

CSRM - JPA Conference and Travel Reimbursement Guidelines

Members of the Board of Directors shall be authorized to attend conferences/events pre-approved by the California Schools JPA for which the JPA shall provide reimbursement to the member district up to two thousand dollars (\$2000.00) for members in two programs or one thousand dollars (\$1000.00) for members in a single program per fiscal year. Board Members wishing to attend such functions pursuant to this policy shall notify the JPA in advance to verify funds available.

Reimbursement shall be actual and necessary expenses incurred for attending said event and fall under the policies of the JPA Administrative Agent.

Board Members may use the allotted funds on a single event or spread out to cover costs of various conferences throughout the fiscal year. When funds have been exhausted, the member district will be responsible for any costs beyond the allocated amount.

Members of the Executive Committee are recommended to attend the annual CAJPA conference in addition, they may choose to attend conferences such as PARMA, CASBO or conference that meets the requirements of their program participation. The JPA will cover full costs, make all arrangements for registration, accommodations and travel (when necessary based on the location of the conference). Members of the Executive Committee will be reimbursed for out of pocket expenses, following the Administrative Agent travel authorization/reimbursement policy.

Submission of Reimbursement Claims:

A CSRM Board Member Reimbursement Form will accompany all supporting documents, signed by the district CBO/CFO and submitted to the JPA Administrative Services Assistant at JPA Office for processing.

Expenses paid by the member district will be reimbursed directly to the member district.

Board Members cannot claim direct reimbursement if they are reimbursed for the same expenses by their member district or other entity.

Definitions

Documentation of Expenditures

The following are required to be submitted to document proof of all authorized travel expenditures:

- All expenditures (except mileage): Proof of payment for conference registration fees, airline fees, hotel folios, original itemized meal receipts, parking fees, taxi/ridesharing and rental cars.
- Conferences/events: flyers, agendas and completed registration forms showing payment.
- Meal Reimbursement Rate – Limited to \$60.00 per day per individual for all meals, with no single meal to exceed \$45.00. Gratuity is limited to 20% pretax amount.

Other forms of documentation may be required depending on the unique nature of the expenditure.

Reimbursement will normally be limited to:

- Conference/Seminar Registration fee
- Actual costs of coach airfare
- Transportation (i.e., taxi, ridesharing) – airport/hotel/airport or hotel/conference/hotel; during the trip, as appropriate
- Hotel accommodations – single rate only
- Meals – when not otherwise included or offered as part of the conference/event
- Incidental expenses with pre-approval

Special Note: The California Schools JPA (CSRM/CSEBA) in support of its Board members will provide assistance in making travel arrangement and covering conference costs on behalf of the members when the resources are unavailable or accessible to the Board member.