

## GENERAL INFORMATION

WSAC must approve GEAR UP-related travel in the annual work plan and budget. In general, out-of-state travel is not allowable. However, the following exceptions may be requested:

1. AVID Summer Institute – See specific guidance if you opt to attend an out-of-state session.
2. GEAR UP West
3. National Council for Community and Education Partnerships (NCCEP)
4. College visits to bordering states, Idaho and Oregon

The annual work plan and budget will include a line item specific to Washington State GEAR UP-sponsored professional development. Including the following:

1. GEAR UP West
2. Winter Workshop
3. Spring Workshop
4. Summer Workshop

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 GEAR UP.

## TRAVELING TO GEAR UP EVENTS

Before each GEAR UP-sponsored professional development event, WSAC staff will send the information needed to travel arrangements, including lodging reservation information, meals, and any other guidance to prepare staff members. Please watch for these emails. It is the GEAR UP Coordinator's or Director's responsibility to ensure all travelers understand the guidance. If an exception is needed, then you must submit a request in writing to Buffy Hatcher, [buffyh@wsac.wa.gov](mailto:buffyh@wsac.wa.gov), before the event for approval.

## TRAVEL REIMBURSEMENT PROCESSES

To ensure reimbursement of GEAR UP-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 for 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: <https://gearup.wa.gov/file/washington-state-diem-rates>.

If your district reimburses travel expenses at a higher rate than the state per diem allowed, the district is responsible for reimbursing the employee at their expense. WSAC will only reimburse per the guidance below and never above the state per diem rates. 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. Staff members will submit a travel expense voucher and documentation to their school district to be reimbursed for travel expenses.

If you use a district credit card to pay travel expenses for any employee, then you must submit the receipts and an authorization form (sometimes called a p-card authorization). You 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, and their signature is required.

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

## MEALS

### Meal allowances (per diem) cover the following costs:

1. The basic cost of the meal
2. Any applicable sales tax
3. Any customary tip or gratuity

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

**Note: If a hotel provides a hot breakfast, it is expected that the traveler will not claim per diem for this meal; the per diem will not be reimbursed.**

## ADULT MEALS – FIELD TRIPS

Meal allowances for staff members, bus drivers, or parent chaperones are reimbursable when attending and/or chaperoning a GEAR UP-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 follow one of the following methods:
  - If chaperones receive per diem for a meal, you should include their meals on a separate receipt and complete a travel form. 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. The snack reimbursement for the adult is optional. The adult must initial the Student Cash Meal Allowance Form for each meal allowance received.
  - The adult may opt to pay for their own 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 (\$15/20/5) 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. For overnight travel assignments, all meals will be reimbursed 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 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 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:** 4:30-5:30 pm
- If you leave prior to the established meal period, then you are entitled to that meal unless it is provided and as long as your school district allows for 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 the district policy and practice.

## DEPARTURE AND RETURN TIMES

- Per state rules, travel expense vouchers must include departure and return times for all trips.
- 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 left either your home or place of work on the first day of the trip, whichever is later. If you did not go to your place of work on that day, then 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, then use the time you arrived at your home.
- If you do not provide departure and return on either the travel expense voucher or the Expenditure Detail Form, your district will not be reimbursed for any claimed meals.

## 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 copy of your receipt.
  - WSAC requires that all meal receipts be detailed. Credit card receipts are not detailed and therefore are not an acceptable form of documentation. 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, it is expected that one meal is purchased. If you are eating with a non-GEAR UP 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 on any receipt submitted.

## NOTE

- Staff members would 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 were served, then you may request reimbursement for breakfast. If a hotel offers a hot breakfast as a 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 or ice cream, dessert purchased separately from a meal are not reimbursable.

## TRANSPORTATION

### PRIVATELY OWNED VEHICLE (POV) MILEAGE RATE

WSAC can reimburse for using a district or personal vehicle up to the allowed maximum amount set by OFM, which is updated every January 1.

If your district reimburses at a lower rate, that is what will be reimbursed and should be requested 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 GEAR UP events. Transportation to GEAR UP events will be allowed up to two cars per event. Exceptions to this require pre-approval from the WSAC Director.

## SCHOOL DISTRICT VEHICLES

WSAC can reimburse for the use of 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 what other programs in the district are charged.

## DRIVER COSTS – FIELD TRIPS

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

## TOLLS

WSAC will reimburse for bridge and ferry tolls and require a detailed receipt(s). 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. All rental vehicles must be pre-approved by the Director and before the funds being spent.

## TAXIS OR SHUTTLES

WSAC will reimburse taxi or shuttle expenses, including Uber and Lyft, to and from the airport while traveling for GEAR UP. A detailed receipt is required.

Taxis, trolleys, or buses that are 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

- WSAC can reimburse for 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 there is an additional charge for that guest, you are responsible for paying that charge. WSAC will not reimburse additional non-GEAR UP staff costs.
- If lodging is required that exceeds the set OFM amount, then pre-approval must first be obtained by GEAR UP.  
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 the cost of staying at a separate venue requires additional transportation expenses that would result in higher costs than staying at the conference venue. If approval is given, the traveler must select the most economical room available under the circumstances.
  - Under no circumstances will approval be given for lodging that exceeds 150% of per diem.
  - A detailed invoice is required for all lodging expenses. The invoice must show the cost of the room, as well as the taxes and fees. 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, and a detailed parking receipt is required.
- WSAC will not reimburse for valet parking. If you opt to use valet parking, only the standard rate will be reimbursed. However, if self-parking is not an available option at the hotel, valet parking will be reimbursed.
- If a GEAR UP 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/service. If you book online, a copy of the actual invoice or receipt must be provided. Airline confirmations are not considered acceptable forms of backup documentation.

- **Baggage Fees:** WSAC will reimburse for up to one checked bag each way. A detailed receipt showing the expense is required.
- **Unallowable Costs:**
  - Charges for changing a flight reservation.
  - Early check-in fees.
  - Flight insurance.
  - Convenience fees.
  - 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, nor can WSAC reimburse more than what the amount of the receipt reflects. 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. If your district does not have a travel expense voucher form, you may use GEAR UP's Travel Expense Voucher at <https://gearup.wa.gov/file/form-gear-travel-expense-report>.
- 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 may be included on the Expenditure Detail Form instead of the travel expense voucher.
- 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 being claimed for each meal (breakfast, lunch, and dinner) on each travel day(s)?
  - **Lodging:** How much for each night is being claimed for lodging? A detailed receipt is required.
  - **Miscellaneous Expenses (Tolls, parking, and baggage, etc.):** Detailed receipts are required.
- Provide copies of all detailed receipts/invoices for travel expenses being requested for reimbursement.

- Summary credit card receipts that do not detail what was purchased and statements or bank statements are not acceptable forms of backup documentation.
- Travel expense vouchers must include the employee's signature, as well as a school district approval signature. Travel expense 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. The transaction recap report must reflect a check date and a check number in order for GEAR UP to reimburse the expense.

## OUT OF STATE TRAVEL

- Out-of-state travel is rarely approved by WSAC. The exceptions to this are the GEAR UP-NCCEP national conferences, AVID Summer Institute, and GEAR UP West.
- Travel to Oregon and Idaho may be allowable if the trips are approved by and in your work plan and budget.
- When planning out-of-state travel, it is important to understand the difference between GSA (federal) and OFM (state) per diem rates for meals. Federal GSA per diem rates are available at <https://www.gsa.gov/portal/content/104877>.
  - When traveling out of state, look up the federal rate of 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 \$74 per day.

**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 \$79. Therefore, staff members would receive \$20 for breakfast, \$24 for lunch, and \$35 for dinner.

## QUESTIONS

If you have questions about the reimbursement process, please contact Buffy Hatcher, [buffyh@wsac.wa.gov](mailto:buffyh@wsac.wa.gov), or 360-485-1067.