



City of Longview Policies, Procedures and Guidelines

Policy Name: Business & Professional Development Travel and Related Expense Policy		Effective Date: January 1, 2018
Supersedes: Previous travel and business expense policies and as stipulated in Personnel Resolution No. 1504	Originating Office: Finance	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 employees, including the City Council and employees 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 staff at all levels 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 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, www.orbitz.com, www.travelocity.com, www.priceline.com or other sites to obtain discount airfares, less expensive lodging, etc.
- An alternative to hold down the cost of airfare and lodging is to reference Washington State Department of Enterprise Services website: <http://www.des.wa.gov>. The City of Longview's customer number is "20804". The account number is "888".
- 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 Tri-County area (Multnomah, Clackamas and Washington Counties), Northwest Oregon (Columbia and Clatsop Counties) 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 travel and training expenditures must be approved in advance by the Department Head or his/her designee.
- The City Manager's advance approval is required for all travel and training expenditures that require travel outside the state of Washington or Portland Tri-County area, result in the need for overtime (including backfill) and/or are estimated to exceed a cost of \$1,000.

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 obtaining 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. Further, 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.** Cellular telephone services shall be used for all communications while on travel for City business. Long distance calls from hotel rooms are not allowed.

Guidelines:

Allowable expenses (detailed receipts required) include: Hotel/transportation; air fare to and from PDX (unless less expensive airfare can be obtained from airport nearest employee's home); airline baggage fees for one checked bag; travel to and from the airport in personal vehicle, rental car, taxi, bus, train, and/or mass transit; parking fees, business telephone/internet/FAX; business postage; conference registration fees; currency exchange fees/surcharges, and other similar direct business expenses. Meals will be provided for at the allowable per diem rates as explained below (receipts for meals are no longer required). Purchase of meals for non-employees will continue to require a receipt and are only allowed for business purposes.

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 not exceed the rate per mile currently approved by City policy, however, the total reimbursement shall not exceed the amount of the round trip coach class airfare plus travel related expenses (i.e. mileage to-and-from airport, parking, baggage, etc.) if available for the same trip. Employees are to travel in one vehicle when more than one person is attending the same meeting, and to utilize a City-owned vehicle whenever possible

Meals/Per Diem Rates: The city provides for meal expenses in two different ways: in advance on a per diem basis (preferred), or reimbursed on a per diem basis after returning. After the fact reimbursements for business travel will be provided through the City's normal claims cycle process via a voucher and limited to the per diem rates for the region where the training was provided. The reimbursement limit on each meal (including gratuity) is the established per diem rate. **City credit cards should not be used for the purchase of meals.**

The receipt method must be used when paying for meals for non-employees. When attending a conference or seminar where some of the meals are provided, the per diem allowance will only be allowed for meals that are not provided.

Conference brochures and registration must accompany all advance travel requests and per diem reimbursements.

The established per diem amounts for Washington (except for King County) and Oregon are as displayed in the table below.

Meal	Per Diem Rates*
Breakfast	\$15
Lunch	\$16
Dinner	\$28

*The per diem amount for travel outside of Washington and/or Oregon as well as travel to King County shall be based on the per diem rate established by the U.S. General Services Administration (GSA) for that zip code.

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 advance approval is received from the City Manager); airline baggage fees in excess of one checked bag; lodging costs within 75 miles of City Hall or personal residence, whichever is nearer**; personal entertainment; 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; personal toilet articles; liquor; cleaning/pressing of clothing unless stay exceeds five days; and other similar non-business related personal expenses.

*Unless approved by the City Manager, all airfare is to be booked through Portland International Airport (PDX). Airfares higher than the lower option will be based on departures and arrivals booked through PDX.

**All lodging within 75 miles of City Hall or personal residence must be pre-approved by the City Manager.

Note: when travelling to or returning from conferences/workshops, expenses for breakfast and/or dinners during normal working hours will not be provided for on days of departure or return.

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/agencies for economic development and board/committee 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 and the Community and Economic Development Director. 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