed for the employee only and at the rate which this office would have paid if the employee traveled alone at the fare structure normally available to this office for a 14- day advance purchase round-trip flight to the destination at which the approved meeting/conference occurred.

Airline Travel Arrangements

All out-of-state and non-employee travel must be pre-approved by the President/CEO.

When possible, airline arrangements should be made well in advance so as to get best rates.

CAUTION: Non-refundable, non-changeable tickets are not always recommended; however, they are allowed. Non-airline websites offering travel tickets are generally limited to restricted ticket purchases and making future changes are difficult or unavailable. Credits pose a tracking problem for the client. LCER/AAE strongly urges that these sites not be used.

Flight Cancellations

Cardholders are responsible for tracking canceled flight reservations that have been credited for future use.

Car Rental Insurance

Rental car companies offer both comprehensive/collision coverages and liability insurance when renting a vehicle. It is appropriate to purchase these coverages and they will be reimbursed.

When necessary, travel authorization procedures may be clarified by the President/CEO or the Purchasing Agent.

Overnight Parameters

The following parameters should be considered when determining if/when employee overnight travel is in the best interest of the organization, including employee safety, or for the sole convenience of the employee. The CEO or

designee will make the decision and approval for a specified number of nights that will be approved prior to the commencement of the trip.

1. Driving: The beginning time of the event (meeting, conference, presentation, etc.) is such that the employee would be required to leave the routine duty station or home (whichever is closer) more than two hours prior to the employee's normal work shift or the event is more than 60 miles one way from the routine duty station or home (whichever is closer). Southern California traffic conditions should be taken into consideration but not used as sole justification.
2. Flying: The beginning time of the event is such that no available flights coupled with standard ground transportation would allow the employee to arrive more than 15 minutes after the start of the scheduled event.
3. In either instance, the employee's safety must always be a primary consideration. If any combination of event and travel time exceeds 10 hours, it is permissible for the employee to stay one night.

The organization will not reimburse lodging costs when it is determined that the only factor was employee convenience.