



POLICY MANUAL

Daily Operations - Policy

Travel & Meeting Policy

Revised: 05-23-07

Code: 1 – 10 – 7

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7.0 Purpose: Establish Travel and Meeting Expense Policy and Procedures.

7.01 Scope: All Fire Department Personnel.

7.02 **POLICY**

City Officials and Employees are required, from time to time, to attend conferences, meetings, and training sessions which relate directly to the concerns of the City or provide job-related educational opportunities. It is the City's intention to allow such attendance without unreasonable financial sacrifice. The purpose of the following policies and procedures is to establish guidelines for City authorized travel and provide reimbursement procedures for reasonable and appropriate expenses. These procedures are not intended to cover every possible circumstance. Anything not specifically covered must be authorized by the City Manager or Department Head. Any Departmental Travel Policy must conform with this policy but may be more restrictive. Departmental Policies must be approved by the City Manager.

7.03 **AUTHORIZED TRAVEL**

All travel at City expense must either relate directly to the general interest of the City or provide job-related educational opportunities. Examples of authorized travel include, but not limited to, the following:

- a. Meetings with other governmental agencies
- b. Professional conferences/organization meetings
- c. Job related seminars

Authorized travel must also be within the budgetary constraints recommended by the City Manager and approved by the City Council. Training must be in conformance with this policy, Departmental Policy, and any State or Federal regulations related to specific training.

7.04 **PRIOR APPROVAL**

An Employee requesting travel at the City's expense must be approved *in advance* by the Employee's Department Head. Department head travel must be approved in advance by the City Manager. Attendees in excess of two must be approved by the City Manager.



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7.05 REGISTRATION AND LODGING

1. **Registration** - The City will reimburse basic registration fees. The City will not reimburse extra registration fees for spouse, program items such as tours, wine tasting, etc. Functions such as organization dinners will be reimbursed.
2. **Lodging** - Reasonable overnight lodging costs will be reimbursed at an amount not to exceed the hotel's standard double occupancy room rate including tax and parking charges. Every effort should be made to make reservations sufficiently in advance to take advantage of any available discounts.

7.06 MEALS AND DAILY EXPENSES

1. **Per Diem** - A per diem allowance may be given Employees to cover personal items such as meals and tipping in lieu of requiring receipts for all expenses. The per diem rate per day for Fire Department Employees is \$50.00. The City Manager or Department Head may set a higher rate based on circumstances. The City Manager may review such circumstances for consistency. Note that payment of per diem in excess of the amount allowed by IRS will be reflected on an Employee's W-2.

Employees may be authorized to attend training seminars or classes where the travel expenses are reimbursed by outside programs such as "POST." These programs may reimburse the City at rates which differ from the above City per diem rate. Reimbursement is to be made to the City and will not affect the City rate.

If per diem is being claimed, the daily per diem amount will be adjusted by the following meal allowance for each meal provided in the registration charge:

Breakfast	\$10.00	
Lunch	\$15.00	
Dinner	\$25.00	
		<u>Total \$50.00 per day</u>

Based on departure time and return time, the per diem will be reduced by the following amounts:

<i>Departures:</i>		
Before 7:00 A.M.		None
Before 10:00 A.M.		20%
Before 5:00 P.M.		50%
<i>Return:</i>		
After 9:00 A.M.		80%
After 2:00 P.M.		50%
After 6:00 P.M.		None



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2. Instead of per diem, an Employee may request reimbursement for actual reasonable meal expenses. In such case, receipts and documents must be provided. If receipts for meals, because of special circumstances, are not available, a statement signed by the Employee indicating the place, date and cost may be acceptable if approved by the City Manager or Department Head.

7.07 TRANSPORTATION

Authorized transportation modes include City-owned vehicles, personal vehicle and scheduled air carriers. Other forms of travel may be authorized by the City Manager. Whenever possible, travel to and from meetings should be by City vehicle, except for employees receiving a vehicle allowance. If a City vehicle is not available or inappropriate, reimbursement for use of a private auto will be at the rate allowed by IRS. City Employees receiving a monthly vehicle allowance will be reimbursed at the rate of 50% of the rate allowed by IRS for round-trip miles in excess of 100 miles. Reasonable cost for transportation to and from the airport will be reimbursed.

If an Employee who receives a vehicle allowance is traveling with another Employee not receiving a vehicle allowance, the travel must be in the vehicle of the Employee receiving the allowance.

City gas credit cards are for the exclusive use of City-owned vehicles. They are not to be utilized to purchase gas or auto supplies for privately owned vehicles ***under any circumstances.***

7.08 PARKING EXPENSES

Parking expenses at the airport, hotel or conference are reimbursable. Parking charges for personal excursions are not reimbursable. Receipts for parking are required except for hotel parking charges which are included with the room charge.

7.09 BUSINESS AND PERSONAL RELATED LONG DISTANCE PHONE CALLS

Long distance phone calls for business related purposes will be reimbursed, provided the phone calls are identified either on a hotel bill or the Employee's phone bill.

Department Personnel may not charge any personal long distance telephone calls to the City. If it is necessary to make a personal long distance telephone call from a City telephone, the charges will be assessed to a home telephone or a telephone calling card. Under no circumstances will personal long distance telephone calls be charged to the City.



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7.10 RENTAL VEHICLES

Use of rental vehicles **must be authorized in advance**. Rental cars may be authorized primarily when the Employee is required to travel, on work related business at the travel destination. Vehicles rented only for the convenience of the Employee to go to dinner or sightseeing are not authorized.

7.11 HOSTING MEALS

Hosting of meals is discouraged. However, elected Officials, City Manager, Department Heads, and others, as approved by the City Manager, may find it beneficial to host, at meal time, members of the public, other governmental officials, or other Employees for the purpose of discussion items of importance to the City. The City will reimburse the City Official or Employee for the reasonable actual cost of hosted meals.

7.12 TRAVEL ADVANCES

The City may advance estimated travel expenses to the Employee. Whenever possible, hotel charges should be paid in advance directly to the hotel. Airline fares should be paid directly to a travel agent or airline.

Travel advance requests must be approved by the Department Head or designee and submitted to the Intermediate Clerk Typist for processing at least seven days prior to departure date.

Note: Checks are cut only on Thursday of each week. Paperwork must be submitted by 1200 hours on Tuesday to get the check on Thursday of that week.

The [Travel Expense Report Form](#) must be submitted for checks to be processed. Advances for unexpected trips will be processed prior to departure when possible.

For example of the *Travel Expense Report Form*, see Insert Sheet A2.

7.13 TRAVEL REIMBURSEMENT CLAIM

Within two weeks following completion of City authorized travel, City Officials and Employees must submit a completed *Travel Expense Report Form* listing all eligible travel costs. All costs, other than per diem, must be supported by receipts. Also to be included with the *Travel Expense Report Form* are copies of any warrant requests for advances, lodging, transportation, per diem, and registration related to that travel, regardless of payee.



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The *Travel Expense Report Form* along with required receipts and copies of advance requests are to be submitted to the Department Head for approval and then given to the Intermediate Clerk Typist for processing. A travel reimbursement request will not be processed by Finance until a *Travel Expense Report Form* is completed.

If the *Travel Expense Report Form* indicates that the City Official or Employee must refund the City for an overpayment, that overpayment must be refunded directly to the Finance Department and a copy of the receipt attached to the *Travel Expense Report Form* prior to review by Finance.

7.14 **TRAVEL ARRANGEMENTS**

Arrangements for Departmental events will be made at the Departmental level. Air travel arrangements shall be made through the City designated travel agent. Air travel credits shall accrue to the City. Exceptions will be allowed for travel arrangements made by a sponsoring organization. Travel arrangements for such events as the League of California Cities Conference, where several departments will attend, shall be made through the City Manager Department.

7.15 **FLSA COMPENSATION – VOLUNTARY TRAINING / TRAVEL**

FLSA actual hours worked must be provided to any employee “voluntarily” attending training or work related activity when such an activity is sponsored by the City. Sponsorship is defined as the City funding any portion of the expense related to employee training or travel or providing vacancy coverage without a leave balance being deducted. Travel time compensation is provided in accordance with requirements of the Fair Labor Standards Act.

7.16 **COMPENSATION – MANDATORY TRAINING / TRAVEL**

Any training, travel, and special event activity when an employee is required to attend is considered “mandatory.” Any event, training or travel funded by the City is considered “mandatory” and the employee shall receive overtime compensation as defined by the appropriate bargaining unit’s Memorandum of Understanding. Actual hours worked during this activity shall be recorded on the employee’s time sheet. Travel time compensation is provided in accordance with requirements of the Fair Labor Standards Act. When travel by air is necessary for a mandatory activity, compensation will be paid to each member traveling in accordance with the appropriate bargaining unit’s Memorandum of Understanding.



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7.17 REQUEST TO ATTEND NATIONAL FIRE ACADEMY AND/OR EMERGENCY MANAGEMENT INSTITUTE

In order to accommodate Employee requests to attend the National Fire Academy (NFA) or the Emergency Management Institute (EMI), the following procedures will be used:

1. All requests to attend a class at the NFA or EMI must be turned in to the Department's Training Officer.
2. A request to attend a class at the NFA or EMI will be considered when a *completed* and *typed* Federal Emergency Management Agency General Admission Application form is submitted.
3. ***The following dates will be adhered to when applying for classes:***

The NFA and EMI operate on a two-semester year with a separate application period for each semester.

The first semester of each fiscal year runs from October 1 to March 31, and applications for this semester must be postmarked between May 1 and June 30. All *completed* and *typed* application admission forms must be received by the Department's Training Officer, by April 1 of that year.

You must reapply for second semester courses if you are not accepted for the first semester. No applications are carried over.

The second semester runs from April 1 to September 30, and applications for this semester must be postmarked between November 1 and December 31. All *completed* and *typed* application admission forms must be received by the department's Training Officer by October 1 of that year.

Applications are not considered by the NFA or EMI if they are postmarked before or after the stipulated open periods.



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4. Criteria for determining applications to attend the NFA or EMI will be based upon the following criteria:
 - Overtime funding available to provide shift coverage.
 - Appropriate shift coverage will be determined by the applicant's Battalion Chief.
 - Priority will be given to the highest rank or those Personnel who have been applying for two semesters or more uninterrupted.
 - Consideration will be given to those who apply and have not attended before.
 - The class requested must be related to a job assignment and/or program or team you supervise.

5. The Fire Chief and Training Officer will review all applications to attend the NFA or EMI and make a recommendation to the Command Team.

Following Command Team approval, the application will be returned to the applicant for submission to NFA or EMI.

In the event that a request to attend the NFA or EMI is denied, the applicant will be notified in writing of the reason(s) for denial by the Training Officer. A denial to attend a particular course at the NFA or EMI will not preclude an individual from reapplying for the same class in a different semester or for a different class.