



## **ADMINISTRATIVE PROCEDURE**

CATEGORY: **Personnel, Leaves/Absences**

SUBJECT: **Absence on District Business**

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### **A. PURPOSE AND SCOPE**

1. To outline administrative procedures governing payment and reimbursement of travel-related expenses for employee attendance at district-related conferences and district-related travel out of the district, including professional development, without loss of salary and *with* or *without* expense reimbursement to the employee.
2. **Related Procedures:**
  - Lobbying ..... 0705
  - Professional Consultants, Resource Persons, and Student Service Providers ..... 1550
  - Employee Payment for Use of Personal Car ..... 2510
  - Payment of Expenses for Special Activities ..... 2518

### **B. LEGAL AND POLICY BASIS**

1. **Reference:** Board policy I-2300; California Education Code §44032.
2. **District educational goals and objectives.** Absence on district business must be directly related to and support current district educational goals and objectives, as determined by the employee's site principal/administrator or department head. Attendance at out-of-district meetings and conferences by district employees may be beneficial to the district; however, travel by employees that involves time away from the job and often additional expense to the district may be incurred. In all cases, the value of travel must be weighed carefully in terms of assignment, time lost and deferment of work, as well as actual expenses of the travel. Absences for purposes of travel and related expense claims are public records, and as such are subject to review and audit.
3. **Officers of non-district organizations.** District funds will not be used for travel or expenditures for attendance at business meetings and conferences by officers of non-district organizations.
4. **Dues and memberships.** Ordinarily, the district does not pay for an individual's membership to an organization, however, upon approval by the Chief Financial Officer (CFO), memberships may be authorized for professional development organizations when that membership directly benefits the district in a manner which enhances the academic and organizational goals of the district.

The district will not pay for membership dues when registration for a conference/workshop mandates membership in an organization in order to attend and does not offer a non-member rate that does not include the cost of the membership. In these cases, the employee is responsible for payment of the membership as a personal expense. However, if the total conference cost, including the membership cost, is less than the conference cost for non-members, the district may pay the individual membership dues upon approval of the CFO.

5. **Honorarium/compensation payments.** Whenever an employee receives an honorarium or is paid other compensation for services performed during his/her regular hours, the employee shall endorse payment over to the district.

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6. **Parents/guardians, student representatives, and/or community members.** In general, parents/guardians, student representatives, and/or community members must pay all of their own expenses. The district does not generally process prepayments for workshop/training activities (e.g., airfare, registration, hotel) for these individuals.

### C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Financial Services Division.
2. **Definitions.**
  - a. **District business:** Any duties or responsibilities that further the interests of the district and require an employee to be away from his/her normal place of duty.
  - b. **Professional development:** Activities that enhance an employee's skills, knowledge, and abilities to perform the job, such as conferences, workshops, seminars and/or professional meetings.
  - c. **Department-level approver:** The site principal/administrator for school site personnel; the employee's next level manager for all other personnel.
  - d. **Branch head approver:** A member of senior leadership, such as a division chief or executive director.
3. **Authorized absences.** All absences must be authorized in advance by the appropriate department-level and branch head approvers. An employee's supervisor must authorize all absences for travel and attendance at conferences. When authorizing an absence, consideration shall be given to requirements and limitations outlined in this procedure. All out-of-district travel authorization requests are to be approved by the employee's department-level approver; this includes travel by all staff, including site principals/administrators and department heads whose travel is to be approved by the branch head. Attendance at out-of-district meetings and conferences should occur as often as possible outside of the employee's prime assignment time.
  - a. **Absence with salary and *with* reimbursement of expenses.**
    - (1) Employee occupies a management or supervisory position with responsibility relating to request for travel;
    - (2) Employee has a special interest and qualifications relating to a field or subject and by attendance at the event is qualified to offer a significant contribution to the district upon return to duty;
    - (3) Employee is carrying out a specific assignment as approved by the Superintendent or his/her designee; or
    - (4) Conference or business travel is considered to be of such importance or value that the site principal/administrator or department head directs or recommends that the employee undertake such activity, subject to required approvals.

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b. **Absence with salary but *without* substitute or reimbursement of expenses.**

- (1) Absence is connected to a meeting or conference that the employee is attending at his/her own expense in order to improve personally as an employee or for improvement of his/her position, sufficient to justify loss of time on the job or deferment of other work, but with limited benefits to the district.
- (2) Attendance is requested at a meeting or conference of a national, state, or regional organization that has a purpose compatible with the educational goals of the district and with the professional development of the individual.
- (3) Attendance is requested at a meeting or convention of a recognized public service association and the employee has been designated by the district as an official delegate, with responsibility for significant contribution to the public service by virtue of such attendance or as an officer of the organization.

c. **Absences related to special project-funded programs and entitlements.** All requirements noted in this procedure apply to requests of employees in special project-funded programs except where project regulations/plan requires attendance at specific activities.

- (1) Planning/reviews. The project director or designee may travel for project planning and contract reviews required by project regulations, funding-agency directives, and district policies.
- (2) Implementation. The project director or designee may travel for project implementation meetings called by the funding agency or by the California or US Department of Education for the purpose of providing orientation on specific guidelines on procedures, if such meetings are required and funded by the project.
- (3) Conference or workshop attendance or participation. Workshops or leadership training activities must support district goals and must not be available locally. Participation by representatives of special project-funded programs must be included as an activity in school-level plan or district-level project application. Requests for attendance or participation will be reviewed and approved on a case-by-case basis by appropriate managers.

d. **Absences related to professional meetings.** Participation in such activities should be directly related to the professional growth of the individual employee and must be of benefit to the district as the employer. Because district travel and expense funds are extremely limited, site principals/administrators and department heads are expected to keep such travel to a minimum.

e. **Absences related to travel for workshop or leadership training activities requiring release time or expenditure reimbursement.** District staff and parents/guardians or community representatives may attend workshops or leadership training activities that support district goals and are not available locally. In general, parents/guardians, student representatives, and/or community members must pay all of their own expenses. The district does not generally process prepayments for workshop/training activities (e.g., airfare, registration, hotel) for these individuals. The

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travel expense online system is exclusively for district employees. Parents/guardians, student representatives, and/or community members may seek reimbursement via an Independent Contractor Agreement accompanied by appropriate original, itemized receipts (Administrative Procedure 1550).

- f. **Absences as an officer of a non-district organization, committee member, and/or service club member.** Participation must be in the interest of the district and requires a Request for Absence on District Business submitted through the employee's chain of command with approval of the Chief of Staff prior to commitment. No Travel Authorization (TA) is required as no reimbursable expenses are involved.
- (1) Travel for non-district organizations. District funds will not be used for travel or expenditures unless attendance at such meetings is requested by the district.
  - (2) Travel for attendance at service club meetings. Reimbursement for expenses will not be approved by the district.
4. **Approval (authorization) of absence.** An employee's supervisor, department-level approver, or branch head, as applicable, must authorize all absences for travel and attendance at conferences. When authorizing an absence, consideration shall be given to the requirements and limitations outlined in this procedure.
5. **Approval of funding.** All absences for district business must be approved in advance by the management employee whose school or department budget is to be charged. Attendance or participation at *out-of-district meetings and/or conferences* requires compliance with the following:
- a. Management employee whose school or department budget is to be charged must approve funding *prior* to the employee's attendance or participation.
  - b. The employee who is attending the conference/event completes and submits an online Travel Authorization (TA) three weeks prior to the event to ensure approvals and necessary prepayments are obtained and processed by vendor's stated deadlines.
6. **Authorized expenses.**
- a. **Travel outside of San Diego County.** Reimbursement is limited to a maximum of 72 hours for in-state and 96 hours for out-of-state travel. All in-state trips in excess of three days and all out-of-state trips in excess of four days must be approved by the employee's branch head as an exception. Authorized expenses include:
    - (1) **Substitutes**, when required and funds are available.
    - (2) **Conferences**, as determined by availability of funding, conference location, and availability of substitutes. A parent/guardian, student representative, and/or community member may be selected as a second representative for those meetings directed to staff and community. Parents/guardians, student representatives, and/or community members may seek reimbursement via an Independent Contractor Agreement accompanied by appropriate original, itemized receipts (Administrative Procedure 1550). Representatives should have a clearly defined subsequent responsibility to provide inservice training to ensure

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the site/department receives a benefit from the attendee's participation. Note: With prior approval of the branch head, travel expenses for the representative may be paid by a district employee on behalf of the non-employee traveler. These expenses may be included in the employee's claim for reimbursement provided that original, itemized receipts are obtained and submitted with the expense reimbursement report, along with a written explanation describing the nature and need for reimbursement.

- (3) **Meals.** Reimbursement is provided on a per-diem allowance basis not to exceed \$46 daily. Receipts are not required for meals when per-diem is claimed.
- (a) Travel for 24 hours or more. The daily per-diem allowance for meals constitutes a maximum daily reimbursement rate of \$9 for breakfast, \$12 for lunch, and \$25 for dinner. To receive an allowance for all three meals, a traveler must be on travel status for a full 24-hour period. A 24-hour period is calculated from the time of departure on the first day to the same time on the second day, and to the same time on each succeeding day. Note: The time of departure on travel claims may commence when the employee leaves his/her residence for the airport.
  - (b) Travel for less than 24 hours. For travel that is a fractional part of a period of 24 hours, the maximum authorized meal allowance may be claimed. If the travel extends past 9:00 a.m., breakfast may be claimed; if the travel extends past 2:00 p.m., lunch may be claimed; and if the travel extends past 6:00 p.m., dinner may be claimed.
  - (c) Attendees are not eligible to receive a meal allowance for any meals that are included in the registration fee for conferences, eligible workshops, and meetings. The daily per diem allowance must be reduced by the applicable meal allowance for the meal(s) provided. A copy of the registration form/brochure must be attached to the travel expense report when requesting reimbursement.
  - (d) If expenses exceed limitations, original itemized receipts must be submitted with the Expense Report. Exceptions must be approved by the employee's branch head.
- (4) **Lodging.** Reimbursement is limited to three nights for in-state and four nights for out-of-state travel. For conferences, the room rate must not exceed the rates quoted in the conference brochure; for all other business travel, the cost of lodging must be reasonable and subject to the review and approval of the branch head.
- (5) **Transportation.** Reimbursement shall be for actual airfare or other public transportation costs or personal car mileage reimbursement. Mileage reimbursement from the employee's home to the airport may be reimbursed in lieu of the parking fee if the mileage is less than the parking fee.
- (a) Air travel must be by commercial airline only; the most economical rates must be used. If a reduced airfare can be achieved by an employee remaining at the conference location over a weekend, lodging and meals

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over the weekend may be reimbursed if the total cost is less than the airfare cost had the employee not stayed over the weekend. Documentation from the travel agency is required to show the savings to the district. Airline tickets may be purchased directly from the airline company or a travel agency. However, if purchased directly from the airline, payment must be made by the traveling employee and the employee may claim reimbursement after the trip. Airlines will not agree to issue tickets immediately and wait for payment.

- (b) Personal/rental vehicle expenses may be authorized for traveling employees who wish to drive their own or a rental vehicle for personal reasons, provided that absence from the job is not greater than that required by public transportation. Employees may claim reimbursement for mileage at the rate established for in-district use of personal cars, not to exceed the amount of tourist-class airline fare between points involved<sup>1</sup> plus the airport transportation fare to and from the conference site.
  - (i) The district does not rent vehicles for employees traveling on district business. Renting a vehicle is the responsibility of the employee. Employees must make all necessary arrangements to rent a vehicle and pay for the rental. The rental cost may be submitted for reimbursement after the trip. An original, itemized receipt is required. Written justification is required for all vehicle rentals and must be documented on the Expense Report.
  - (ii) Mid-size car rentals at the destination are authorized, if the cost is less than the cost of a taxi or shuttle service.
  - (iii) Reimbursement of other expenses incurred in the use of a personal vehicle (e.g., lodging and meals en route, parking or garage charges en route) are not authorized if the expenses exceed those that would have been required had the employee used public transportation.
  - (iv) Mileage for use of a personal car must be with the limitations specified in this procedure. The rate of reimbursement for use of a personal car for district business is the current applicable Internal Revenue Service (IRS) rate per mile for actual miles traveled (less daily commuting miles, if applicable).
- (6) **Miscellaneous** directly related expenses (e.g., taxi, parking, registration fee, tips, business telephone calls/fax transmissions).
  - (a) Telephone calls are limited to one call per day to the employee's home. Prudence shall be exercised when calling home. Phone calls placed directly from hotels can be costly and should be limited to a reasonable time period.

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<sup>1</sup> The limitation "not to exceed the amount of tourist-class airline fare between points involved" does not apply when two or more employees are transported in the same vehicle.

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- (7) **Books, supplies and other materials** sold at a conference may be purchased by the employee for sites/departments and claimed for reimbursement.
- b. **Travel within San Diego County.** Reimbursement for travel within San Diego County does *not* include meals or lodging. Reimbursement for travel within San Diego County is limited to conference registration fees, mileage for non-management employees, and parking fees. Expenses that may be authorized include:
- (1) **Substitute**, when required and funds are available.
  - (2) **Conferences.** Attendance at local conferences is limited to the number deemed appropriate by the employee's site principal/administrator or department head. For conferences planned for both staff and community participation, parents/guardians may be selected as representatives.
  - (3) **Mileage** for use of a personal car must be within the limitations specified in this document. The rate of reimbursement for use of a personal car for district business is the current applicable Internal Revenue Service (IRS) rate per mile for actual miles traveled (less daily commuting miles, if applicable).
  - (4) **Miscellaneous** directly related expenses (e.g., taxi, parking, registration fee, tips, business telephone calls/fax transmissions).
  - (5) **Books, supplies and other materials** sold at a conference may be purchased by the employee for sites/departments and claimed for reimbursement.
7. **Insurance Coverage.**
- a. **Personal/rental vehicle.** The district carries general liability insurance covering the use of a personal or rental vehicle when that vehicle is being used for district business by an employee acting within the scope of his/her employment. However, the employee's or rental agency's automobile insurance company, as prime carrier, pays first; district coverage takes effect only after the employee's or rental agency's carrier has paid. District insurance may cover medical expenses for occupants of the employee's automobile; however district insurance does not cover physical damage to personal or rental vehicles. Because of the potential for personal liability, employees using personal or rental vehicles should ensure that they carry adequate automobile liability coverage.
  - b. **Workers' Compensation.** When traveling on officially approved district business, all employees are covered by Workers' Compensation. Salaried employees with a position equivalent of 75 percent or greater are also covered under an accidental death and dismemberment policy when district travel is outside the corporate limits of the town or city in which the employee is regularly employed or resides.
8. **Legislation/lobbying activities.** Travel for matters related to legislation is limited to district government relations staff and others only as approved by the Chief of Staff. Expenses incurred in connection with lobbying activities must be reported in accordance with Administrative Procedure 0705.

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9. **Trip cancellations.** If a trip is cancelled after a Travel Authorization (TA) has been approved and passes budget check, an Expense Report must be created and submitted. This is necessary because the TA may have encumbered budgeted funds if prepayments were requested.
- a. The originating department must notify the travel agency if an airline reservation is involved, as well as the conference vendor or hotel, if applicable.
  - b. Reimbursement for expenses as a result of trip cancellation and non-attendance must be approved by the site principal/administrator or department head that originally approved the travel. Incurring expenses prior to a trip, other than prepaid items (i.e., airfare where the district is billed directly, conference registration fees, hotel accommodations) is only approved in rare circumstances.
10. All exceptions to this procedure must be approved by the branch head that approved the original Travel Authorization.

#### **D. IMPLEMENTATION**

1. **Advance approval is required for all absences on district business and related travel.** Before any travel arrangements are made and paid, the employee must submit the Request for Absence on District Business and receive approval from his/her department-level approver or branch head. If any expenses are expected to be incurred in conjunction with the absence, a Travel Authorization (TA) must be submitted and approved prior to making any travel arrangements or incurring any expenses. Any expenses incurred by an employee prior to receiving branch head approval of the TA may not be reimbursed, and may become the personal responsibility of the employee.
2. **Absence with salary and *with* reimbursement of expenses (including conferences in San Diego).** Travel Authorizations (TA) must be submitted online a minimum of two weeks in advance of the anticipated date of departure. Three weeks advance is recommended if prepayments are requested, such as airfare, hotel accommodations and registration fees. TAs are routed electronically from the requester to the site principal/administrator or department head and then to the respective branch head for approval. After branch head approval is obtained, the requester may proceed with making travel arrangements. Funding must be approved prior to the employee's attendance or participation.
  - a. Requester:
    - (1) Completes and submits Request for Absence on District Business for approval at least three workdays in advance. The completed and approved form must be retained by the site/department timekeeper. Do not send copies of this form to any department, including Accounts Payable, unless specifically requested to do so.
    - (2) Completes and submits an online Travel Authorization (TA).
    - (3) Advance payments:
      - (a) Airfare. Upon branch head approval, makes necessary arrangements through a travel agency, providing the agency with the TA number. The



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travel agency must agree to invoice the district directly by sending an original, itemized invoice to the Accounts Payable Department, 4100 Normal Street, Room 3141, San Diego, CA 92103. The invoice must reference the employee's travel authorization form number and the employee's name.

- (i) Employee prints a hard copy of his/her TA and attaches a copy of the itinerary from the travel agency. The Accounts Payable Department will follow up and ensure an original invoice is received and will then pay the vendor directly upon verification of branch head approval.
  - (ii) Employee submits airfare expense receipt, airline confirmation letter, or e-ticket confirmation to the Accounts Payable Department with a hard copy of the online Expense Report after the trip.
- (b) Registration fees and hotel accommodations. Following branch head approval, requester makes necessary reservations and requests written confirmation (fax acceptable) for hotel reservation. Employee prints a hard copy of his/her TA, attaches the conference registration form and hotel confirmation, and forwards to the Accounts Payable Department. The hotel portfolio must be submitted to the Accounts Payable Department with a hard copy of the online Expense Report after the trip.
- (c) Advancement of funds. In rare cases of financial hardship, the Superintendent or designee may authorize the advancement of funds to a district employee, or approve payment be made to an association or outside parties, to cover necessary expenses such as meals and parking. The employee must provide written justification for the request and obtain the Superintendent's or designee's signature. Immediately after the trip, employee must submit his/her Expense Report listing all expenses incurred and provide original, itemized receipts. Any advance funds will be deducted from the total claim.
- b. Accounts Payable Department, prior to requester's travel:
- (1) Receives hard copy of the TA from requester, along with documentation for advance payment requests (e.g., itinerary/invoice from travel agency, completed conference registration form, itemized hotel confirmation).
  - (2) Processes for payment all expenses approved to be paid in advance and remits payment directly to vendors.
- c. Human Resource Services provides substitute if requested.
- d. Requester, immediately upon return from travel:
- (1) Reports to immediate supervisor on conference or activity.
  - (2) Completes and submits Expense Report, prints a hard copy and attaches all necessary original, itemized receipts and forwards to site principal/administrator

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or department head. An Expense Report must be submitted even if no reimbursement is due. (Note: Receipts are not required for meals when per-diem is claimed.)

- e. Site principal/administrator or department head reviews receipts and approves Expense Report, returns to requester for submission to the Accounts Payable Department.
  - f. Accounts Payable Department, upon receipt of approved Expense Report for receipts:
    - (1) Reviews claim online for proper approvals, documentation and compliance with the requirements outlined in this procedure.
    - (2) Processes payment to employee and mails warrant to employee's home address, as it appears on the employee's official personnel record.
3. **Absence with salary but *without* substitute or reimbursement of expenses.**
- a. Requester completes and submits Request for Absence on District Business for approval at least three workdays in advance. The completed and approved form must be retained by the site/department timekeeper. Do not send copies of this form to any department, including Accounts Payable, unless specifically requested to do so.
  - b. Supervisor considers criteria and limitations outlined in this procedure; if requested absence is approved, employee may proceed with creating and submitting TA.
  - c. Timekeeper enters absence on time sheet, if applicable.
4. **Travel related to special project-funded programs and entitlements.** Refer to project guidelines.
5. **Travel related to conference or workshop in San Diego County (without expenses).**
- a. Requester submits Request for Absence on District Business.
  - b. Blanket approvals:
    - (1) Branch head issues written blanket authorization via Information Circular.
    - (2) Employee notifies supervisor of intent to attend local conference or workshop.
    - (3) Timekeeper enters absence on time sheet, if applicable.
  - c. Conferences and workshops using list of staff. Management employee sponsoring or coordinating activity prepares list of staff attending, attaches list to Request for Absence on District Business, and routes for approval. This eliminates the need to file individual Requests for Absence on District Business, but complies with law and district policy. A Travel Authorization is not needed.

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6. **Participation in non-district organizations.** Requester submits Request for Absence on District Business to site principal/administrator or department head. A Travel Authorization is not needed.
  7. **Travel at the expense of other agencies.** When travel expenses are paid entirely or partially by other agencies, employee prepares and submits an online Expense Report for documentation purposes. Employee should indicate and enter information regarding donor(s) and value of travel expense paid, and indicate a payment type of "personal expense" to show the item is not to be paid to a vendor or reimbursed to the employee. (This will assist employee in completing California Fair Political Practices Commission Form 700 when required).

**E. FORMS AND AUXILIARY REFERENCES**

1. Independent Contractor Agreement, available on the district website at <https://www.sandi.net/staff/strategic-sourcing-and-contracts/independent-contractor-agreements>
2. Travel Authorization, available through PeopleSoft Financial at <https://dwa.sandi.net/psp/financials/?cmd=login>
3. Expense Report, available through PeopleSoft Financial at <https://dwa.sandi.net/psp/financials/?cmd=login>
4. Request for Absence on District Business, available on the district website at [https://www.sandi.net/staff/sites/default/files/link/staff/docs/payroll/Request for Absence on District Business.pdf](https://www.sandi.net/staff/sites/default/files/link/staff/docs/payroll/Request%20for%20Absence%20on%20District%20Business.pdf)

**F. REPORTS AND RECORDS**

1. Site/department to retain Request for Absence on District Business forms.
2. Accounts Payable to retain all records related to payment of Expense Reports.

**G. APPROVED BY**



General Counsel, Legal Services  
As to form and legality

**H. ISSUED BY**



Chief of Staff