

# Dos and Don'ts of Employee Travel Reimbursements

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# Introductions

Name: Lauren Hannick, Moderator  
- *Financial Officer, Giant City CCSD No130*



Name: Caty Campbell, Speaker  
- *Business Manager, Pekin Public School District 108*



Name: Linda Matkowski, Speaker  
- *Chief Financial Officer, Champaign Unit 4 School District*



Name: Rachel Wright, Speaker  
- *Business Manager, Herrin CUSD No 4*



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# Best Practices for Employee Travel Reimbursements

- Goals
  - Necessary
  - Fulfills an Educational Objective
  - Consistent and Fair
  - Compliant with state and federal guidelines
  - Reduce audit findings
  - Within appropriate budget limits
  - Follows Board Policy/Administrative Procedures

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# In The News

***Chicago Public Schools employees spent \$23.6 million in tax dollars on lavish vacations at 5-star hotels and overseas trips. Much of it was without approval*** (<https://www.illinoispolicy.org/taxpayers-pay-23-6m-for-chicago-public-schools-vacations/>)

- Out of state travel to Las Vegas, South Africa, Hawaii
- “lax, vague, inadequate and unenforced CPS travel rules, training and procedures”
- Federal pandemic funds
- Culture of entitlement
- “CPS employees have broken the trust of taxpayers by fraudulently spending money for personal benefit”

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# PRESS Policy Examples

## Policy 5:60 Expenses

The Board regulates the reimbursement of all travel, meal, and lodging expenses by resolution. Money shall not be advanced or reimbursed, or purchase orders issued for: (1) the expenses of any person except the employee, (2) anyone's personal expenses, or (3) entertainment expenses. Entertainment includes, but is not limited to, shows, amusements, theaters, circuses, sporting events, or any other place of public or private entertainment or amusement, unless the entertainment is ancillary to the purpose of the program or event. The District is not responsible for losses due to an employee's own negligence, losses due to normal wear, or losses due to theft, unless the theft was a result of the District's negligence. Employees must submit the appropriate itemized, signed, standardized form(s) to support any requests for expense advancements, reimbursements, or purchase orders that show the following:

1. The amount of the estimated or actual expense, with attached receipts for actual incurred expenses.
2. The name and title of the employee who is requesting the expense advancement or reimbursement. Receipts from group functions must include the names, offices, and job titles of all participants.
3. The date(s) of the official business on which the expense advancement, reimbursement, or purchase order will be or was expended.
4. The nature of the official business conducted when the expense advancement, reimbursement, or purchase order will be or was expended.

## Advancements

The Superintendent may advance expenses to teachers and other licensed employees for the anticipated actual and necessary expenses to be incurred in the development, provide

Expense advancement approval for standardized expense that was issued, and (used must be returned process.

## Reimbursements and

Expense reimbursement other expenses needs Board's expense regu

Expense reimbursement approval of expenses for employees, except reimbursement on the purchase orders shall

## Use of Credit and Procurement

Credit and procurement

## Exceeding the Maximum

All requests for expense advancements, reimbursements, and purchase orders exceeding the maximum allowed in the Board's expense regulations may only be approved when:

1. The Board's resolution to regulate expenses allows for such approval;
2. An emergency or other extraordinary circumstance exists; and
3. The request is approved by a roll call vote at an open Board meeting.

## Registration

3. Use of personal automobiles at the standard mileage rate approved by the Internal Revenue Service for income tax purposes. The reimbursement may not exceed the cost of coach airfare. Mileage for use of personal automobiles in trips to and from transportation terminals will also be reimbursed. Toll charges and parking costs will be reimbursed.
4. Automobile rental costs when the vehicle's use is warranted. The circumstances for such use must be explained on the expense form.
5. Taxis, airport limousines, ride sharing services, or other local transportation costs.

Please also refer to the applicable collective bargaining agreement(s).

## Meals

Meals charged to the District should represent mid-fare selections for the hotel/meeting facility or general area. Tips are included with meal charges. Expense forms must explain the meal charges incurred. Alcoholic beverages will not be reimbursed.

## Lodging

Employees should request conference rate or mid-fare room accommodations. A single room rate will be reimbursed. Employees should pay personal expenses at checkout. If that is impossible, deductions for the charges should be made on the expense form.

## Miscellaneous Expenses

Employees may seek reimbursement for other expenses incurred while attending a meeting sponsored by organizations described herein by fully describing the expenses on the expense form, attaching receipts.

## Additional Requirements for Travel Expenses Charged to Federal and State Grants

## 5:60-AP Administrative Procedure - Federal and State Grant Travel Expense Procedures

Employees must follow these procedures, in addition to the requirements of the Board policy 5:60, *Expenses* subhead entitled **Additional Requirements for Travel Expenses Charged to Federal and State Grants**, when their travel expenses are charged to federal grants and State grants governed by the Grant Accountability and Transparency Act (GATA).

## Use of Expense Forms

Employees will submit form and 5:60-E1, *Employee Expense Reimbursement Form*, following completion of travel. When travel expenses will be charged in part to grant funds and in part to non-grant District funds because certain expenses exceed those permitted to be charged to a grant by policy 5:60, *Expenses*, and/or these procedures, the Superintendent or designee notes that fact and the amount to be charged to each funding source in the "Comments" field on 5:60-E1, *Employee Expense Reimbursement Form*.

## Lodging - General

1. Employees are not eligible for actual reimbursement of lodging expenses unless they are on official *travel status* for more than 12 hours. Travel status begins when the employee leaves his or her work location or, if reporting directly to a destination, from his or her residence or other location. It ends when the employee returns to his or her work location or, if reporting directly from the original destination, to the employee's residence or other location at the completion of the authorized travel. See [80 II.Admin.Code §3000.140](#).
2. Employees must first contact any preferred hotel vendors of the District.
3. It is the employee's responsibility to request the lowest available lodging rate the time of making a reservation. However, if the employee requires special lodging consideration due to a disability the employee may be reimbursed the actual cost of the least costly lodging that is substantially accessible. Employees should always inquire if a hotel offers a discounted rate for local government employees, including public school district employees. If applicable, employees should be prepared to show their school identification to prove school district employment when checking-in.
4. Employees should make hotel reservations as far in advance as possible. Employees need to be aware of hotel cancellation policies. In busier times, cancellation policies will sometimes require the traveler to cancel 72 hours in advance or be charged for the room. If an employee must cancel a reservation, the employee needs to cancel before the deadline, if at all possible. Employees making reservations for several nights in a row need to be aware of hotel early check-out policies. Some hotels charge an early check-out fee if a guest checks out prior to their scheduled departure date.
5. Employees must carefully review the bill upon check-out to ensure that the room charge reflects the appropriate rate and that no unauthorized charges have been added. For example, some hotels will automatically add a security charge or phone usage charge to a bill. If these services are not used, the charges should be removed before checking-out. Energy surcharge and lodging resort fees will be reimbursed if not optional.
6. If direct billing, employees must ensure that all personal or incidental charges are paid when checking-out, i.e., pay movies, personal phone calls, etc.
7. Employees must obtain a copy of the hotel bill to attach to 5:60-E1, *Employee Expense*

## Reimbursement Form.

8. If traveling by car, an employee needs to inquire regarding self-parking options to minimize parking expenses.

## Meals

Per diem rates and actual reimbursement amounts for meals may not exceed \$40.00 per day.

## Ride Sharing Services

When using a ride sharing service such as Uber and Lyft, employees must use the lowest cost service the ride sharing service offers such as "UberX" and "Lyft Standard." Employees will not be reimbursed for premium services offered by ride share companies such as "Uber XL," "UberSELECT," "UberBLACK," "UberSUV," "UberLUX," or "LyftPlus." Employees need to be aware that ride sharing services may charge users more during times of high demand. Ride sharing services typically let riders know in advance when prime time or surge pricing is in effect. Rides obtained during these higher cost periods may not be reimbursable.

DATED: March 1, 2024

## Pekin 108 Policies

[4:55 Use of Credit and Procurement Cards](#)

[4:60 Purchases and Contracts](#)

[5:60 Expenses](#)

## Champaign 4 Policies

[4:55 Use of Credit and Procurement Cards](#)

[4:60 Purchases and Contracts](#)

[5:60 Expenses](#)

[5:60 E1 Expense Reimbursement Form](#)



# Travel Policies

- What needs to be pre-approved?
- Do you allow out-of-state travel?
- What should you allow?
- What should not be allowed?
- Do you set any spending limits?
- Are district cards used for travel?
- What documentation should be required?
- Does your CBA have any language around travel?

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# Required Documentation

- Internal form?
  - Require actual receipts
  - Memo when receipt is not available
- Digital reimbursement system?
- Online forms or software?
- Emails?
- Conference materials/agenda

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# Common Issues

- Missing Mileage Documentation
- Meal Receipts Are Not Detailed - Credit Card Signature Receipt Only
- Alcohol On The Receipt
- Over The Daily Per Diem Amount ( <https://www.gsa.gov/travel?topnav=travel>)
- Purchasing Supplies
- No Prior Approval for Conference
- Out Of State Conferences - Used As Personal Vacation
- Rental Cars - Allowed? Insurance? Fuel Costs? Is There A Policy?

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# Grant Related Travel

Title I, II, III, IDEA etc.

In state vs out of state?

Grant Accountability and Transparency Act (30 ILCS 708/)

“Necessary to meet the goals and objectives of the federal grant program and reasonable based on the district’s policies and procedures and state and local laws”

- Are there equally effective, but less costly, alternatives?
- How does the cost compare with similar events?
- Would it be seen as a good use of taxpayer dollars?

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# What Would You Do?

An employee submits a travel reimbursement request for a conference they attended in October last year. It is now April.

You adopt a new textbook series, i.e. new K-5 Math Adoption, and the vendor offers an all expense paid trip for a “conference” in Steam Boat Springs Colorado. It was in the contract for the adoption approval. Yes or No

Employee submits travel reimbursement to the Business Office. Their mileage is computed using 200 miles, when you know they were only two hours away. They also do not have documentation for all of their meals.

Baggage Fees - where they included in the original approval? If not, do you reimburse?

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# Best Practices

- Clear Board Policies/Administrative Procedures equal fewer issues
- Consistency is critical
- Documentation is protection
- Train staff early
- Remind them often
- Request a post-conference attendance PD opportunity
- Conference materials should be gathered and placed in a shareable folder (Operational and Business and Board Conferences)
- Book directly with hotel or airline whenever possible

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# Questions and Answers

*We thank you for your time!*

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# Presenters:

## MODERATOR INFO:

Lauren Hannick, Financial Officer, Giant City CCSD No130  
(618) 457-5391, lhannick@gcs130.org

## PANELISTS INFO:

Caty Campbell, Business Manager, Pekin Public School District 108  
(309) 477-4740, caty.Campbell@pekin108.org

Linda Matkowski, Chief Financial Officer, Champaign Unit 4  
(217) 351-3825, matkowli@u4sd.org

Rachel Wright, Business Manager, Herrin CUSD No 4  
(618) 988-8024; rachel.wright@herrinschools.org

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