

General Information

GEAR UP-related travel must be approved in your annual Work Plan and Budget. In general, out-of-state travel is not allowable. However, the following exceptions may be requested:

1. GEAR UP West (typically held in October)
2. NCCEP - National Council for Community and Education Partnerships (typically held in July)
3. College visits to our bordering states of Idaho and Oregon

Additionally, WAGU-sponsored professional development will require travel. The funds in this line item are for these activities exclusively, and you may not reassign them to other activities. Unspent funds will remain with Washington State GU.

Traveling to GEAR UP Professional Development

Before each GU-sponsored professional development event, you will receive the information needed to make travel arrangements, including lodging reservation information, meals, and other guidance to prepare staff members. Please watch for these emails. The GU Advisor is responsible for ensuring all travelers understand the guidance. If an exception is needed, then you must submit a request in writing to Roxanne Encheff, roxannee@wsac.wa.gov, before the event for approval.

Travel Reimbursement Processes

To ensure reimbursement of GU-related travel expenses, review these critical items.

1. District employees must follow the district's rules and policies regarding travel allowances and reimbursement requirements. If your district reimburses less than WSAC allows, staff must be reimbursed at the district rate.
2. WSAC can only reimburse travel expenses up to the maximum allowed amount set by the Office of Financial Management (OFM). View a map of the current per diem rates at <https://gearup.wa.gov/file/washington-state-diem-rates>.

Process: Employees traveling on GU business will follow the district's policies and procedures for reimbursement. They will complete a travel or expense voucher documenting their travel expenses. This form will be submitted with the A19/EDF for reimbursement from WSAC.

Note:

- If your district reimburses travel expenses at a higher rate than the state per diem allowed, the district is responsible for reimbursing the employee the difference.
- All district employees need to claim travel expenses in the manner that their district requires while still providing WSAC with the necessary travel expense documentation required by the program for reimbursement.
- If the traveler uses a district credit card to pay any travel expenses, receipts for each expenditure are required for reimbursement.

- Travel or Expense Vouchers must include all information generally required for travel: the purpose of the travel, departure, and return times, and the names of the staff who received the meals. A signature is required.

Following the guidelines below ensures that your district will be reimbursed for all GU-related travel expenses.

Meals

Meal allowances (per diem) cover the following costs:

1. The cost of the meal.
2. Applicable sales tax.
3. Customary tip or gratuity (15-20%).

For example, if the dinner per diem is \$28, that includes the cost of food, sales tax, and tip.

Note: If a hotel provides a hot breakfast, the traveler is expected to not claim per diem for this meal; the per diem will not be reimbursed. However, if only a cold/continental breakfast is offered, the traveler is eligible for per diem.

Adult Meals – Field Trips

Meal allowances for staff members, bus drivers, or parent chaperones are reimbursable when attending and/or chaperoning a GU-sponsored field trip with students. The following guidelines apply to adult meals on field trips:

- The school district’s travel rules must always be followed.
- Adult meal allowances must adhere to one of the following methods:
 - If chaperones receive per diem for a meal, include their meals on a separate receipt. The adult completes a school district expense voucher, including departure and return times, and is reimbursed per the school district’s travel rules up to the state per diem.
 - The adult receives the same meal allowance as the students, which is \$15 per meal (\$20 in King County) and \$5 for a snack. Snack reimbursement for adults is optional. The adult must initial the Cash Meal Allowance Form for each meal allowance received.
 - The adult may opt to pay for their meals to conserve resources for the program. In this case, the school would not be reimbursed for these expenses.
 - If students and chaperones are receiving the cash meal allowance and are eating at a restaurant, college campus food service, or any other venue where the school is paying for all meals (in advance or at the time of purchase), you may include the adult meals on the receipt.

Professional Development and Other Staff Travel Meals

Meal allowances for staff members are reimbursable when attending a professional development workshop that requires an overnight stay. All meals will be reimbursed for overnight travel assignments at the rate in effect for the area where the traveler stops for sleep. The meal

reimbursement rate for the last day of travel (the return day) would continue to be the rate for the location where the traveler last stopped for sleep.

Attending a non-overnight professional development workshop or GU activity typically does not qualify the staff member for a meal allowance. For non-overnight travel assignments, staff must be in travel status for 11 hours or more, as documented on the traveler's expense voucher, to qualify for meal reimbursement.

Qualifying Meal Periods

Travelers must be in travel status during the entire WSAC-determined meal period(s) to qualify for meal reimbursements. WSAC has established the following meal periods:

- **Breakfast:** 6:30-7:30 am
- **Lunch:** 12-1 pm
- **Dinner:** 4:00-5:00 pm
- If you leave before the established meal period, you are entitled to that meal unless it is provided and if your school district allows that reimbursement. Staff members cannot extend travel to qualify for a meal.
- **Note:** Districts may have established meal periods that differ from the above. In this case, you must follow your district policy and practice.

Meal Receipts

- If you claim per diem (state or district allowance, whichever is less), **a meal receipt is not required – UNLESS your school district requires it.**
- If your district reimburses you based on the actual cost of the meal/receipt, not to exceed the state per diem, then WSAC requires a legible copy of your receipt.
 - WSAC requires that all meal receipts be detailed and legible. Credit card receipts are not detailed and, therefore, are not acceptable documentation forms. Receipts must show what was purchased.
 - When submitting meal receipts, if you are paying for your meal and another individual's meal, both parties must sign the receipt.
- Meal receipts should be reasonable; if one person's meal is on the ticket, one meal is expected to be purchased. If you are eating with a non-GU person (for example, a spouse), do not include that person's meal on your receipt.
- Alcohol is not an allowable expense and must not be included in any submitted receipt.

NOTE

- Staff members will not be reimbursed for meals if a meal was provided at the event. The only exception to this is if a continental breakfast is provided and only cold items are served; then you may request reimbursement for breakfast. If a hotel offers a hot breakfast as part of your stay, it is considered a provided meal and will not be reimbursed.
- WSAC will only pay for the approved traveling staff member's meal expenses even if combined meal costs for one authorized traveler plus companion(s) do not exceed the allowed maximum amount.
- Incidentals, such as coffee, snacks, frozen yogurt, ice cream, or dessert purchased separately from a meal, are not reimbursable.

Transportation

Privately Owned Vehicle (POV) Mileage Rate

WSAC can reimburse for mileage when using a district or personal vehicle up to the allowed maximum amount set by OFM, which is updated every January 1st on the per diem map.

If your district reimburses at a lower rate, that is what will be reimbursed, and you should request this from WSAC. If the amount per mile increases or decreases, WSAC will notify the school districts regarding the change.

Carpooling

Staff members are expected to carpool to GU events. Up to two cars can be transported to GU events per event. Exceptions to this require pre-approval from the WSAC Director.

School District Vehicles

WSAC can reimburse for using other district vehicles (SUV, van, or bus) up to the allowed maximum amount set by the school district but requires written verification of the cost per mile claimed by the school district. WSAC may not be charged more than other programs in the district.

Driver Costs – Field Trips

When a district vehicle, such as a bus, is used for transportation, WSAC will reimburse driver time, benefits, and mileage. Written verification of these expenses, such as a transportation log or invoice, is required.

Tolls

WSAC will reimburse bridge and ferry tolls with detailed receipt(s). However, High Occupancy Toll (HOT) lanes will not be reimbursed.

Rental Cars

WSAC will not reimburse for the use of a rental car except in rare instances. The Director must pre-approve All rental vehicles before the funds are spent.

Taxis or Shuttles

WSAC will reimburse taxi or shuttle expenses, including Uber and Lyft, to and from the airport/hotel while traveling for GU.

Taxis, trolleys, or buses taken by staff members for other reasons while attending a conference are considered personal expenses and are not allowable. Limousines or other options will not be reimbursed.

Lodging

- Lodging arrangements will be provided for GU professional development events. It is the district's responsibility to ensure that reservations are made using the GU link or code for these events.
- WSAC can reimburse lodging up to the maximum allowed amount set by OFM.

- Taxes and fees associated are not included in the OFM lodging rates and, therefore, are reimbursed in addition to the room rate.
- Internet access is not an allowable expense, as free Wi-Fi is usually available in the hotel lobby or public spaces.
- If you have a personal guest staying with you and that guest has an additional charge, you are responsible for paying that charge. WSAC will not reimburse additional non-GU staff costs.
- If lodging exceeding the set OFM amount is required, then GU must first obtain pre-approval. For example:
 - If a conference is held at a hotel that charges over per diem, the costs may be reimbursed to the district only if pre-approval is given. This may be allowed when staying at a separate venue requires additional transportation expenses that would result in higher costs than staying at the conference venue. The traveler must select the most economical room available if approval is given.
 - Under no circumstances will approval be given for lodging that exceeds 150% of per diem.
 - Hotel confirmation is not an acceptable form of backup documentation.

Parking

- If parking at a hotel for an event, parking included on the lodging receipt will be reimbursed.
- WSAC will reimburse for other offsite parking.
- WSAC will not reimburse for valet parking. If you opt to use valet parking, you will only be reimbursed the standard rate. However, if self-parking is not an option at the hotel, valet parking will be reimbursed.
- If a GU rate is available, parking will only be reimbursed up to that amount.

Airfare

Staff may travel by air (economy class), and a detailed receipt showing all costs is required for reimbursement from WSAC. WSAC recommends booking directly with the airline rather than using a travel agency or service. Airline confirmations are not considered acceptable forms of backup documentation.

- **Baggage Fees:** WSAC will reimburse for up to one checked bag each way.
- **Unallowable Costs:**
 - Charges for changing a flight reservation.
 - Early check-in fees.
 - Flight insurance.
 - Convenience fees.
 - Fees for using a travel agency or service.
 - First class or other upgrades.

Advance Travel

- WSAC cannot reimburse for advance travel. Travel expenses will only be reimbursed once the travel is completed.
- WSAC cannot reimburse a school district more than what a school district reimbursed the employee for. Only completed travel expense vouchers with proper backup documentation will be reimbursed.

Travel Expense Voucher and Documenting Travel

- WSAC requires school district travel expense vouchers with receipts as backup documentation.
- The travel expense voucher must include the purpose of the trip, the location, dates of travel, and departure and return times.
- **Departure and return times must be provided on the travel expense voucher, even if the school district form does not require them.**
 - Departure and return times are used to determine eligibility for meal reimbursement, and without them, we cannot reimburse for meals.
 - Your **departure time** is recorded when you leave your home or workplace on the first day of the trip, whichever is later. If you did not go to your place of work on that day, use the time you left your home.
 - Your **return time** is when you arrive back at your home or place of work on the final day of travel, whichever is earlier. If you do not return to your place of work on that day, use the time you arrived at your home.
- The following items must also be included if reimbursement for the item is requested:
 - **Mileage:** How many miles and how much per mile are being claimed from destination to destination?
 - **Meals:** How much is claimed for each meal (breakfast, lunch, and dinner) on each travel day(s)?
 - **Lodging:** How much is being claimed for lodging each night? A detailed receipt is required.
 - **Miscellaneous Expenses (Tolls, parking, baggage, etc.):** Detailed receipts are required.
- Provide copies of all detailed receipts/invoices for travel expenses requested for reimbursement.
- Summary credit card receipts that do not detail what was purchased and statements or bank statements are unacceptable forms of backup documentation.
- Travel expense vouchers must include the employee's signature and a school district approval signature. Vouchers that do not reflect both signatures will be considered incomplete and will not be processed for reimbursement.
- The transaction recap report (showing that reimbursement) is required. It must show who was paid and the amount paid, and it must reflect a check date and number so that GU can reimburse the expense.

Out-of-State Travel

- WSAC rarely approves out-of-state travel. The exceptions are the GU-NCCEP national conference, GEAR UP West, and AVID Summer Institute (except when offered in WA).
- Travel to Oregon and Idaho may be allowable if the trips are approved and in your Work Plan and Budget.
 - When planning out-of-state travel, it is essential to understand the difference between GSA (federal) and OFM (state) per diem rates for meals. Federal GSA per diem rates are available at bit.ly/GSA-pd. When traveling out of state, look up the federal rate for your destination. Next, take the daily per diem rate for the destination and translate it to the OFM rate per meal, as listed on the state per diem map, which can be found at <https://gearup.wa.gov/file/washington-state-diem-rates>.
 - For example, The GSA per diem meal rate for San Francisco, California, is \$92 daily.

Question: How much will I receive per meal in San Francisco, California?

Answer: The OFM per diem map shows that the daily per diem is \$92. Therefore, staff members would receive \$24 for breakfast, \$27 for lunch, and \$41 for dinner.

If you have questions about the reimbursement process, contact Roxanne Encheff roxannee@wsac.wa.gov, or (360) 485-1205.