

CHAPTER 9 TRAVEL, TRAINING, AND CONFERENCE GUIDELINES

Introduction

This chapter provides travel reimbursement and transportation guidelines in accordance with the State Department of Personnel Administration and the California Department of Public Health, per the State Administrative Manual, Chapter 700, located at <http://sam.dgs.ca.gov>. The travel approval process and training approval criteria are also provided, along with the approval request form.

Local agency staff must use the safest and most economical means of travel and lodging possible. Destination events must be directly related to conducting official WIC business.

All documentation used for travel expense reimbursement claims must be maintained on file at the local agency for audit purposes. Claims for travel expenses must include receipts, itineraries, miles driven and other relevant documentation.

I. Daily Expense Allowances

Reimbursement Criteria

A local agency employee may be reimbursed for their travel expenses when travel is to conduct official WIC business, the distance is more than 50 miles from headquarters (meals and lodging), and the expenses meet the criteria for reimbursement identified in this chapter.

Maximum Per Diem for Each 24-Hours

The daily maximum per diem allowances for reimbursement are listed below:

Per Diem Allowance	Expense
\$7	Breakfast
\$11	Lunch
\$23	Dinner
\$5	Incidentals

Maximum Lodging Rates (pre-tax)

Lodging Rates	County
\$90	All counties except those listed below
\$95	Napa, Riverside, and Sacramento
\$120	Los Angeles, Orange, and Ventura, and Edwards AFB, less the City of Santa Monica
\$125	San Diego, Monterey, Alameda, San Mateo, and Santa Clara
\$150	San Francisco and City of Santa Monica

Per Diem Allowance Parameters

Less than 24 hour travel

If the trip was...	and the employee...	allowable
Less than 24-hours and the distance is more than 50 miles from their headquarters Note: lunch and incidentals are not allowable	left at or before 6:00 a.m. and returned at or after 9:00 a.m.	breakfast
	left at or before 4:00 p.m. and returned at or after 7:00 p.m.	dinner

Short-term travel of more than 24 hours

If the trip was...	and the employee...	allowable
24-hours or more	stayed overnight	breakfast, lunch, dinner, lodging, and incidentals

Last fractional day of travel

If the trip was...	and the employee...	allowable
More than 24-hours Note: incidentals are not allowable	returned at or after 8am	breakfast
	returned at or after 2pm	breakfast lunch
	returned at or after 7pm	breakfast lunch dinner

Reimbursement for Driving a Privately Owned Vehicle

Employees may claim mileage reimbursement when authorized to use a privately owned vehicle for official WIC business. The current mileage reimbursement rate can be found at www.calhr.ca.gov/employees/Pages/travel-personal-vehicle.aspx. The mileage reimbursement rate includes the cost of gasoline, maintenance, insurance, licensing and registration, depreciation, and all other costs associated with operation of the vehicle.

If an employee is dropped off at the airport and no parking charge is incurred, the employee may claim double the number of miles between the terminal and the employee's headquarters or residence, whichever is less.

The local agency supervisor is responsible for ensuring that an employee driving a privately-owned vehicle used for official WIC business has a valid California driver's license, has evidence of insurance, and will wear a seat belt.

II. Allowable Business Expenses

Communication

Telephone calls, fax charges, and telecommunication charges made to conduct official WIC business are allowable costs. Documentation is required for reimbursement and must include the date, party called, reason for the call, and proof of payment (hotel invoice, telephone bill, etc.).

Parking

Parking fees are reimbursable. A receipt is required when the expense for any one continuous parking fee exceeds \$10. Parking at the airport should be limited to "long-term" (lowest cost) parking at all times. Parking reimbursement is not an allowance; only actual expenses are reimbursable.

Registration

Registration fees for attending conferences or training are allowable costs. Expenses for lodging and meals not provided at the conference or training is an allowable costs. If the registration fee to attend the conference or training includes meals or lodging, those expenses may not be reimbursed as a separate travel expense. A copy of the conference or training brochure must be included with the documentation maintained at the local agency.

Lodging

Shared rooms

When employees share lodging expenses, each employee must claim one half the room rate charged. Both employees must submit a copy of the receipt and both employees must note the name of the other employee. If two employees are sharing a room and the divided costs are not in excess of the maximum county commercial rates, then State WIC Program approval is not required.

Excess Lodging Rates

Individual lodging expenses in excess of the maximum county commercial rate requires State WIC Program approval prior to the proposed travel. Local agencies must submit the WIC Local Agency Training Approval Request Form (Attachment 9-1) and justification to their State WIC Program regional advisor.

Extended Trips for Personal Convenience

If a local agency employee extends a business trip for personal reason, only the expenses relating to the WIC business may be claimed.

Out-of-state Travel

Out-of-state travel requires written approval from the State WIC Program at least 10 business days prior to the proposed travel, unless blanket approval has been granted for a specific event.

III. Transportation Guidelines

Least Costly Transportation Mode and Allowable Charges

The least costly and most reasonable mode of transportation must be used. When a more costly method of transportation is chosen, justification must be kept on file at the local agency and retained for audit purposes. Transportation modes consist of commercial airlines, taxi, bus, shuttle, train, subway or automobile.

If a local agency employee uses a personal vehicle in lieu of air transportation, the maximum amount reimbursed shall be either the coach/economy fare or the mileage rate, whichever is less. Allowable charges include personal vehicle mileage, parking fees, and bridge and road tolls.

IV. Training

Approval Process

Local agency employees traveling to attend training must complete a WIC Local Agency Training Approval Request form (Attachment 9-1) and submit it to the State WIC Program regional advisor at least 10 business days prior to the event unless ALL of travel criteria described below have been met. The form should indicate if Continuing Education Units (CEU) are being earned.

When Training Approval is not Required

State WIC Program approval is **not required** for training events that meet ALL of the following criteria:

- a. training event is consistent with the local agency staff training plan identified in the NSP;
- b. training event is within California;
- c. attendees are WIC employees;
- d. registration fee and travel costs are less than \$1800 per person;
- e. Total cost of consultants to provide the training is \$2500 or less.

Local agencies should consider arranging training events at local venues if the cost of consultants is less than the registration fees and travel costs of an out of town training event.

V. Conferences

Approval Process

Local agency employees traveling to attend conferences must complete a WIC Local Agency Training Approval Request form (attachment 9-1) and submit it to the State WIC Program regional advisor at least 10 business days prior to the event, unless blanket approval has been granted. The form should indicate if Continuing Education Units (CEU) are being earned.

In-State Conferences with Blanket Approval

The State WIC Program is authorizing blanket approval for local agency staff to attend the following in-state conferences:

- California WIC Annual Spring Conference
- California WIC Annual Fall Management Conference
- California Dietetic Association (CDA) Conference
- Childhood Obesity Conference

Out-of-State Conferences with Blanket Approval

The State WIC Program is authorizing blanket approval for local agency staff to attend the out-of-state conferences identified below because they are WIC or Registered Dietitian association sponsored events and are attended by a large number of local agencies. Other conferences will be reviewed and approved on an individual basis. Blanket approval precludes the need for local agencies to submit separate documents for approval; however, local agency staff must obtain individual approval to attend conferences from their supervisor.

- Academy of Nutrition and Dietetics Food and Nutrition Conference and Expo
- National WIC (NWA) Conference
- NWA Leadership Conference
- NWA Nutrition and Breastfeeding Conference

Actual lodging expenses will be reimbursed and require a receipt; however, due diligence must be made to secure reasonable and economical rates. Meals and travel expenses will be reimbursed based on the rates identified in this chapter.

VI. Attachments

WIC Local Agency Training Approval Request

Attachment 9-1

WIC LOCAL AGENCY TRAINING AND TRAVEL REQUEST / APPROVAL

Date: _____

Date Approval Needed: _____

Local Agency Name: _____

Phone: _____

L/A Manager Approving Travel: _____

Signature: _____

Training Information (NOTE: *Please attach conference flyer or training description*)

Name of Training: _____

Date(s) of Training: _____

Location of Training: _____

Reason for Attendance: _____

Request that the Following Staff Attend Training

Name/Position Title

1. _____

5. _____

2. _____

6. _____

3. _____

7. _____

4. _____

8. _____

Category	Number of Attendees	Cost Per Person	Total for Attendees
Registration		\$	\$
Lodging *		\$	\$
Per Diem		\$	\$
Airline		\$	\$
Vehicle Rental	(# of Days)		\$
Personal Vehicle Mileage @ Current Rate	(# of Miles)		\$
Other (Please Specify)		\$	\$
		TOTAL COST	\$

* Attach Excess Lodging Rate Request Form if needed

Considerations for Training Planning

- Are there adequate funds in the appropriate line of your current Fiscal Year WIC budget for this training?
 Yes No
- Is this training included in your NSP training plan for the current fiscal year?
 Yes No

STATE USE ONLY
 Request Approved Request Not Approved Comments:

Regional Staff Signature _____

Date _____

 Request Approved Request Not Approved Comments:

Section Chief Signature _____

Date _____