

Board Adopted: July 13, 2009
Last Reviewed: June 27, 2022 [5 year cycle]
Board Revised: April 8, 2026
Board Approved: April 27, 2026

Contact Person: Executive Director of Finance and Support Services

POLICY 412 EXPENSES REIMBURSEMENT

I. PURPOSE

To provide a system for reimbursing employees for qualifying business expenses.

II. GENERAL STATEMENT OF POLICY

The Bloomington Public Schools shall establish a system to reimburse employees for qualifying District business expenses. The system will:

- A. Define a qualifying business expense.
- B. Identify examples of non-qualifying expenses.
- C. Require written pre-approval before a District business expense is made above a specified dollar amount.
- D. Define and prohibit conflict of interest purchases.
- E. Restrict purchases by employees who have announced their resignation or are retiring from the District.
- F. Require providing evidence of purchase, possession, and/or receipt of goods/services.
- G. Require all airfare, lodging, registration fees and other known cost be paid through District credit card or District check.
- H. Require signed approval by Administration. The Superintendent's reimbursements will require the signature of the School Board Chair or a designee from the School Board.

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REGULATION 412 EXPENSES REIMBURSEMENT

I. PURPOSE

- A. The Business Services Office shall provide a schedule of reimbursement rates for District business expenses, including those expenses requiring advance approval and specific rates of reimbursement.
- B. Written preapproval is required before a District business expense is made for anything other than basic mileage and parking cost reimbursements and must be attached to the reimbursement request.
- C. Purchases should be restricted by employees who are resigning or are retiring from the District.
- D. Allowable expenses would include transportation, meals, lodging, registration fees, required materials, parking fees, tips, and other reasonable and necessary District business-related expenses. (Alcohol, tobacco and vaping products are not an allowable reimbursable expense.) Lodging, registration and air transportation should be processed with District funds.
- E. Requests for reimbursement must be itemized on the official District reimbursement form with original receipts attached and submitted to an administrator for approval. Out of State travel requests need cabinet level prior written approval, which must be attached to the reimbursement approval request.
- F. Automobile mileage and meal reimbursement shall be set by the IRS at GSA.gov <https://www.gsa.gov/travel/plan-book/per-diem-rates>
- G. Commercial transportation shall reflect economy fares and shall be reimbursed only for the actual cost of the trip.
- H. Failure to provide original receipts or acceptable documentation will result in non-reimbursement (unless reasonable justification is provided.)

II. EXPENSE ALLOWANCE LIMITS

- A. Travel - Employees may choose their own mode of travel, but the reimbursement will be limited to the actual amount expended. Travel should be charged to a District P-card whenever possible.
 - 1. Maximum reimbursement is limited to the cost of direct coach airfare.

2. Complimentary hotel transportation service should be used whenever available. Claims for the actual cost of taxi, rental car and other forms of transportation related to the conference/convention activity may be made in addition to the round-trip airfare to the destination city.
- B. Group Rates – Employees are encouraged to use group travel and related accommodations to obtain lower costs. Statements for group accommodations from the sponsoring association or travel bureau are required. The statement must identify the items included in the package cost such as transportation, lodging, registration and number of days.
- C. Air Travel – Air travel must be purchased on District credit card or District check. Noncompliance may result in non-reimbursement of cost of coach fare.
- D. Auto Travel – Travel by personal car is permitted within certain restrictions.
1. Reimbursement for auto travel is limited to the cost of coach airfare and transportation to the site.
 2. Mileage reimbursement is at IRS current rate (I. (F) above) see GSA.gov link: <https://www.gsa.gov/travel/plan-book/per-diem-rates>
 3. If two or more employees travel together in one private vehicle, mileage reimbursement may only be claimed by only one person.
 4. Commuting expenses between the employee’s residence and primary work location are never reimbursable; however, reimbursement is allowed for expenses incurred in excess of ordinary commuting miles. The following are examples of reimbursable and non-reimbursable mileage:
 - a. Travel by staff to District business and related committee meetings is a reimbursable expense.
 - b. Travel for paid extra assignment is non-reimbursable. It is considered a separate job assignment; therefore, constitutes commuting miles.
- E. Lodging Expenses – Hotel or other lodging must be paid for with District credit card or District check. Noncompliance may result in non-reimbursement of cost of hotel or lodging expense.
- F. Meal Expenses - Per Diem allowance will be based on IRS guidelines. The reimbursement will be limited to the allowance for the number of days permitted for the trip. This will only be provided if the conference and/or hotel doesn’t include meals. This allowance includes any miscellaneous expense and any applicable tips; no additional claims for tips may be made.
- G. Registration Fees – If a separate registration fee is charged, it must be paid on District credit card or District check. Noncompliance may result in non-reimbursement of registration fees.

- H. Claims for Routine Expenditures - Personnel who are authorized to claim routine expenses throughout the year should accumulate several small expense items on a single employee's expense report and submit these for reimbursement at least semiannually.
- I. Mileage-Mileage reimbursement requests should be submitted monthly.

III. CHECK REQUESTS FOR TRAVEL AND MEETING ATTENDANCE

- A. Any District employee may have their expenses paid in advance for travel, lodging and registration fees. Airfare can be purchased through a travel agent and hotel accommodations can be reserved in advance. A confirmation of such arrangements must be requested as back up documentation. Written preapproval documentation is required. See attached "Superintendent GuidelinesOut-of-State Travel".
- B. Such expenses will be required on the Request for Check form. The administrator must approve the request before processing will be done by the Business Office.
- C. The following anticipated expenses must be itemized and a separate request for check form must be submitted separately for airfare and hotel accommodations: (Ref Superintendent Guidelines, Out-of-State Travel)
 - 1. Full name of organization sponsoring the conference;
 - 2. Location and dates of the meeting;
 - 3. Dates employee will be in attendance;
 - 4. Dollar amount of transportation, lodging and conference registration.
- D. If all information is not complete on the Request for Check form, it will be returned to the administrator who authorized the request. Written pre-approval documentation should accompany the Request for Check.
- E. Check requests are to be submitted to the Business Services Office not more than six (6) weeks or less than (3) weeks prior to commencement of the conference.

IV. EXPENSE REIMBURSEMENT

- A. Review and Approval – The administrator approving reimbursement is responsible for deciding upon the reasonableness and has the authority to disallow unreasonable or unnecessary expenses. The administrator also has the responsibility for determining the amount of time and the resulting expenses, which will be allowed for in transit travel within District policies. After review and approval, the administrator will send the expense report to the Business Services Office.
 - 1. Reimbursement claims may be submitted only for the actual amount of expense subject to the limitations as stated. All reimbursable expense will be reported on the Employee's Expense Report. Expenses must be

itemized and explained and written prior approval documentation attached.

2. Reimbursement for travel must be approved by the administrator who approved the travel. The report must identify the meeting or conference attended by full name and dates of the conference along with dates of attendance and written prior approval documentation attached (google sheet).
3. This report is to be submitted by the employee on completion of the travel to the administrator who authorized the trip within 14 days of close of the conference.
4. If money is due to the employee, an Employee Expense Report must be filled out and approved. These reimbursements will be deposited into the designated employee bank account.
5. A conflict of interest arises when a District employee is in a position to influence the business, research, or other decisions of the District in relationship to an outside organization in ways that could lead directly or indirectly to financial gain for the employee or the family of the employee, or give improper advantage to others to the detriment of the District.
6. The Employee's Expense Report will be audited in the Business Services Office. Claims which are not in accordance with policy, are not properly approved or are not supported by required receipts, and written prior approval documentation will be returned to the administrator who approved the report.
7. All purchases and expense reimbursements must be preapproved by a manager or supervisor. Only qualified staff, not parents nor volunteers, may purchase on behalf of the District, program, or department. Written prior approval documentation must be attached to the reimbursement request.
8. Items that are purchased online or by other method must be shipped to a District building address only.