

Mendocino County Workforce Investment Board

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Policy No. 18

Travel Policy

Purpose and Background

The Governor has designated Mendocino County as a Local Workforce investment Area (LWIA) under the federal Workforce Investment Act of 1998 (WIA). The Mendocino County Workforce Investment Board (WIB), appointed by the Board of Supervisors, acts as the overseer of WIA programs in Mendocino County. Over half the members of the WIB are from the private sector and serve as community volunteers without financial compensation. The remaining members of this “business-led” board represent partner agencies. The WIB is staffed through the Mendocino County Department of Social Services, but financed with WIA administration funds.

The Workforce Investment Board realizes the importance of having well-informed and well-trained board members and encourages its members to participate in regional, state and national workforce training seminars and conferences. Due to the mountainous geography, vast size, and rural and somewhat isolated location of Mendocino County, it is often necessary for WIB members to travel significant distances to these conferences and/or to regular or special WIB meetings within Mendocino County.

In an effort to minimize any financial hardship service to the WIB may cause its members and in order to sponsor and encourage member participation at training sessions and conferences, the WIB reimburses members for expenses incurred during service to the WIB. This policy is meant to set forth the guidelines for such spending and reimbursement and to reflect and accommodate the unique requirements of WIB members. It is based on the Mendocino County *Travel and Meal Policy*, as amended February 12, 2002.

General Guidelines

WIB members traveling on WIB-related business should do so in the most reasonable economic manner possible. This would include obtaining government rates or special conference rates at hotels, “shopping” for reasonable airfares, and using public transportation if available and reasonably convenient. Carpooling is encouraged but not required.

Conference Attendance

Any WIB member wishing to attend a conference/training session should submit his/her application of interest to the WIB staff. The WIB staff will prepare an estimate of costs for the conference/training session and then submit the costed application to the Executive Committee. It is preferable that the applications be submitted to the Executive Committee at least one month prior to the conference/training.

The Executive Committee will determine the funding available for any given conference/training. It is the intention of the Workforce Investment Board to offer training to as many members as possible within the funding appropriated for a particular conference or training. Attendance priority will be given to those member applicants who serve as officers of the WIB, who have not previously attended a training session or conference, and/or to those who are new to the Board. The Chair of the WIB will resolve any conflicts that may arise regarding conference attendance.

Members who represent partner organizations and who have training funds available from those organizations should use those funds, whenever possible, prior to asking for WIA sponsorship.

Members who attend conferences and/or training sessions are expected to make a report to the full WIB at the next regular meeting of the WIB following the conference and to contribute informational and training materials to the WIB resource library.

Once a member has been approved for a conference/training, staff will complete the necessary travel request forms and submit them to the fiscal division of the Department of Social Service for processing.

Travel Arrangements

When at all possible, staff will be responsible for all conference registration arrangements, hotel reservations, transportation reservations and trip logistics.

Reimbursable Expenses

Members will be reimbursed for most expenses incurred while on WIB business.

- **Conference/training registration fees** will be paid from WIB funds directly to the conference/training provider. No out-of-pocket expenses for conference registration fees need be incurred by WIB members, unless, last minute registration precludes prepayment.
- **Hotel accommodations** will be paid, whenever possible, directly to the hotel with no reimbursable expenses resulting. Staff will arrange for a waiver of transit occupancy taxes and provide WIB members with approved waiver forms. Members are not expected to share a room with other board members or staff.

- **Mileage** will be reimbursed at the County of Mendocino approved rate. That rate will be adjusted periodically to reflect the current rate established by the Internal Revenue Service (IRS). Any member intending to be reimbursed for mileage incurred while on WIB business must have proof of automobile insurance coverage or a Certificate of Insurance on file with the County of Mendocino (see **Insurance** below). Such proof of insurance must be given to staff prior to travel.
- **Intercity/state transportation** (excepting a personal vehicle) reservations will be made by staff in consultation with the traveling WIB member. Staff will seek the most reasonable airfare and ground transportation. Public transportation, when possible, is encouraged.
- **Intracity transportation** (in city of conference/training) expenses including taxis, shuttles, and public transportation will be reimbursed.
- **Toll charges** are reimbursable expenses.
- **Parking** is a reimbursable expense. Members are encouraged to use self-park garages when possible.
- **Incidental Expenses** are reimbursable up to \$5.00 per day. Tips for meals are included in the meal rate.
- **Meals** are reimbursable at the rate of \$6.00 for breakfast, \$9.00 for lunch, and \$15.00 for dinner. In some IRS designated “higher rate” cities, the reimbursement for meals will be greater. Staff will ascertain those higher rates, include them on the member’s Travel Request form, and notify member accordingly. Only those meals not covered by conference/training registration fees and purchased more than two hours travel distance from a member’s home will be reimbursed.
- **Telephone/Fax/Telecommunication Charges**
Telephone, facsimile, and other telecommunication charges directly relating to WIB activities are reimbursable expenses.

Automobile Insurance

The liability on any personal vehicle used for WIB business must conform to the minimum requirements of the California Vehicle Code (\$15,000/\$30,000 liability and \$5,000 property damage). Members will not be reimbursed for mileage expenses unless proof of automobile insurance coverage or a Certificate of Insurance is on file with the County of Mendocino. Members should submit proof of such coverage to staff prior to travel.

Companions

Companions may accompany WIB members on WIB-related business trips. Companion meals are not a reimbursable expense. Hotel accommodations will be covered up to the single room rate.

Prohibitions

Workforce Investment Act funds may not be used for foreign travel or for the purchase of alcoholic beverages.

Post Conference/Training

Following the conference/training, members will be required to submit a Travel Reimbursement form, together with required receipts, in order to be reimbursed for expenses incurred. The form should be submitted to staff no more than 25 days following the conference/training. Travel Reimbursement forms and the expenses noted thereon must be approved by the WIA Coordinator prior to being submitted by staff to the County for payment.

Receipts

Receipts are required for reimbursement of conference/training registration, hotel accommodations, transportation fares, toll fees, parking charges, and communication expenses. All taxi, shuttle, and bus fares and incidentals of over \$5.00 require a receipt. Receipts are not necessary for meals.

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