

**NEW BUSINESS - ITEM #3**

**SUBJECT: Policy 8.4 – Travel**

**FOR AGENDA OF: November 10, 2021**

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Policy 8.4 – Travel has been updated and follows this page.

**ACTION:**

Review and discuss  
Motion, if approved

**POLICY 8.4: EMPLOYEE TRAVEL AND TRAINING**  
**AUTHORIZATION AND REIMBURSEMENT**

**A. GENERAL EXPECTATIONS**

All members of the District are expected to use good judgment regarding the expenditure of funds for travel and training expenses. Only through teamwork can the cost to District be minimized.

**B. DOCUMENTATION OBJECTIVES**

The Procedures for documenting the expenses involved with employee travel and training or for District related business activities are designed to provide public accountability in two areas:

1. Pre-approval of all travel and training requests to ensure that it is appropriate to the needs of the District and that budgeted funds are available for specific requests; and/or
2. A complete accounting of the actual expenses for the travel to ensure that the expenses reported for reimbursement are appropriate and provide appropriate documentation.

**C. APPROVAL**

The Fire Chief shall authorize registration, travel and attendance expenditures in advance within the budgeted amounts adopted by the Board. Fire Chief expenditures are to be approved by the Board.

**D. TRAINING AND TRAVEL REQUEST**

At least two weeks prior to the anticipated travel or training, the employee should submit a completed "TRAINING CLASS REQUISITION" form to the Deputy Chief of Training and Operations or the Fire Chief. This will document the advance approval of requested travel and/or training and provide a basis for any advance of funds to the employee. Advance funds are limited to the estimated per-diem rate of the District.

The cost of the training class or conference, if at all possible, will be billed to and paid by the District directly to the vendor. If that is not possible, then documentation of payment by the employee will be the basis for reimbursement.

## E. TRAVEL SETTLEMENT

Within one week after the travel has been completed, the employee must turn in receipts for lodging and all other expenses to be paid on an actual basis. This applies if per-diem is not accepted or authorized in advance of the travel.

## F. GUIDELINES

The following general guidelines apply to the reimbursement of employee travel expenses.

### 1. Transportation

The actual cost of transportation, taxi fares, and similar items incidental and necessary to the performance of official business while on travel status will be paid. If the employee's personal vehicle is used, the District will reimburse the employee at the current IRS mileage rate for the actual mileage required for the trip. The IRS mileage rate will be updated as needed and staff will be notified of changes. Parking and other related expenses must be documented by receipt.

Every attempt will be made to use District vehicles for travel, if the use of that vehicle will be a cost savings to the District.

### 2. Lodging

Hotel and motel accommodations should be appropriate to the purpose of the trip. Expenses for lodging must be supported by actual receipts. Reimbursement for lodging is generally limited to the expense of a single room, except where employees are sharing a room. If an employee chooses to make other arrangements for lodging, a payment of \$96.00 per night may be allowed in lieu of paying the actual accommodation costs. The District will make every effort to book lodging and pay for lodging in advance.

### 3. Meals

Employees will be allowed a per diem rate of \$55.00 per day for meals. This is broken down as follows: \$10.00 for breakfast, \$14.00 for lunch, and \$31.00 for dinner. No receipts are required for meals covered under the per diem. These amounts will be reviewed periodically.

### 4. Telephone and Telegram

Expenses for telephone and/or telegram communications are reimbursable only if they are directly related to District business and are supported by actual receipts. Personal telephone calls charged to the District or to your room and paid by the District must be reimbursed.

5. Registration and Tuition Fees

Expenses for registrations and/or tuition fees are allowable expenses, and a copy of the registration must be attached to the "TRAINING CLASS REQUISTION" form. The District will make every effort pay for tuition expenses in advance.

6. Accompanied Travel

Any expenses for family members who accompany the employee on a trip are not reimbursable.

7. Alcoholic Beverages

Any expenditures for alcoholic beverages are not allowed and reimbursement will be required if any are charged to the District.

## **POLICY 8.4: EMPLOYEE TRAVEL AUTHORIZATION & REIMBURSEMENT**

This provision is to also apply to the Fire Chief.

### **A. GENERAL EXPECTATIONS**

All members of the District are expected to use good judgment regarding the expenditure of funds for travel expenses. Only through teamwork can the costs of travel on District business be minimized.

### **B. DOCUMENTATION OBJECTIVES**

The Procedures for documenting the expenses involved with employee travel on District related business activities are designed to provide public accountability in two areas:

1. Pre-approval of all travel requests to ensure that the travel is appropriate to the needs of the District and that budgeted funds are available for specific travel requests; and
2. A complete accounting of the actual expenses for the travel to ensure that the expenses reported for reimbursement are appropriate and provide appropriate documentation.

### **C. APPROVAL**

The Fire Chief shall authorize registration, travel and attendance expenditures in advance within the budgeted amounts adopted by the Board. Fire Chief expenditures are to be approved by the Board.

### **D. TRAVEL REQUEST**

At least two weeks prior to the anticipated travel, the employee should submit a completed REQUEST FOR EXPENSES form to the Training Chief or Fire Chief. This will document advance approval of the requested travel and provide a basis for an advance of funds to the employee. Advance funds are limited to the estimated per-diem rate of the District.

### **E. TRAVEL SETTLEMENT**

Within one week after the travel has been completed, the employee must turn in receipts for lodging and all other expenses to be paid on an actual basis.

## F. GUIDELINES

The following general guidelines apply to the reimbursement of employee travel expenses.

### 1. Transportation

The actual cost of transportation, taxi fares, and similar items incidental and necessary to the performance of official business while on travel status will be paid. If the employee's personal vehicle is used, the District will reimburse the employee at the current IRS mileage rate for the actual mileage required for the trip. The IRS mileage rate will be updated as needed and staff will be notified of changes. Parking and other related expenses must be documented by receipt.

### 2. Lodging

Hotel and motel accommodations should be appropriate to the purpose of the trip. Expenses for lodging must be supported by actual receipts. Reimbursement for lodging is generally limited to the expense of a single room, except where employees are sharing a room. If an employee chooses to make other arrangements for lodging, a payment of \$93.00 per night may be allowed in lieu of paying the actual accommodation costs.

### 3. Meals

Employees will be allowed a per diem rate of \$51.00 per day for meals. This is broken down as follows: \$9.00 for breakfast, \$13.00 for lunch, and \$29.00 for dinner. No receipts are required for meals covered under the per diem. These amounts will be reviewed periodically.

### 4. Telephone and Telegram

Expenses for telephone and/or telegram communications are reimbursable only if they are directly related to District business and are supported by actual receipts. Personal telephone calls charged to the District or to your room and paid by the District must be reimbursed.

### 5. Registration and Tuition Fees

Expenses for registrations and/or tuition fees are allowable expenses, and a copy of the registration must be attached to the Request for Expenses form.

### 6. Accompanied Travel

Any expenses for family members who accompany the employee on a trip are not reimbursable.

### 7. Alcoholic Beverages

Any expenditures for alcoholic beverages are not allowed and reimbursement will be required if any are charged to the District.