



GUIDELINES FOR CITY COMMISSIONS, BOARDS AND COMMITTEES FOR ATTENDANCE AT CONFERENCES AND TRAINING EVENTS

POLICY The purpose of this policy is to establish guidelines for official travel of City Board and City Commissioners who travel to conferences and training events.

Aligned with the City of Santa Clara Code of Ethics and Values, the City is committed to fiscal responsibility and the prudent use of public resources to protect long-term financial stability. To promote open and transparent government, the City Council establishes guidelines for official travel by members of City Boards and Commissions. In general, international and out of state travel is discouraged.

This policy defines the types of expenses that are authorized during official travel and the process for requesting reimbursement. Reimbursements will not exceed the limits set forth in these guidelines.

All travel expenses are subject to review and verification by the City Auditor to ensure compliance and eligibility.

CRITERIA FOR OFFICIAL TRAVEL

1. Travel must be related to the Commissioner or Boardmember's roles or duties and be approved by the City Commission/Board.
2. Attendance at conferences and training events should be rotated among members when feasible.
3. All travel requests require pre-approval by the Board or Commission. Urgent or late travel requests before a meeting may be approved by the City Manager.
4. Out-of-state is subject to availability of funds and requires City Manager approval .
5. No more than two members may attend the same out-of-state conference or training event.
6. No more than three members may attend the same in-state event. If more than three members request to attend an event, the Commission/Board must vote to authorize additional members, subject to the availability of funds.
7. Single-day meetings and events that do not require an overnight



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PROCEDURE

stay are allowed subject to the availability of funds.

8. International travel requires approval by the City Council, and travel outside of the United States is generally discouraged.
9. Overnight lodging is not permitted for local travel, defined as less than fifty (50) miles from Santa Clara City Hall.
10. The City Manager may approve overnight if extensive commuting would otherwise be required.
11. The Historical and Landmarks Commission may, when necessary, designate an advisor to attend an event in place of a commissioner. In compliance with AB 1234, Commissioners/Boardmembers must report on their attendance at a conference or training. A verbal update should be provided at the next meeting, although a brief written report may be submitted instead. ~~(See the "Resource Material" section of "Board and Commission Handbook and Survival Guide" for more information.)~~

Travel arrangements should be made as far in advance as possible to obtain the best possible fares, early bird and discounted rates, and to avoid late registration fees.

- 1) All itemized receipts and documentation must be submitted within thirty (30) business days of travel to staff for processing with the City Auditor's Office.
- 2) Expense and mileage reports must document that the expense meets the requirements of this policy. Inability to provide such documentation in a timely fashion may result in the expense being borne by the official.
- 3) **Non-reimbursable expenses:** Expenses that are personal, political, or entertainment related are not eligible for reimbursement. Alcohol expenses for family members or guests, and costs associated with extending a trip for personal reasons are also non-reimbursable.

An extension of the trip outside of the official travel pre-authorization period to include additional days or weekends for personal reasons, does not entitle the traveler to be reimbursed for any expenses on extra



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REIMBURSABLE EXPENSES

days including lodging, meals or additional airfare expenses.

Lodging

Lodging is covered for approved overnight travel, including the night before and the night after an event. Receipts are required, and reimbursement is limited to actual costs.

If no specific lodging site is designated for official City business, the City will reimburse the actual cost of lodging at an alternative location.

Meals

Where a conference or other event includes a meal or meals as part of the costs of the activity, no separate meals will be reimbursed unless due to dietary restrictions. The City will pay for the meals for Commissioners/Boardmembers during authorized **overnight travel only** as detailed below.

Meal expenses are reimbursed, including tax and tips and incidentals, up to the General Services Administration (GSA) per diem rate for the destination (available at <http://www.gsa.gov/perdiem>) for a full day of travel. Itemized receipts showing the expense amount are required for Councilmembers to receive reimbursement. Reimbursements are capped at the GSA amounts detailed below.

On the first and last travel day, meals are reimbursed at 75 percent (75%) of the per diem rate. The Meals & Incidental Expenses will be used to generate the per diem rate for meals. Any meals provided as part of the conference, event, or hotel, must be deducted from the reimbursement as listed on <http://www.gsa.gov/mie>.

Alcohol, guest meals, and hotel incidentals (e.g. in-room services) are not eligible for reimbursement.

Transportation



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Use of Private Vehicles: Members shall be compensated for the use of their private vehicles for approved business travel at the current GSA standard mileage rate, provided that it is the most logical and least expensive method of transportation.

Bridge Tolls/Parking: Bridge tolls and parking fees incurred while traveling on City business are reimbursable with receipts. Councilmembers shall obtain itemized receipts and submit them with their Travel Expense Reports.

Train /Other Mass Transit: Members shall be compensated for train or other mass transit fares and fees provided that it is the most logical and least expensive method of travel.

Ground Transportation: Supplementary transportation within the destination city shall be accomplished by hotel courtesy buses, local shuttle services or public transportation, if available and logical. Taxi or rideshare may also be used.

Airfare: Airfare must be booked at the lowest reasonable fare that provides the most direct route. Air travel options shall not be limited to a specific airline. Refundable tickets are permitted if there is a risk of cancellation. One checked bag is reimbursable. Any unused credits from official travel must either be applied to future City travel or reimbursed to the City.

Cancellation

If travel arrangements must be canceled, members are expected to notify staff as soon as practicable to allow sufficient time to avoid or minimize additional costs to the City. Failure to provide timely notice may result in the member being disqualified from travel for at least six months.

Rewards and Promotional Benefits

Boardmembers/Commissioners may earn frequent flyer miles or other travel rewards (such as airline, hotel, or vendor loyalty points) while on official City travel. However, if personal frequent flyer miles or other reward points are used to purchase tickets or services for City business, the value of those tickets or services is not reimbursable.



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Promotional benefits or materials received during official travel, if obtained under the same conditions as those offered to the general public and at no expense to the City, may be retained for personal use.