

## **SUGGESTED STANDARDS AND/OR GUIDELINES FOR ISDS TO CONSIDER WITH REGARDS TO TRAVEL AND EXPENSE REIMBURSEMENT POLICIES AND STANDARD PRACTICES**

### Guiding Principles

- Review Policies and Practices relative to travel, expense reimbursement, ethics, etc.
- Discuss with auditors and other outside sources as superintendent sees fit.
- Revise policies and practices as necessary.

### Suggested Guidelines for Policies/Practices

- Develop statement of ethical standards.
- Review unlawful expenditures by a governmental unit:  
[http://www.michigan.gov/treasury/0,1607,7-121-1751\\_2194-7603--,00.html](http://www.michigan.gov/treasury/0,1607,7-121-1751_2194-7603--,00.html)
- Review internal district practices and administrative guidelines as they relate to travel, expenses, etc.
- Establish a per diem for lodging, meals, etc. (not to exceed budgeted amount).
- Establish a budget for travel, etc.
- Consider an approval step at the board level of travel prior to the actual event.
- Develop an internal mechanism for oversight of expenses.
- Require a written or verbal report after event.

### Specific Examples of Prohibited Expenses

- State in policy there will be no reimbursement for expenses such as: alcoholic beverages, room service, mini bar charges, valet parking, movies, etc.

### Other Suggestions:

- Establish a guideline that states that Board members and school officials shall pay for their own expenses, submit receipts and then be reimbursed for expenses.
- Once policy/practices are in place, every effort should be made to build awareness of these with board, staff and local districts.

### Miscellaneous

MAISA-MASA/MSBO/MASB agreed to develop a bank of resources with policies and practices from across the state and country:

- MASB will obtain examples from other states of prohibited expenses.
- MSBO will collect policies and procedures from districts.
- MAISA will put the above information on the MASA EduPortal.

The intent of the Committee is to provide broad, but useful guidelines for consideration by ISD superintendents and boards of education. We hope you find this information helpful.

**The above information was compiled at a meeting of the MAISA  
Interagency Collaboration Committee on September 10, 2003**

In attendance:

Jon Tomlanovich, Eaton ISD, Facilitator (in the absence of John Hagel, Chair)  
Bob Jones, Coor ISD  
Charlotte Koger, Easton ISD  
Jeff Siegel, Berrien ISD  
Steve Krusich, Lenawee ISD  
Susan Meston, Muskegon Area ISD  
Mike Flanagan, MASA/MAISA  
Mandy Diroff, MASA/MAISA

Invited guests:

Tom White, MSBO  
Justin King, MASB  
Bill Scharffe, MASB