



# City of Longview Policies, Procedures and Guidelines

Policy Name: <b>Business &amp; Professional Development Travel and Related Expense Policy</b>		Effective Date: May 1, 2001 (revised March 17, 2003)
Supersedes: Previous travel and business expense policies and as stipulated in Personnel Resolution No. 1504	Originating Office: Human Resources	Approved by: City Manager

## PURPOSE OF THIS POLICY:

This policy addresses general business travel, travel for training purposes and professional conferences, association meetings and seminars, as well as reimbursement for such activities. Other aspects of training and development are addressed in the Professional Development and Tuition Reimbursement Policy.

## DEPARTMENTS AFFECTED:

This policy is applicable to all regular full-time (Type A) and part-time (Type B) employees, including those covered by collective bargaining agreements when the matter is not specifically addressed in the contract, subject to the duty to bargain requirements stipulated by State law.

## POLICY/PROCEDURE:

It is the policy of the City to support travel and training expenditures as necessary to accomplish department goals and objectives. Additionally, an investment in employee training and development is necessary to ensure that all staff remain current in the knowledge, skill and abilities required of their positions. Budget proposals and expenditures for travel and training expenditures will be considered in the context of competing demands for expenditures in other areas including personnel and equipment, capital improvements, etc.

Travel expenses when authorized may be paid through one or more of the following methods: the City's advance travel fund, use of a City credit card, through the voucher accounts payable system, and/or by reimbursement to employees who have paid the expenses themselves.

## Budgetary Guidelines

Annual travel and training budgets should relate to the size and makeup of the department's employee population. Expenditures in the following categories would be excluded from the general annual training/travel budget:

- City-funded on-site training programs
- Tuition reimbursement
- Licenses, certifications, and professional membership dues
- Professional/trade publications and subscriptions

## Expenditure Guidelines and Approvals

### **General**

Individual expenditures should be considered carefully to ensure that training and travel expenditures represent a cost-effective investment. Programs that provide immediate, practical skills at the least cost should be favored. Other factors to be considered include:

- The cost of training in relation to the travel and accommodations expenses.
- Economy of scale considerations where one employee can attend and return to train others.
- Maximizing discount opportunities by using Internet resources such as [www.expedia.com](http://www.expedia.com), [www.orbitz.com](http://www.orbitz.com), [www.travelocity.com](http://www.travelocity.com) or [www.priceline.com](http://www.priceline.com) to obtain discount airfares, less expensive lodging, etc.
- Alternative training sources; interactive computer tutorials, ordering only the reference materials for the course, etc.

Generally, all training opportunities and associated travel costs should be pursued within the state of Washington, the Portland metropolitan area or other locations within the region of equivalent distance and cost. City Management will consider exceptions to this guideline for programs that are not available within the areas, activities that are less costly than regional travel, or to allow senior managers and officials to participate in the national programs of their respective professional associations.

### Approval procedures

- All planned travel and training expenditures must be approved in advance by the Department Head or his/her designee; and
- **The City Manager's advance approval is required for all travel and training expenditures approved by the department head.**

### Travel Expenses

#### **Key Travel Expense Considerations:**

- **Dates/Travel Time:** Will changing your travel dates such as staying overnight Saturday dramatically reduce the cost of airfare? Is the cost benefit still evident if you factor in additional hotel and meal costs? How about the extra time you will be missing from work and related staff coverage costs?
- **Hotel/Lodging:** If the conference/training activity is being held at a hotel, are the hotel costs reasonable? Could you obtain a cheaper government rate by calling the hotel directly to book your reservation? Can you reduce lodging costs by staying at a different hotel that offers shuttle service to/from the training event?
- **Transportation:** Obtain the most economical transportation fares by use of advance purchase of tickets and get competitive quotes from Internet travel discount sites (previously referenced) and local travel agencies when possible.
  - Is a rental car necessary? Many hotels have free shuttle service to and from the airport. Is mass transit an option?

- If a rental car is necessary, again, search for the lowest cost option. The City has an established contract with Enterprise Rent-A-Car, Corporate Class Account Number G24416 but you may identify a lower rental rate through a different provider. Further, when a rental car is required, training participants should stay at a less expensive hotel within 10-20 minutes of the training site unless related expenses such as parking would mitigate the cost savings of doing so.
- **Communications:** Verify that cellular phone coverage, pager or long-distance calling charges are reasonably inexpensive before using these services. Wireless roaming costs and phone calls placed during peak calling times could be cost-prohibitive. Less expensive long-distance calling options should be used whenever possible, such as use of SCAN calling cards or prepaid discount calling cards to place business-related calls.

## **Guidelines**

**Allowable expenses (detailed receipts required) include:** Meals; 15% service gratuity (includes restaurant/hotel/transportation); air fare; travel to and from the airport in personal vehicle, rental car, taxi, bus, train, and/or mass transit; baggage checking; business telephone/calling card/FAX; business postage; conference registration fees; currency exchange fees/surcharges, and other similar direct business expenses.

**Vehicle Mileage:** Total amounts allowed for travel on a trip involving air travel includes personal vehicle mileage to and from the airport from City Hall or the individual's residence if the residence is out of the City limits, whichever is closer, and the cost of parking the vehicle at the airport; or the cost of round trip limousine service, or vehicle mileage for drop off and pick up from the airport if less costly than driving and parking the personal vehicle.

When personal mileage is claimed for a trip, the reimbursement shall be based at the rate per mile currently adopted by the IRS, however, the total reimbursement shall not exceed the amount of the round trip coach class airfare if available for the same trip. Employees are encouraged to travel in one vehicle when more than one person is attending the same meeting, and to utilize a City-owned vehicle whenever possible (except management staff who receive a monthly vehicle allowance).

**Meals:** Meals may be paid on a per diem basis. When attending a conference or seminar where some of the meals are included in the price of the registration, the per diem allowance will only include the meals that were not part of the registration. Meals may also be paid on an actual expense basis if accompanied with detailed receipts. The limit on each meal, including the maximum 15% gratuity, is \$3 more than the established per diem rate. This method must be used when paying for meals of other individuals.

**Per Diem Amounts:** The established per diem amount is \$45. The per diem amount for partial days is based on each meal as follows: breakfast @ \$9; lunch @ \$12, and dinner @ \$24.

Reimbursement for meals is intended for activities that occur outside of Cowlitz County, and only when the duration of such activity occurs for more than half of a business day. Payment for meals, or a City provided meal, is also permitted when it is a necessary part of an in-town business or staff meeting that could not otherwise be practically conducted at any other time than during a meal-time.

**Non-allowable expenses include:** Air/train fares or other transportation costs higher than the lower fare options available (unless advanced approval is received from the appropriate Department Head and City Manager); personal entertainment; reimbursement for loss/damage/theft of personal property; expenses of spouse, family or other persons not authorized to receive reimbursement under this policy; beauty parlor/barber shop charges; rental car, airline or other trip insurances; personal postage; personal reading material; personal telephone calls (except one 15 minute call home per day outside of peak calling times); personal toilet articles; liquor; cleaning/pressing of clothing unless stay exceeds five days; and other similar non-business related personal expenses.

Exceptions to these guidelines may be made by the City Manager.

Procedures for business expense reimbursements and payments are addressed in the City's general procedures and guidelines as distributed by the Finance Department.

### **City-Sponsored Training and Business-Related Expenses**

This section addresses reimbursable expenses when the City is sponsoring a business-related activity where out of the area travel is not required; i.e. onsite training functions, employment selection processes, or business activities with outside entities for economic development purposes. If the activity is scheduled to last longer than half of the business day and naturally overlaps into a meal period, then it may be appropriate to provide a meal or refreshments to those in attendance. Such expenses are permitted with advance approval of the appropriate Department Head.

Business expenses and activities related to the City's Economic Development endeavors and activities with industry groups and private sector organizations fall under the direction of the City Manager. Expenses and reimbursement requests related to such activities i.e. food, light refreshments etc. to be provided during said activities must be authorized in advance by the City Manager.

### **REFERENCES:**

Professional Development and Tuition Reimbursement Policy  
City of Longview Travel Expense Report