



Travel Policy

I. PURPOSE & PHILOSOPHY

The purpose of this policy is to establish procedures for authorization of travel by Providence Hall Charter School (PHCS) employees, officials, or agents (travelers) who may be required to travel in fulfilling their official duties or in attending seminars, conferences or other professional or educational activities benefitting PHCS.

II. DEFINITIONS

- A. **Airfare** is defined as the costs incurred by a traveler to obtain common air carrier transportation services in order to participate in approved conferences or conduct PHCS business.
- B. **Car rental** is defined as use of a non-personal, non-PHCS owned vehicle, for which a rental charge is imposed for use of the vehicle.
- C. **Ground transfer** is defined as the costs related to transporting a traveler to and from airports or transportation terminals, whether by private or public carrier and the costs of parking private vehicles at transportation terminals.
- D. **Hotel accommodation** is defined as the costs of providing overnight lodging incident to an approved travel event.
- E. **Mileage reimbursement** is defined as the reimbursement for costs incurred by a traveler to transport themselves and/or others in a personal vehicle, other than a rental car or PHCS vehicle, to an approved conference or convention or to execute PHCS business.
- F. **Per diem** is defined as a daily allowance paid to a traveler to cover expenses while working away from home.
- G. **Registration** is defined as a fee paid or reimbursed by PHCS which registers a traveler to attend a conference or event sponsored by another private or public entity.
- H. **Travel** is defined as using ground, sea or air transportation to attend a conference or convention or to execute PHCS business which is related to a traveler's work assignment yet is outside the customary work routine and away from the regular work assignment prescribed by the traveler's regular work assignment. Travel to such events may or may not require overnight lodging.

III. GENERAL POLICY INFORMATION

- A. It is the general intent of the Board of Trustees (Board) to fund or reimburse travelers for actual travel expenses which are approved through the PHCS travel request process.
- B. Travel expenses related to pre-allocated budget allowances will be reimbursed up to the amount of the budget allotment. Reimbursements enumerated in this policy are intended to pay for job-related travel expenses only.
- C. This policy applies to all travelers who travel to conferences, conventions and approved travel undertaken for execution of PHCS business.
- D. Travelers are responsible for making their own travel arrangements and, in cases where air transportation is used, must secure a price quote from the State Travel Office and one other source for air travel. These quotes are to be forwarded to the Business Manager and Director along with a brochure detailing any conference registration fee amount, dates, location and other information incident to the conference.



- E. This travel policy does not permit traveler's family members, friends or other travel companions to take trips which are funded or processed in any way by PHCS funds. All travel expenses of family members, friends, or other travel companions must be paid directly from the personal financial resources of the traveler without being intermingled with v financial transactions.

IV. PAYMENT OF TRAVEL EXPENSES

Travel expenses are to be paid as follows:

A. PHCS Purchase/Credit Card:

It is preferable, that travelers make their travel reservations and pay their travel expenses with their authorized purchase/credit card. Travelers authorized to hold a purchase/credit card, may use their cards to make travel arrangements and pay travel expenses on behalf of other travelers when those travelers do not hold a purchase/purchase/credit card and the travel is approved by the Executive Director.

B. **If the traveler does not have a PHCS purchase/credit card and their supervisor will not travel with them or does not hold a purchase/credit card:**

At the time the travel request is submitted, the request should indicate that registration, airfare, and hotel payments are to be paid by check to the traveler. Checks for registration and airfare will be issued as soon as the travel request is approved.

C. **Reimbursement:**

Travelers may purchase pre-approved travel (including airfare, car rental, ground transfers, conference registration, etc.) using personal funds and submit for reimbursement using the regularly established reimbursement procedures for all other purchases. Reimbursement will not be made for travel that was not approved by the Director through the travel request process.

V. MEALS

- A. Travelers may receive up to a \$45 daily reimbursement allowance for meals they purchase during approved travel for travel that is more than 100 miles from PHCS's primary facility.
- B. Travelers will be reimbursed for actual meal expenses, including tax and gratuity. Travelers should exercise good judgement and keep meal expenses as low as reasonably possible.
- C. Meal reimbursement will not be given for meals that are included in the registration or participation cost of any conference, meeting, or event associated with approved travel nor for meals that are included in the cost of accommodations.

VI. AIRFARE

- A. When securing airfare rates, travel coordinators should always contact the Utah State Travel Office to obtain a price quote. State travel rates usually include travel insurance and allow the traveler to change itineraries without penalties. Obtaining this price quote also provides the traveler a basis for judging the suitability of other rate quotes.
- B. Air transportation is limited to economy class. When special and reduced fares are available, they should be secured unless doing so will leave PHCS at risk because of the loss of insurance coverage or unduly open PHCS to the potential of financial damage.



VII. GROUND TRANSFER ALLOWANCE

When air transportation is approved, a ground transfer allowance is provided for taxi or van service, and parking of personal vehicles at transportation terminals. Purchase/credit cards are not to be used to pay ground transfer expenses. Travelers should pay expenses as they occur and submit for reimbursement using the regular reimbursement request process. When parking vehicles, travelers should use the most cost-effective parking option.

VIII. HOTEL ACCOMMODATIONS

- A. Hotel accommodations are approved for the number of days a conference is in session, less one. One additional night of hotel accommodations is approved when an additional travel day is required prior to a conference. A second additional night of hotel accommodations is approved when an additional travel day is required after the conference concludes. Other additional days of hotel accommodations will be allowed only when approved in advance of the conference start by the funding budget director and the business administrator.
- B. Travelers shall secure hotel accommodations at a daily rate which is reasonable for the area, and should consider other factors affecting overall travel cost, including distance from the hotel to the conference or event location, the availability of meals, shuttle or transfer service, etc.
- C. A traveler may elect to stay with friends or relatives or use personal abodes, campers or trailers instead of staying in a hotel. When using these kinds of overnight accommodations, the traveler will request and receive approval for alternative lodging and associated expenses prior to approval of the travel request.
- D. Hotel accommodations will be funded only once per conference. Hotel designation payments will not be paid when hotel accommodations are included as a portion of the conference fees.
- E. If a traveler receives a prepayment check for hotel expenses and they or another traveler pays the charges with a PHCS purchase/credit card, the prepayment check amount must be refunded to PHCS.
- F. Hotel expenses will not be paid by any PHCS entity for conferences which are less than 100 miles from PHCS's primary facility.

IX. MILEAGE REIMBURSEMENT

A. Travel of Less Than 100 Miles

When travelers are approved for travel to a conference or event that is less than 100 miles from PHCS's primary facility, use of PHCS vehicles is preferred. If PHCS vehicles are already reserved, then when travelers are approved through the travel request process to drive personal vehicles to a conference or other event that is less than 100 miles from PHCS's primary facility, reimbursement is allowed for all round trip miles for each day the traveler is approved to attend the conference or event.

B. Travel of More Than 100 Miles

When travelers are approved through the Travel Request Process to drive personal vehicles to a conference which is more than 100 miles from PHCS's primary facility, the total mileage reimbursement will be an amount which will not exceed the cost of airfare, had it been available and used. When airfare is less than mileage reimbursement, travelers are encouraged to arrange air transportation.



C. **Mileage Calculation**

Mileage is calculated from PHCS's primary facility or traveler's starting location, whichever is shorter, to the destination and back, using Google Maps as verification. Reimbursement will be made using the current maximum allowable rate defined by the Internal Revenue Service. Mileage will only be reimbursed for travel that is greater than 25 miles one way from PHCS's facilities in Herriman, Utah.

X. **RENTAL CARS**

- A. Rental cars are not allowed without prior approval from the Executive Director. All requests for rental cars must be included in the PHCS travel request.
- B. When rental cars are approved, only actual documented expenses will be funded or reimbursed by PHCS.

XI. **EXCESSIVE CHARGES**

PHCS will not fund any travel expenses which are unrelated to the approved travel purpose. Travelers will be required to reimburse PHCS for travel charges which are unrelated to the travel purpose or which are determined to be excessive.