Agenda of Travel Ad Hoc Committee

The Board of Trustees
Montgomery County IU

A Travel Ad Hoc Committee of the Board of Trustees of Montgomery County IU will be held Thursday, October 8, 2026, beginning at 6:00 PM Virtual via Zoom.

1. **Meeting Opening**
   1.a. Call to Order
   1.b. Roll Call
   Description:
   The members of the Travel Ad Hoc Committee
   Greg D'Elia (Upper Moreland) - Chair
   Robert Liggett (Perkiomen Valley)
   Christine Coyne (North Penn)
   Sandy Edling (MCIU Administrative Liaison)
2. **Announcements**
   2.a. Recording of Meeting
3. **Discussion**
4. **Persons Desiring to Be Heard**
5. **Adjournment**

BOARD POLICY

626.1 Travel Reimbursement - Federal Programs

POLICY NUMBER	ADOPTED	REVISED	VERSION
626.1	6/22/2016	11/19/2025	v2
DOCUMENT STATUS	**PRINTED**		
UNDER-REVIEW	9/25/2026		

Authority

The Board shall reimburse administrative, professional and support employees, school officials, and participants in federal awards for travel costs incurred in the course of performing services related to official business as a federal grant recipient.[1] [2] **[3]**

Definitions

A participant is generally an individual participating in or attending activities under a federal award such as training or conferences, but who is not responsible for implementation of the federal award. Participants can include, but are not limited to, community members, students and conference attendees.**[4]**

For purposes of this policy, **travel costs** shall mean the expenses for transportation, airfare, lodging, subsistence, and related items incurred by individuals who are traveling on approved official business as a federal grant recipient.**[3]**

Delegation of Responsibility

School officials**,** Intermediate Unit employees and participants shall comply with applicable Board policies and administrative regulations established for reimbursement of travel and other expenses. **[5]** **[6]**

The validity of payments for travel costs for all Intermediate Unit employees and school officials shall be determined by the Director of Business Services.

Guidelines

Reimbursement for travel costs related to official business as a federal grant recipient must be consistent with standard methods established in general travel reimbursement policies and administrative regulations. [3] **[5]** **[6]**

Travel costs shall be reimbursed on a mileage basis for travel using a personal vehicle and on an actual cost basis for meals, lodging and other allowable expenses, consistent with those normally allowed in like circumstances in the Intermediate Unit's nonfederally funded activities, and in accordance with the Intermediate Unit's travel reimbursement policies and administrative regulations.[3] [5] [6]

Mileage reimbursements shall be at the rate approved by the Board for other Intermediate Unit travel reimbursements. Actual costs for meals, lodging and other allowable expenses shall be reimbursed only to the extent they are reasonable and do not exceed the per diem limits established by the federal General Services Administration for federal employees for locale where incurred.

All travel costs must be presented with an itemized, verified statement prior to reimbursement.[1] [2]

In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that:[3] [5] [6]

1. Participation of the individual is necessary to the federal award.
2. The costs are reasonable and consistent with the Intermediate Unit's established policy.

Legal Footnotes

[1] 24 P.S. 516.1
LEGAL REFERENCE

[2] 24 P.S. 517
LEGAL REFERENCE

[3] 2 CFR 200.475
LEGAL REFERENCE

[4] 2 CFR 200.1
LEGAL REFERENCE

[5] Pol. 004 — Membership
POLICY REFERENCE

[6] Pol. 331 — Job Related Expenses
POLICY REFERENCE

BOARD POLICY

331 Job Related Expenses

POLICY NUMBER	ADOPTED	REVISED	VERSION
331	5/26/2010	2/25/2026	v2
DOCUMENT STATUS	**PRINTED**		
UNDER-REVIEW	9/25/2026		

Authority

The Board shall reimburse employees for appropriate expenses incurred in the course of employment. Expenses will normally occur while an employee is away from his/her workstation. Reimbursement may include travel expenses, the cost of lodging and food, and other actual and necessary costs associated with performing Intermediate Unit business. [1]

Definition

A **workstation** is a location in which an administrator, supervisor, project staff member, itinerant staff member or other employee has an established office that is considered the employee's primary location. A workstation can be the main MCIU office, a school, or any other facility or location operated by the Intermediate Unit. Each employee has a workstation. Employees cannot be reimbursed for mileage to and from their workstation for normal daily work. Unless otherwise agreed to, employees, including itinerant employees, will be reimbursed for employment-related mileage incurred after reaching the first worksite on any given day.

Delegation of Responsibility

It shall be the responsibility of the direct supervisor and the Office Director to determine that all requests for expenses and other reimbursements are reasonable and legitimate.

The Executive Director or designee shall develop procedures for reimbursement of job related expenses, including travel expenses, which shall require employees to provide adequate documentation of expenses.

Guidelines

Requests for employee travel will be considered in terms of the value to the employee's professional development and/or the Intermediate Unit program. Conference attendance may be limited by fiscal constraints.

Attendance at approved events outside the Intermediate Unit shall be without loss of regular pay, unless otherwise stipulated prior to attendance.

Under normal conditions, employees traveling on official business shall provide themselves with sufficient funds for ordinary expenses.

Travel shall be the most direct and economical route.

Authorization for Travel

Actual and necessary expenses incurred when attending functions outside the Intermediate Unit shall be reimbursed to an employee if approval has been obtained in advance from the program supervisor, office director, and the Executive Director or designee. Overnight travel, except that which is part of a routine job assignment, must be preapproved by the direct supervisor, office director, and Executive Director or designee. If total expenses are expected to exceed the amount designated in the Intermediate Unit budget, preapproval by the Board is required.

Personal Automobiles

Employees will be reimbursed for personal automobile use that is necessary in the performance of their jobs. The per mile rate for reimbursement will be consistent with the rate published by the IRS at the time of travel.

Incidental expenses incurred when traveling by automobile, including parking fees and tolls, are reimbursable and must be supported by detailed receipts.

Travel reimbursement for staff will begin after the employee has reached his/her workstation or his/her first assignment of each day, and shall end at the last assignment of the day. Mileage costs will not be reimbursed to or from the staff member's workstation and place of residence.

Employees working on special assignments, whose first and last work site is farther from the employee's home than their assigned workstation, are eligible to receive reimbursement for the difference in mileage between the first and last work site and the assigned workstation with the prior approval of their supervisor.

Lodging

Expenses for lodging must be consistent with the rates charged in the area in which the accommodation is located and must be supported by detailed receipts. Normally, reimbursement will not be paid for lodging within fifty (50) miles of an employee's workstation. Exceptions may be granted when the nature of the work, meeting or conference involves early morning or late evening activities of a professional nature.

Meals

Meals purchased while on Intermediate Unit business away from the workstation or worksite are reimbursable only when attending an approved conference or professional development opportunity. The cost of meals must be consistent with normal costs in the area in which meals are purchased and limited to the per diem limits established by the federal General Services Administration for the locale where incurred. Meal purchases should be supported by itemized receipts. The purchase of alcoholic beverages is not reimbursable.

Actual Expenditures

Reimbursement, other than mileage, will be made only for actual expenditures. This policy does not provide for or authorize per diem travel expense payments.

Completion of Travel Expense Voucher

In all instances of travel and job related expense reimbursements, full itemization with receipts attached shall be required, and shall be submitted on a monthly basis. All reimbursement requests for a given fiscal year must be submitted no later than July 31st of that year. Vouchers submitted August 1 or after for expenses incurred in any preceding fiscal year will not be reimbursed.

Legal Footnotes

[1] **24 P.S. 517**
LEGAL REFERENCE

Lincoln Intermediate Unit 12
— An Educational Service Agency —

BOARD POLICY

331 Job Related Expenses

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
331	6/28/2016	v1	ACTIVE

PRINTED
9/25/2026

Authority

Payment of the actual and necessary expenses, including travel expenses, of any Intermediate Unit employee that are incurred in the course of performing services for the Intermediate Unit shall be reimbursed in accordance with Board policy.[1]

Delegation of Responsibility

Exceptions to this policy may be made by the Executive Director upon the recommendation of the Division Administrator.

Regulations applying to the job related expenses of itinerant staff members shall be developed by the Executive Director.

Guidelines

This policy shall apply to all employees of the Intermediate Unit:

1. Staff members whose employment requires travel by personal vehicle shall be compensated at the maximum rate allowed by the IRS. Staff members shall claim all miles driven on the job minus the number of miles driven on a road trip from the employee's home to the first assigned stop.

2. Employees shall be eligible to be compensated for use of their personal vehicles at the appropriate rate in effect for attendance at workshops, meetings and other forms of inservice training conferences when such attendance is required by the employer, Lincoln Intermediate Unit, and/or when such attendance is given prior approval by the Executive Director and Board. Compensation shall be paid for all approved travel in excess of the employee's normal daily commuting.

3. Schedules shall be arranged to minimize travel expenses to the extent consistent with provision of sound educational services.

4. When two (2) or more Intermediate Unit employees ride in the same vehicle, only one (1) shall be compensated for mileage.

5. Upon recommendation of the Executive Director, the Board may provide a vehicle for use by Intermediate Unit employees as authorized by the appropriate Division Administrator.

6. In all instances of travel and job related expense reimbursement, full itemization with receipts attached shall be required, and shall be submitted on the form and in the manner and timing designated by the Intermediate Unit.

7. Other expenses incurred by employees in the performance of assigned duties will be reimbursed in accordance with established administrative regulations and provisions of the administrative compensation plan or applicable collective bargaining agreement.

8. Reimbursement for the purchase of alcoholic beverages is prohibited.

9. Reimbursement for the purchase of gifts is prohibited.

Travel Reimbursement - Federal Programs

1. The Board shall reimburse administrative, professional and support employees, and LIU officials, for travel costs incurred in the course of performing services related to official business as a federal grant recipient.[1][2][3]

2. For purposes of this policy, **travel costs** shall mean the expenses for transportation, lodging, subsistence, and related items incurred by employees and IU officials who are in travel status on official business as a federal grant recipient.[3]

3. LIU officials and employees shall comply with applicable Board policies and administrative regulations established for reimbursement of travel and other expenses. The validity of payments for travel costs for all LIU employees and officials shall be determined by the Executive Director or designee, Business Services, and Federal Program Coordinators. **[4] [5]**

4. Travel costs shall be reimbursed on a mileage basis for travel using an employee's personal vehicle and on an actual cost basis for meals, lodging and other allowable expenses, consistent with those normally allowed in like circumstances in the organization's non-federally funded activities, and in accordance with the organization's travel reimbursement policies and administrative regulations.[3] **[4]** **[5]**

   Mileage reimbursements shall be at the rate approved by the Board for other LIU travel reimbursements. Actual costs for meals, lodging, and other allowable expenses shall be reimbursed only to the extent they are reasonable and do not exceed the per diem limits established by the Board and/or the federal General Services Administration for federal employees for locale where incurred.

   All travel costs must be presented with an itemized, verified statement prior to reimbursement. [1][2]

   In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that:[3] **[4]** **[5]**

   a. Participation of the individual is necessary to the federal award; and

   b. The costs are reasonable and consistent with the organization's established policy.

Legal Footnotes

[1] **24 P.S. 517**
LEGAL REFERENCE

[2] **24 P.S. 516.1**
LEGAL REFERENCE

[3] **2 CFR 200.474**
LEGAL REFERENCE

[4] **Pol. 004**
POLICY REFERENCE

[5] **Pol. 331**
POLICY REFERENCE

Lincoln Intermediate Unit 12
— An Educational Service Agency —

BOARD POLICY

626.1 Travel Reimbursement - Federal Programs

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
626.1	8/3/2021	v1	ACTIVE

PRINTED
9/25/2026

Authority

The Board shall reimburse administrative, professional and support employees for travel costs incurred in the course of performing services related to official business as a federal grant recipient. [1][2][3]

Definition

For purposes of this policy, **travel costs** shall mean the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business as a federal grant recipient.[1]

Delegation of Responsibility

Lincoln Intermediate Unit employees shall comply with applicable Board policies and administrative regulations established for reimbursement of travel and other expenses. [4]

The validity of payments for travel costs for all Intermediate Unit employees shall be determined by the Director of Finance or designee.

Guidelines

Travel costs shall be reimbursed on a mileage basis for travel using an employee's personal vehicle and on an actual cost basis for meals, lodging and other allowable expenses, consistent with those normally allowed in like circumstances in the Intermediate Unit's nonfederally funded activities, and in accordance with the Intermediate Unit's travel reimbursement policies and administrative regulations.[1] **[4]**

Mileage reimbursements shall be at the rate approved by the Board for other Intermediate Unit travel reimbursements. Actual costs for meals, lodging and other allowable expenses shall be reimbursed only to the extent they are reasonable and do not exceed the per diem limits established by the Board.

All travel costs must be presented with an itemized, verified statement prior to reimbursement.[2] [3]

In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that:[1] **[4]**

1. Participation of the individual is necessary to the federal award.
2. The costs are reasonable and consistent with the Intermediate Unit's established policy.

Legal Footnotes

[1] **2 CFR 200.474**
LEGAL REFERENCE

[2] **24 P.S. 516.1**
LEGAL REFERENCE

[3] **24 P.S. 517**
LEGAL REFERENCE

[4] **Pol. 331**
POLICY REFERENCE

Berks County Intermediate Unit
an educational service agency

BOARD POLICY

331 Job Related Expenses

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
331	6/23/1994	v1	ACTIVE

PRINTED
9/25/2026

Purpose

Payment of the actual and necessary expenses, including traveling expenses, of any administrator of the Intermediate Unit that are incurred in the course of performing services for the Intermediate Unit, shall be reimbursed in accordance with this policy.

Guidelines

The Board shall reimburse administrative personnel for expenses incurred in carrying out an assignment at a destination other than their designated office.

It shall be the responsibility of the Executive Director to determine that all requests for trips, etc., and reimbursement of expenses are reasonable and legitimate.

Berks County Intermediate Unit
an educational service agency

BOARD POLICY

626.1 Travel Reimbursement - Federal Programs

POLICY NUMBER	ADOPTED	REVISED	VERSION
626.1	6/16/2016	11/20/2025	v1
DOCUMENT STATUS	**PRINTED**		
ACTIVE	9/25/2026		

Authority

The Board shall reimburse administrative, professional, and support employees, school officials, and participants in federal awards for travel costs incurred in the course of performing services related to official business as a federal grant recipient.[1][2][3]

Definitions

A **participant** is generally an individual participating in or attending activities under a federal award, such as training or conferences, but who is not responsible for the implementation of the federal award. Participants can include, but are not limited to, community members, students, and conference attendees.[4]

For purposes of this policy, **travel costs** shall mean the expenses for transportation, airfare, lodging, subsistence, and related items incurred by individuals traveling on approved official business as a federal grant recipient.[3]

Delegation of Responsibility

School officials, Intermediate Unit employees, and participants shall comply with applicable Board policies and administrative regulations established for reimbursement of travel and other expenses. [5] [6] [7] [8]

School officials and Intermediate Unit employees shall acquire prior written approval to incur travel costs for official business related to a federal award.[3]

The validity of payments for travel costs shall be determined by the Chief Financial Officer.

Guidelines

Reimbursement for travel costs related to official business as a federal grant recipient must be consistent with standard methods established in general travel reimbursement policies and administrative regulations.[3] **[5] [6] [7] [8]**

Travel costs shall be reimbursed on a mileage basis for travel using a personal vehicle and on an actual cost basis for meals, lodging, and other allowable expenses, consistent with those normally allowed in like circumstances in the Intermediate Unit's non-federally funded activities, and in accordance with the Intermediate Unit's travel reimbursement policies and administrative regulations.[3] **[5] [6] [7] [8]**

Mileage reimbursements shall be at the rate approved by the Board for other Intermediate Unit travel reimbursements. Actual costs for meals, lodging, and other allowable expenses shall be reimbursed to the extent they are reasonable and do not exceed the per diem limits established by the federal General Services Administration for federal employees for the locale where incurred.

All travel costs must be presented with an itemized, verified statement prior to reimbursement.[1] [2]

In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that:[3] **[5] [6] [7] [8]**

1. Participation of the individual is necessary for the federal award.
2. The costs are reasonable and consistent with the Intermediate Unit's established policy.

Legal Footnotes

[1] **24 P.S. 516.1**
LEGAL REFERENCE

[2] **24 P.S. 517**
LEGAL REFERENCE

[3] **2 CFR 200.475**
LEGAL REFERENCE

[4] **2 CFR 200.1**
LEGAL REFERENCE

[5] **Pol. 004**
POLICY REFERENCE

[6] **Pol. 331**
POLICY REFERENCE

[7] **Pol. 431**
POLICY REFERENCE

[8] **Pol. 531**
POLICY REFERENCE

Bucks County Intermediate Unit

BOARD POLICY

3210 Conferences, Seminars, Meetings Attendance

POLICY NUMBER	ADOPTED	REVISED	VERSION
3210	7/20/1976	11/19/1991	v1

DOCUMENT STATUS	PRINTED
ACTIVE	9/25/2026

The Bucks County Intermediate Unit Board encourages employees to attend educational conferences, seminars and meetings, with authorization, subject to the degree to which the conference is of direct value to the Bucks County Schools community and the availability of funds.

Bucks County Intermediate Unit

BOARD POLICY

3315 Travel and Expenses

POLICY NUMBER	ADOPTED	REVISED	VERSION
3315	7/20/1976	11/19/1991	v1

DOCUMENT STATUS	PRINTED
ACTIVE	9/25/2026

The Executive Director, with the approval of the Board, shall be responsible for the establishment of reimbursement guidelines for travel and expense for administrative, supervisory, and consultative employees in the performance of duties.

Capital Area Intermediate Unit

BOARD POLICY

626.1 Travel Reimbursement - Federal Programs

POLICY NUMBER	ADOPTED	REVISED	VERSION
626.1	7/28/2016	9/25/2025	v1
DOCUMENT STATUS	**PRINTED**		
ACTIVE	9/25/2026		

Authority

The Board shall reimburse administrative, professional and support employees, school officials, and participants in federal awards for travel costs incurred in the course of performing services related to official business as a federal grant recipient.[1][2][3]

Definitions

A **participant** is generally an individual participating in or attending activities under a federal award such as training or conferences, but who is not responsible for implementation of the federal award. Participants can include, but are not limited to, community members, students and conference attendees.[4]

For purposes of this policy, **travel costs** shall mean the expenses for transportation, airfare, lodging, subsistence, and related items incurred by individuals who are traveling on approved official business as a federal grant recipient.[3]

Delegation of Responsibility

Intermediate Unit employees and participants shall comply with applicable Board policies and administrative regulations established for reimbursement of travel and other expenses. [5] [6]

The validity of payments for travel costs shall be determined by the Executive Director or designee.

Guidelines

Reimbursement for travel costs related to official business as a federal grant recipient must be consistent with standard methods established in general travel reimbursement policies and administrative regulations.[3] [5] [6]

Travel costs shall be reimbursed on a mileage basis for travel using an employee's personal vehicle and on an actual cost basis for meals, lodging and other allowable expenses, consistent with those normally allowed in like circumstances in the Intermediate Unit's non-federally funded activities, and in accordance with the Intermediate Unit's travel reimbursement policies and administrative regulations.[3] [5] [6]

Mileage reimbursements shall be at the rate approved by the Board for other Intermediate Unit travel reimbursements. Actual costs for meals, lodging and other allowable expenses shall be reimbursed only to the extent they are reasonable and do not exceed the per diem limits established by the Board.

All travel costs must be presented with an itemized, verified statement prior to reimbursement.[1] [2]

In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that:[3] [5] [6]

1. Participation of the individual is necessary to the federal award.
2. The costs are reasonable and consistent with the Intermediate Unit's established policy.

Legal Footnotes

[1] 24 P.S. 516.1
LEGAL REFERENCE

[2] 24 P.S. 517
LEGAL REFERENCE

[3] 2 CFR 200.475
LEGAL REFERENCE

[4] 2 CFR 200.1
LEGAL REFERENCE

[5] Pol. 004
POLICY REFERENCE

[6] Pol. 331
POLICY REFERENCE

Capital Area Intermediate Unit

BOARD POLICY

331 Job Related Expenses

POLICY NUMBER	ADOPTED	REVISED	VERSION
331	12/15/1988	6/26/2025	v1
DOCUMENT STATUS	**PRINTED**		
ACTIVE	9/25/2026		

Authority

Payment and reimbursement of job-related expenses, including travel expenses, incurred by administrative, professional and support employees in the course of performing services for the Intermediate Unit and expenses incurred by related programs administered by the Intermediate Unit on behalf of the Pennsylvania Department of Education and other organizations, shall be reimbursed in accordance with Board policy.[1]

Delegation of Responsibility

Each supervisor is authorized to approve job-related expenses, including travel expenses, for their employees and related programs administered by their team. The Executive Director is authorized to approve exceptions to the Board policy that they deem necessary and appropriate for the effective and efficient operation of the Intermediate Unit.

Guidelines

Intermediate Unit employees and related programs administered by the Intermediate Unit shall be entitled to payment and reimbursement of expenses, including travel expenses, incurred in the performance of their duties or program activities.[1]

Requests for reimbursement of job related and program related expenses shall be submitted through the online platform and in the manner and timing designated by the Intermediate Unit.

Out-of-state travel on behalf of the Intermediate Unit or related program for purposes including conferences, meetings and trainings require preapproval of the Executive Director.

Under no circumstances should any receipt that is being submitted for reimbursement include alcohol.

Reimbursement for the purchase of gifts is prohibited.

Itemized receipts are required for reimbursement of classroom, instructional or program related expenses. Because the CAIU warehouse maintains inventory items as well as places orders on a continual basis through group purchasing consortiums, staff are encouraged to not make purchases on their own. However, in situations where it is necessary, items purchased will be reimbursed based on the approval by the program supervisor.

Reimbursement for lost or missing required original receipts will only occur with the submission of the Declaration of Missing Receipt form and approval of the Assistant Business Manager or designee.

Reimbursement of Tax

Due to the Intermediate Unit being exempt from sales tax in the state of PA, sales tax on expense reimbursements will not be processed.

Mileage Reimbursement

An employee who needs to travel for work should check the availability for a CAIU fleet vehicle before using their personal vehicle and seeking mileage reimbursement.

The rate of mileage reimbursement for the use of personal vehicles in the conduct of Intermediate Unit or related program business shall be the same rate as established by the federal government's General Services Administration (GSA). The approved GSA mileage rate can be found on the GSA's website www.gsa.gov. The allowable GSA rate will also be reflected on the Employee Reimbursement form found on the online platform. Note that the GSA is different than the Internal Revenue Service (IRS).

Car Rental

CAIU fleet vehicles are available for staff to use for work-related travel instead of their personal vehicles. Employees must check the availability of a CAIU fleet vehicle before renting a car.

Meal Allowance Rates

The Intermediate Unit will pay meal allowances for breakfast, lunch and dinner when traveling on behalf of the Intermediate Unit or related program. Meals shall be reimbursed at the rate established by the Director of Business and Operations. These rates will not exceed the rates established by the General Services Administration (GSA). The allowable GSA rate will also be reflected on the Employee Reimbursement form found on the online platform.

The meal allowance applies to tax, tips, or delivery fees. Should the allowance be exceeded, the employee will be reimbursed the maximum rate based on the current GSA rate.

Lodging

The Intermediate Unit will direct pay or reimburse up to a set amount of a night plus related taxes for lodging expense incurred on behalf of the Intermediate Unit or related program. Government rates should be requested by all travelers and confirmed at the time reservations are made and at time of check-in. Payment of or reimbursement for lodging expense incurred within fifty (50) miles of the employee's home or official work site is not allowed. Exceptions to this must be pre-approved by the Team Director.

In addition, lodging expenses such as tips paid to bellhops, housekeepers, and valets are not reimbursable.

Legal Footnotes

[1] **24 P.S. 517**
LEGAL REFERENCE

Book	CCIU Board Policy Manual
Section	300 Employees
Title	Job Related Expenses
Code	331
Status	Active
Adopted	July 21, 2010
Last Revised	May 20, 2020

Authority

The Board shall reimburse employees for appropriate expenses incurred in the course of employment. Expenses will normally occur while an employee is away from his/her workstation. Reimbursement may include travel expenses, the cost of lodging and food, and other actual and necessary costs associated with performing Intermediate Unit business.[1]

Definition

A **workstation** is the location in which an administrator, supervisor, project staff member, itinerant staff member or other employee has an established office that is considered the employee's primary location. A workstation can be the Educational Service Center, a school, or any other facility or location operated by the Intermediate Unit. Each employee has a workstation. Employees cannot be reimbursed for mileage to and from their workstation for normal daily work. Unless otherwise agreed to, employees, including itinerant employees, will be reimbursed for employment-related mileage incurred after reaching the first worksite on any given day.

Delegation of Responsibility

It shall be the responsibility of the direct supervisor and division director to determine that all requests for expenses and other reimbursement are reasonable and legitimate.

The Executive Director or designee shall create an administrative regulation for reimbursement of job related expenses.

Guidelines

Authorization for Travel

Overnight travel, except that which is part of a routine job assignment, must be preapproved by the direct supervisor and division director. If total expenses are expected to exceed the amount designated by the Intermediate Unit, preapproval by the Board is required.

Personal Automobiles

Employees will be reimbursed for personal automobile use that is necessary in the performance of their jobs. The per mile rate for reimbursement will be consistent with the rate published by the IRS.

Incidental expenses incurred when traveling by automobiles, including parking fees and tolls, are reimbursable and should be supported by receipts whenever practical. Incidental expenses in excess of the amount per day designated by the Intermediate Unit must be supported by receipts.

Travel reimbursement for staff will begin after the employee has reached his/her workstation or his/her first assignment of each day, and shall end at the last assignment of the day. Mileage costs will not be reimbursed to or from the staff's workstation and place of residence.

Mileage incurred during a second trip for business purposes between an employee's home and workstation or any work site in a day is reimbursable with the prior approval of the employee's supervisor.

Employees working on special assignments, whose first or last work site is farther from the employee's home than their assigned workstation, are eligible to receive reimbursement for the difference in mileage between the first or last work site and the assigned workstation with the prior approval of their supervisor.

Lodging

Expenses for lodging must be consistent with the rates charged in the area in which the accommodation is located and must be supported by receipts. Normally, reimbursement will not be paid for lodging within fifty (50) miles of an employee's workstation. Exceptions may be granted when the nature of the work, meeting or conference involves early morning or late evening activities of a professional nature.

Public Carriers

When public carriers other than a taxi cab, subway or intraurban bus are used, receipts must be submitted to support the reimbursement request.

Meals

Meals purchased while on Intermediate Unit business away from the workstation or worksite are reimbursable. The cost of meals must be consistent with normal costs in the area in which meals are purchased. Meal purchases should be supported by itemized receipts. When receipts for the purchase of meals are unavailable, a statement indicating the location of the purchase and amount must be attached to the request for reimbursement. The purchase of alcoholic beverages is not reimbursable.

Actual Expenditures

Reimbursement, other than for mileage, will be made only for actual expenditures. Whenever possible, expenditures should be supported by receipts showing the amount paid on what dates and to whom. This policy does not provide or authorize per diem travel expense payments.

Conferences

The Board may appropriate funds to pay expenses for participation in clinics, workshops, conferences, seminars and conventions by Intermediate Unit staff. The direct supervisor and division director shall be responsible to approve requests of staff to participate in these activities. When the expected cost of participation is expected to exceed the amount designated by the Intermediate Unit, the Board shall approve participation.

Employees who participate in these activities may be required to report on the activity and share information with other employees.

Completion of Travel Expense Voucher

Vouchers for expenses incurred are to be submitted to the appropriate supervisor for approval as follows:

1. July to September Travel - due by October 15.
2. October to December Travel - due by January 15.
3. January to March Travel - due by April 15.
4. April to June Travel - due by July 15.

Vouchers submitted after August 1 for work-related expenses incurred during the preceding fiscal year, must be approved by Executive Director or designee for reimbursement.

Vouchers submitted after September 30 for expenses incurred in any preceding fiscal year will not be reimbursed.

Business office staff will review and verify all staff travel expense vouchers.

Legal 1. 24 P.S. 517

Pol. 000

Administrative Regulation 331.02 Staff Travel

BOARD POLICY

626.1 Travel Reimbursement - Federal Programs

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
626.1	6/6/2018	v1	ACTIVE

PRINTED
9/25/2026

Authority

The Board shall reimburse administrative, professional and support employees, and school officials, for travel costs incurred in the course of performing services related to official business as a federal grant recipient.[2][3][1]

Definition

For purposes of this policy, **travel costs** shall mean the expenses for transportation, lodging, subsistence, and related items incurred by employees and school officials who are in travel status on official business as a federal grant recipient.[1]

Delegation of Responsibility

School officials and Intermediate Unit employees shall comply with applicable Board policies and administrative regulations established for reimbursement of travel and other expenses. [4] [5]

The validity of payments for travel costs for all Intermediate Unit employees and school officials shall be determined by the Executive Director or designee.

Guidelines

Travel costs shall be reimbursed on a mileage basis for travel using an employee's personal vehicle and on an actual cost basis for meals, lodging and other allowable expenses, consistent with those normally allowed in like circumstances in the Intermediate Unit's nonfederally funded activities, and in accordance with the Intermediate Unit's travel reimbursement policies and administrative regulations.[1] [4] [5]

Mileage reimbursements shall be at the rate approved by the Board for other Intermediate Unit travel reimbursements. Actual costs for meals, lodging and other allowable expenses shall be reimbursed only to the extent they are reasonable and do not exceed the per diem limits established by the Board.

All travel costs must be presented with an itemized, verified statement prior to reimbursement.[2] [3]

In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that:[1] [4] [5]

1. Participation of the individual is necessary to the federal award.
2. The costs are reasonable and consistent with the Intermediate Unit's established policy.

Legal Footnotes

[1] 2 CFR 200.474
LEGAL REFERENCE

[2] 24 P.S. 516.1
LEGAL REFERENCE

[3] 24 P.S. 517
LEGAL REFERENCE

[4] Pol. 004
POLICY REFERENCE

[5] Pol. 331
POLICY REFERENCE

BOARD POLICY

331 Job Related Expenses

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
331	5/2/2018	v1	ACTIVE

PRINTED
9/25/2026

Authority

The Board shall reimburse administrative, professional and support employees for the actual and necessary expenses, including travel expenses, they incur in the course of performing services for the Intermediate Unit, in accordance with Board policy.[1]

Delegation of Responsibility

The validity of payments for job related expenses for all Intermediate Unit employees shall be determined by the Executive Director or designee.

The Executive Director or designee shall develop administrative regulations for reimbursement of travel expenses.

Guidelines

Reimbursement of travel expenses for an administrative, professional or support employee shall be made in accordance with the terms of an administrative compensation plan, applicable collective bargaining agreement, individual contract or Board resolution.

The use of a personal vehicle shall be considered a legitimate job expense if travel is among the employee's assigned schools, but not between home and school, and is authorized in advance by the program supervisor.

Use of a personal vehicle for approved purposes is reimbursable at the IRS rate per mile approved by the Board that is current at the time reimbursement is sought.

Use of a personal vehicle requires that liability insurance be provided by the employee.

Actual and necessary expenses incurred when attending functions outside the Intermediate Unit shall be reimbursed to an employee if approval has been obtained in advance from the Board or Executive Director.[1]

Attendance at approved events outside the Intermediate Unit shall be without loss of regular pay, unless otherwise stipulated prior to attendance.

Under normal conditions, employees traveling on official business shall provide themselves with sufficient funds for ordinary expenses.

Travel shall be by the most direct and economical route.

For official travel by other than automobile, the Intermediate Unit may arrange the advance purchase of transportation tickets.

In all instances of travel and job related expense reimbursement, full itemization with receipts attached shall be required, and shall be submitted in a timely manner.

Legal Footnotes

[1] **24 P.S. 517**
LEGAL REFERENCE

BOARD POLICY

626.1 Travel Reimbursement - Federal Programs

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
626.1	6/15/2016	v1	ACTIVE

PRINTED
9/25/2026

Authority

The Board shall reimburse administrative, professional and support employees, and intermediate unit officials, for travel costs incurred in the course of performing services related to official business as a federal grant recipient. [1][2][3]

Definition

For purposes of this policy, **travel costs** shall mean the expenses for transportation, lodging, subsistence, and related items incurred by intermediate unit employees and officials who are in travel status on official business as a federal grant recipient. [1]

Delegation of Responsibility

Intermediate Unit officials and employees shall comply with applicable Board policies and procedures established for reimbursement of travel and other expenses. [4] [5]

The validity of payments for travel costs for all intermediate unit employees and school officials shall be determined by the CFO/Assistant to the Executive Director or designee.[2][3]

Guidelines

Travel costs shall be reimbursed consistent with those normally allowed in like circumstances in the intermediate unit's nonfederally funded activities, and in accordance with the intermediate unit's travel reimbursement policies and procedures and applicable Pennsylvania Public School Code. [5]

Legal Footnotes

[1] 2 CFR 200.474
LEGAL REFERENCE

[2] 24 P.S. 516.1
LEGAL REFERENCE

[3] 24 P.S. 517
LEGAL REFERENCE

[4] Pol. 004
POLICY REFERENCE

[5] Pol. 331
POLICY REFERENCE

BOARD POLICY

331 Job Related Expenses

POLICY NUMBER	ADOPTED	VERSION	DOCUMENT STATUS
331	4/11/2012	v1	ACTIVE

PRINTED
9/25/2026

Authority

The Board shall reimburse administrative, professional and support employees for the actual and necessary expenses, including travel expenses, as incurred during the course of performing services for the Intermediate Unit, in accordance with Board policy.[1]

Delegation of Responsibility

The validity of payments for job related expenses for all Intermediate Unit employees shall be determined by the Executive Director.

The Executive Director shall develop administrative regulations for reimbursement of job-related expenses for all classifications of employees.

Guidelines

Use of a personal vehicle for approved purposes is reimbursable at the current IRS rate per mile.

Conference Attendance

The Board authorizes the Executive Director to attend educational and other job-related conferences. Additionally, the Board grants the Executive Director discretionary authority to approve the participation of staff at conferences that are judged to be beneficial to the Intermediate Unit. All

costs associated with attendance at such conferences, including the travel expenses of the employee, are to be within budgeted funds as approved by the Board.

Reimbursement of expenses associated with conference attendance shall be according to the travel regulations and procedures of the Intermediate Unit as modified when deemed necessary. The Board shall approve the payment of individual employee conference and travel expenses in the same manner as with the approval of other expenditures.

Attendance at approved events outside the Intermediate Unit shall be without loss of regular pay, unless otherwise stipulated prior to attendance.

Legal Footnotes

[1] **24 P.S. 517**
LEGAL REFERENCE