

AR 5611.1

## BSSD Travel Policy

### INTRODUCTION

- a. Overall Goal: To accommodate travel that occurs within the school District in a safe, convenient, and cost effective manner;
- b. Scope: These regulations apply to all District employees who are traveling on District approved business, as well as anyone who has been authorized to travel at District expense, such as educational consultants, School Board members, Advisory Education members, etc.

### PROTOCOL FOR REQUESTING TRAVEL

- a. Traveler submits travel to Supervisor.
  - In-State: all travel request for travel within Alaska shall be made no later than 14 calendar days prior to the start of travel.
  - Out-of-State: all travel request for travel outside of Alaska shall be made no later than 21 calendar days prior to the start of travel.

**Any exceptions to this must be approved by the Superintendent**
- b. All travelers must use the Travel Request/Reimbursement Form (TRF)
  - The TRF initially represents formal order for transportation services.
  - The TRF shall be used for official travel only.
  - The TRF must include:
    1. Name of the travelers)
    2. Dates of travel
    3. Destination
    4. Account code to be charged
    5. Purpose of travel
  - All copies of the TRF are submitted to the Travel Department.
  - The Travel Department will process travel and return completed itinerary to the traveler.
  - On the day of travel, passenger is responsible for checking Google Travel Calendar or the carrier for updated travel times.
  - All travel changes shall be made through the Travel Manager. The passenger will not create or revise travel without prior approval of the Travel Manager or the Superintendent, unless in an emergency.
- c. Travel Approvals
  - Only persons who have proper authorization may travel at District expense. Family members or companions are not authorized to accompany employees at District expense.
  - Each traveler, except for those individuals specifically authorized by the Superintendent or designee, must have the approval of his or her supervisor documented on the TRF prior to departure.

- Approval of travel authorization forms may not be delegated to a level of authority lower than the traveler.
- The Superintendent must approve all out of state travel.

### DISTRICT PLANE EXPECTATION

- a. Seat fare and charter rates are maintained on a sheet available from the Travel Manager.
- b. Be ready and at the airport 30 minutes before the flight departs.
- c. Baggage and Freight:
  - Baggage weight limit is 40 pounds per person. Excess baggage must be noted on travel request.
  - All baggage and freight should be weighed and tagged or labeled before being taken to the airplane.
  - All freight traveling on the district airplane must be approved by the BSSD Airplane Operations Technician.
- d. Travel Google Calendar:
  - Web based calendar (Google Calendar) will be maintained within 20 minutes of the plane's actual schedule. After itineraries are issued, they will not be reissued to travelers for schedule and time changes.
  - All changes will be reflected on the Travel Google Calendar. It is the responsibility of the Principal and the traveler to check the Travel Google Calendar at the beginning of the scheduled travel day as well as throughout the day to assure the schedule has not changed.
- e. Communication:
  - Primary communication with the District Airplane shall be by district issued marine radio. Each site shall keep the district marine radio on Channel 05 at all times. Power, squelch, and volume should be checked at the beginning of each day.  
**Note: Typically, the District Airplane will call in 20 minutes prior to arrival.**
  - For secondary communications, Principal's have a radio in their residence.
  - Lastly, the pilot has a satellite phone he can use to communicate with the site. The Principal shall provide a current cell phone number. It is critical that the pilot spends the minimum amount of effort to contact a site for notifying arrival time.
  - It is the Principal's responsibility to:
    - i. Assure smooth communication with the pilot.
    - ii. Contact the Travel Manager if the plane is over 20 minutes late. If the Travel Manager is not available, contact the BSSD Airplane Operations Technician and then the Superintendent.
    - ii. Non-employee travel is subject to approval from the Superintendent. BSSD operates under FAA Part 91 as a private carrier. As such, the school District will never compete with commercial carriers who operate under FAA Part 135.3
- f. No passengers or freight will travel for "free."

## WEATHER EXPECTATIONS

- a. The purpose of this policy is to avoid unnecessary risk to life and safety of employees during School District approved winter travel by aircraft.
- b. Be considerate of weather conditions when taking people to the airport. (Ex: Dropping passengers off 30 minutes early when the weather is -30°F is not necessarily a good idea.)
- c. Students will not be allowed on piston aircrafts if the temperature at the departure or destination site is below -35°F. Students will not be allowed on turbine aircrafts (i.e. BSSD N406SD) when the temperature at the departure or destination site is below -40°F. These limits are board policy and are non-negotiable. (BP 3543)
- d. The Principal may choose to cancel travel for his/her students or staff if conditions appear unsafe. However, such a decision should be made prior to the aircraft's departure to pick up those passengers. Once an aircraft departs for the pick up, the site will be charged for the trip.
- e. If airlines cancel due to weather, the District Airplane will cancel unless weather changes.
- f. Employee travel at temperatures colder than the aforementioned limitations (-40°F) will be at the sole discretion of both the employee and airlines.
- g. Employee travel on jet aircraft is not covered by this policy.
- h. The temperature at either the place of departure or the place of arrival will be based upon a National Weather Service reading or a temperature reading from an approved source. Approved sources shall be airline village agent(s) or an Automatic Weather Station (AWOS).

## SAFETY AND ACCIDENT REPORTING

- a. If a vehicle accident occurs, the traveler shall:
  - Secure the names and addresses of all persons involved in the accident and all witnesses and owners of damaged property; the make, model, registration number and insurers of all vehicles.
  - Notify the state troopers or local police immediately.
  - Make no statement to anyone, except the proper authorities, as to who may have been at fault nor any statement which may even remotely be interpreted as an apology or as an acknowledgement of any responsibility for the accident (to do so may adversely affect the ability to rightfully defend the School District or the individual making such statements in subsequent legal proceedings).
  - Report the accident to the immediate supervisor and Business Office Manager. The District may request documentation detailing the accident.

## ADMINISTRATIVE PROCEDURES FOR TRAVEL EXPENSES AND ALLOWANCES

### a. Definitions

- **Non-Reimbursable Expenses:** Certain expenses, such as the following, are considered personal expenses and are not reimbursable.
  - I. Travel accident insurance in excess of that provided to employees by the School District.

- II. Vehicle repairs, towing services, lubrication, tire replacement, etc. for privately owned vehicles
  - III. Meals at the traveler's workstation or residence
  - IV. Childcare or babysitting fees
  - V. Personal telephone calls, including calls to the traveler's home or family
  - VI. Fines or penalties for parking or other violations
  - VII. Laundry and dry cleaning charges, except pre-authorized by the Superintendent
  - VIII. Entertainment expenses, except as pre-authorized by the Superintendent
  - IX. Personal travel related expenses (including the incremental cost of additional lodging or room charges for family members, travel companions and others not on authorized School District business)
  - X. Hotel stays and vehicle rentals beyond approved District travel dates
  - XI. The rental of GPS units or other added items to a rental vehicle
  - XII. Hotel stays of less than six (6) hours, unless pre-authorized by the Superintendent
- **Per Diem:** the daily rate of payment to a traveler in lieu of reimbursement for actual charges for meals, tips and other incidental expenses incurred while traveling on District business.
  - **Residence:** each traveler's community where the traveler maintains a dwelling. If a traveler maintains more than one residence, the residence most clearly related to the traveler's workstation will be considered the traveler's principal residence.
  - **Travel Expenses**
    - I. Transportation expenses consist of commercial carrier fares, vehicle mileage allowance, taxi, and bus fares and other essential transportation costs.
    - II. Travel related expenses consist of charges for lodging, meals, tips and other incidental expenses incurred while traveling.
    - III. Other expenses consist of charges for conference and registration fees, business telephone calls, parking fees, emergency purchase of supplies and other necessary costs related to travel.
  - **Workstation:** each traveler's community where the traveler spends the major portion of working time or the place to which the traveler normally returns upon completion of assignments.
  - **Superintendent:** will mean Superintendent or his/her designee.

b. Mode of Travel

- Scheduled Commercial Air Carrier
  - I. Scheduled commercial air carrier service shall be utilized for long distance individual travel, unless there is a compelling reason for use of another mode, such as medical necessity, less costly charter flights or inadequate time schedules.
- Chartered Aircraft
  - I. Chartered aircraft, with pilot, may be authorized when no scheduled

transportation is available to meet the travel requirements and the aircraft chartered has an Air Taxi Certificate issued by the Alaska Transportation Commission.

- Privately Owned Aircraft
  - I. Travel by privately owned aircraft is **strictly prohibited** by the District.
- Automobile Rental
  - I. Automobile rental may be utilized when such use is in the best interest of the District.
  - II. The traveler must obtain the lowest and most economical rate available.
  - III. Rental vehicles may be utilized for authorized purposes only. The District's insurance of rental vehicles is effective only while an authorized driver is using the vehicle for authorized purposes.
  - IV. Since the District's insurance covers vehicle damage, liability, and hospitalization, insurance coverage offered by car rental agencies will not be paid or reimbursed.
  - V. Vehicles should be inspected for physical damage before first use and at the time returned in order to prevent misunderstandings with rental agencies.
  - VI. If a rental vehicle is used for personal purposes, the reimbursement request should be adjusted for any incremental costs related to the extended term of the contract, mileage driven or fuel charges incurred.
  - VII. When possible, the sharing of rental vehicles is encouraged.
  - VIII. The fuel tank should be filled prior to returning the vehicle.
- Taxi Service
  - I. Taxi service should be used whenever practical.
- Special Transportation
  - I. Special transportation, including automobile, boat, aircraft or other conveyance may be authorized when in the best interest of the District. An explanation of the facts and circumstances documenting the necessity to use such special transportation must accompany the related travel request form.
  - II. A traveler may be reimbursed at rates agreed upon in advance for the use of boats, snow machines or other special conveyances.

#### c. Transportation Expenses

- Travel Routing
  - I. Travel routing must be the most direct route and efficient mode unless authorized by the Superintendent.
- Travel for Employee Convenience
  - I. Any extra expenses resulting from travel on District business by an indirect route or less efficient mode for the traveler's convenience will be borne by the traveler and reimbursement will be based only on such charges as would have been incurred or reimbursed in traveling by the most direct route or efficient mode.
  - II. Any additional time away from work that may be required for such indirect

travel shall be charged to annual, sick, or leave without pay.

III. Personal travel time must be identified on the traveler's expense report.

#### Interruption or Extension of Travel

- I. Per Diem or reimbursement allowances may be paid for periods of interruption or extension or travel incurred for the benefit of the School District.
- II. If travel is interrupted or extended for the personal convenience of the traveler, the per diem or reimbursement allowed may not exceed that which would have been incurred by uninterrupted travel.
- III. Payment arrangements for the personal portion of the expenses should be made directly with the travel agency, airline or other vendor. Charges applicable to the personal portion of travel costs should not be processed through the District's accounting records.
- IV. No travel changes shall be made after a trip is booked unless for a family or medical emergency. A family member is considered a parent, a spouse, or a child.
- V. Trip extensions in excess of five (5) days on District approved travel for personal reasons require Prior Superintendent approval. Should a person exceed the five (5) days, without proper authorization, the traveler is responsible for booking, paying, and returning to site.
- VI. Travel days are not considered part of the five (5) personal days.
- VII. Travelers who wish to extend their trip for personal reasons, outside the five day window can book their own flight and be reimbursed for what the District would have paid for the direct round trip flight.

#### Economical Accommodations

- I. Travelers must utilize the most economical transportation available, unless;
- II. Lower cost transportation methods are not available within reasonable time periods;
- III. Lower cost transportation is not in the best interest of the School District; or
- IV. Waiting for lower cost transportation would result in a high overall cost.
- V. If a person extends a trip for personal reasons and is staying in a District paid hotel, the person should checkout of the District reservation and book a personal reservation for the personal portion of the trip.

#### Discount Fare Savings

- I. Travelers are not entitled to any savings resulting from the use of discount fares, such as "Super Savers". If a traveler exchanges or modifies a District paid ticket, any cost savings must be remitted to the District.

#### Acceptance of Gratuities

- I. No employee or official may accept any gratuity resulting from, or based on District travel, unless such gratuity is received for the exclusive benefit of the District or is nominal in value.
- II. Acceptance of such gifts from an airline, travel agency or other vendor is governed by policy 33.15 and related regulations regarding ethics and ethics violations.

- Baggage Charges
  - I. Baggage charges paid or reimbursed by the District will be limited to personal and District baggage necessary to carry out District business.
  - II. Baggage must be shipped by the most economical and practical means available, and the reason for incurring excess baggage charges must be explained on the traveler's expense report.
- Travel Insurance
  - I. Group travel accident insurance is provided for each employee or board member while traveling on District business. Non-employees traveling on District business are not covered.
- Canceled Reservations
  - I. The District will not be responsible for payment of penalties for guarantees or reservations not canceled due to the traveler's negligence. If a traveler determines that he or she will not use accommodations, which were reserved, the traveler is responsible for release of such reservation within the time limits specified by the carrier, hotel or other vendor.
- Return of Unused Tickets
  - I. Any unused ticket, or portion of a ticket, for travel that was canceled or terminated short of the scheduled destination shall be attached to an appropriately noted expense report requesting that a refund be obtained from the carrier, travel agency or other vendor.

d. Travel related Expenses

- Employees and others authorized to travel may be reimbursed for travel related expenses at the applicable per diem rates, or at actual cost for lodging plus per diem rates for meals and incidental expenses, or at the actual costs for all expenses at the approval of the Superintendent. The method of reimbursement must be documented on the travel request form.
- More than one method of reimbursement may be utilized for a single trip, if a reasonable basis for such treatment is documented on the travel request form and the arrangement is approved in advance.
- Reimbursements at the lower of actual cost or per diem may be utilized if the agreement to reimbursement on such basis is made in advance of the travel.
- Reimbursements at actual may be limited to the costs expected to be incurred at moderately priced establishments catering to the general public.
- Per Diem Reimbursement Allowances
  - I. Alaska Rate: The per diem reimbursement rates for travel in Alaska shall be the rate authorized by the Superintendent.
  - II. General Rate: The general per diem reimbursement rates for travel outside of the District shall be the rate authorized for payment by the federal government in the locality (including international travel) in which the travel is performed.
- Lower Per Diem Reimbursement Allowance
  - I. The Superintendent may approve lower per diem rates than the standards defined in these regulations if the circumstances of the travel so warrant.

Such circumstances may occur when a traveler stays in District facilities or other special circumstances exist.

- Group Travel
  - I. Meal allowances may be paid directly to members of a group or applied to the cost of group meals, banquets, etc. Meal allowances for groups may not exceed authorized per diem allowances. Supporting documentation, including receipts for cash allowances provided to members of the group will be required. Approval of the Superintendent will be required for the payment of meal allowances at rates below those authorized by these regulations.

e. Computation of Allowances

- Appropriate Reimbursement Rates
  - I. The appropriate per diem reimbursement for a day is the rate prescribed for the community in which the traveler obtains overnight lodging.
  - II. If a per diem rate is not available for a specific location, the rate for the nearest major community or locality shall be utilized.
  - III. For travel within the District or to the lower 48, payment shall be at the rate established by the Superintendent.
  - IV. All reimbursements must be submitted no later than 30 days upon completion of travel.
  - V. In order to receive reimbursement, a traveler must submit receipts for all travel expenditures including expenditures done with the district credit card or with purchase orders or the per diem request will not be considered complete and not be paid. The 30 day deadline from IV above still applies.
  - VI. If charges are incurred and documentation is not provided after the 30 day period, the person incurring the charge will have the amount withheld from their pay and have 30 days to submit documentation for reimbursement after the amount is withheld.