

REGULATIONS FOR A-5

1. General Background:

- A. A-5 delineates the requirements and procedures regarding reimbursement for travel expenditures of school district officials and Board Members.
- B. Travel expenditures are defined as “those costs paid by the school district...., whether directly by the school district or by employee reimbursement....”
- C. Boards are required to implement a policy and procedures pertaining to travel expenditures for its employees and school Board Members.
- D. Boards shall ensure through its policy and procedures that all travel is educationally necessary and fiscally prudent.

2. Requirements for Reimbursement of School District Travel Expenditures:

- A. Expenditures must be directly related to and within the scope of the employee’s or Board Member’s current responsibilities, and for school district employees, the school district’s professional development plan.
- B. Expenditures must be for travel that is critical to the instructional needs of the Board or that furthers the efficient operation of the Board; and,
- C. Expenditures must be in compliance with State and Federal travel payment guidelines.

3. A-5 Applies to Four Types of Travel Events:

- A. Training and Seminars
 - 1. All regularly scheduled, formal residential or non-residential training functions, conducted at a hotel, motel, convention center, residential facility or any educational institution or facility.
- B. Conventions and Conferences
 - 1. General programs, sponsored by professional associations on a regular basis.
 - 2. Address subjects of particular interest to a Board or are convened to conduct association business.
 - 3. Purpose of attendance is the development of new skills and knowledge.
 - 4. Distinct from formal staff training and seminars.
- C. Regular School District Business Travel
 - 1. All regular official business travel.
 - 2. Includes attendance at meetings, conferences and any other gatherings not covered by the above.

D. Retreats

1. Meetings with school district employees and school Board Members held away from the normal work environment at which organizational goals and objectives are discussed.

4. Process of Approval

- A. For employees - Travel may occur only upon (1) prior written approval of the chief school administrator and (2) prior approval by a majority of the full voting membership of the Board..
- B. For Board Members - Travel may occur only upon (1) prior approval by a majority of the full voting membership of the Board and (2) travel must be in compliance with N.J.S.A. 18A:12-24 and N.J.S.A.18A:12-24.1.
- C. For regular business travel - A board may authorize in its travel policy an annual maximum amount, per employee, for regular business travel for which school board approval is not required.
- D. A board may also approve, at any time prior to the event, travel for multiple months as long as the board approval itemized the approval by event, total cost and number of employees and board members attending the event.
- E. General or blanket pre approval is not authorized.

5. Board's Travel Policy Shall Include, Among Other Things:

- A. The applicable restrictions and requirements set forth in the State and Federal guidelines; i.e., types of travel, method of transportation, mileage allowance, etc.
- B. A requirement that the employee/Board Member submit a brief report that includes the primary purpose for the travel and the key issues addressed at the event.
- C. Detailed documentation be maintained on file demonstrating compliance, including travel approvals, reports and receipts.
- D. Board Members must recuse themselves from voting on travel if Board Member, a member of his/her immediate family, or a business organization in which he/she has an interest, has a direct or indirect financial involvement.

6. Overnight Travel

- A. Per diem payment or reimbursement for lodging and meals will be actual reasonable costs, not to exceed the federal per diem rates.
- B. If a Board Member/employee stays at the hotel that is the site of the convention, conference or seminar, they can be reimbursed at the hotel rate, even if it is in excess of the federal per diem rates. For example, if the NJSBA convention in Atlantic City is being held at the Sheraton, Board Members can be reimbursed the rate at the Sheraton, even if it is greater than the federal per diem rates.

- C. If the hotel at the site of the convention, seminar or meeting is no longer available, lodging may be paid for similar accommodations at a rate not to exceed the hotel rate for the event.
- D. Boards shall patronize hotels and motels that offer special rates to government employees unless alternative lodging offers greater cost benefits.

7. Scope of Travel Expenditures

- A. Board travel expenditures include costs for:
 - 1. Transportation
 - 2. Meals
 - 3. Lodging
 - 4. Registration or conference fees
 - 5. Required training costs
 - 6. Professional development and staff training
- B. Boards cannot reimburse for the following:
 - 1. Car rentals
 - 2. Limousine services
 - 3. Chauffeuring costs to or during an event

8. Budget Submission Requirements

- A. Board shall establish, by school board resolution, a maximum travel expenditure amount for the budget year, and must not go over that amount.
- B. Resolution shall include the maximum amount established for the pre-budget year and the amount spent to date.
- C. Penalties for failure to abide by established maximum travel expenditures include sanctions, including a reduction of State Aid in an amount equal to any excess expenditure.

9. Other Penalties

- A. A person who approves travel in violation of the Board's policy shall be required to reimburse the Board in an amount equal to three times the cost associated with attending the event.
- B. An employee or member of the Board who travels in violation of the Board's policy shall be required to reimburse the Board in an amount equal to three times the cost associated with attending the event.