

**Truckee Tahoe Workforce Housing Agency**  
**Training, Education, and Conference Attendance:**  
**Attendance Guidelines and Reimbursement Policy**  
**Policy 2021-02**

1. **Purpose:** To establish guidelines for attendance and expenses at educational conferences, professional meetings, and other agency-related business.
2. **Authority:** The authority to attend trainings and conferences and receive reimbursement of expenses at said events is based on the guidelines included within this policy.
3. **Training and Attendance Guidelines:**
  1. Staff and Members of the Board of Directors are encouraged to attend educational conferences and professional meetings when the purposes of such activities are to improve Agency operation. Hence, there is no limit as to the number of Agency Staff or Directors attending a particular conference or seminar when it is apparent that their attendance is beneficial to the Agency. "Junkets" (a tour or journey for pleasure at public expense), however, will not be permitted.
  2. The decision to send an individual(s) to a seminar, conference, or meeting will be made by the Executive Director and Board Chair. When making a request to attend a function the employee will provide justification and an estimate of the cost.
  3. All Agency staff and Directors shall receive two hours of training in general ethics principles and ethics laws relevant to public service within one year of appointment to the Board of Directors, and at least once every two years thereafter, pursuant to government Code Sections 53234 through 53235.2.
    - a. All ethics training shall be provided by entities who have consulted with the California Attorney General and the Fair Political Practices Commission.
    - b. Directors shall obtain proof of participation after completing the ethics training. Agency staff shall maintain records indicating both the dates that Directors completed the ethics training and the name of the entity that provided the training. These records shall be maintained for at least five years after Directors receive the training, and are public records subject to disclosure under the California Public Records Act.
    - c. Agency staff shall provide the Board of Directors with information on available training that meets the ethics training requirements of this policy at least once every year.
    - d. Ethics training may consist of either a training course or an approved set of self-study materials with tests, and may be taken at home, in person or online.
    - e. Any Agency Director that serves on the board of another agency is only required to take the training once every two years.
  4. Upon returning from seminars, workshops, conferences, etc., where expenses are reimbursed by the Agency, Directors are required by statute to make a written or oral presentation to the Board of Directors at the next regular board meeting. Said report shall

detail what was learned at the event that will be of benefit to the Agency. Materials from the event may be delivered to the Agency office to be included in the Agency library for future use of the other Directors and staff.

#### **4. Reimbursement Guidelines:**

1. Transportation expenses incurred by an employee to attend a seminar, conference, training, or meeting will be reimbursed in accordance with IRS reimbursable rates as established in Publication 463, or any successor publication. If a commercial flight, rental car, or other form of transportation is required to attend the approved event, the most economical and time efficient form of transportation must be utilized. After approval of the travel, the ticket should if possible be booked using the Agency's credit card. Any transportation expenses that are not payable in advance (rental cars, hotels) may be charged to an individual's credit card; however, all documentation must be submitted for reimbursement.
2. Every effort must be made to obtain receipts for travel expenses. Those receipts will be submitted along with a Travel and Expense Report within two weeks of the trip to receive reimbursement.
3. If lodging is in connection with the event, such lodging costs shall not exceed the maximum group rate published by the conference or activity sponsor. When lodging is not available in conjunction with the event, government or group rates at a mid-price range hotel will be reimbursed, not to exceed IRS reimbursement rates. Receipts are required for reimbursement.
4. Meals and Incidentals:
  - a. The Agency will pay for meals during authorized travel up to the per diem amount per the United States General Services Administration (GSA) ([www.gsa.gov](http://www.gsa.gov)). The per diem amount is inclusive of all taxes and tips, and there are breakdowns for individual meals. The GSA website prorates first and last day of travel. The Agency expects travelers to prorate travel days per GSA breakdown.
  - b. If meals are included in the cost of a meeting, conference or training, the Agency will not pay per diem for a meal that the attendee elects to purchase from another source unless additional support is provided for such meal. Such additional support must sufficiently address that the meals provided do not meet the needs or taste of the traveler. The attendees' general election to incur additional meal expense without reasonable justification does not qualify for reimbursement.
  - c. This per diem methodology for meals that is limited to the GSA amount eliminates the need for attendees to submit receipts. Thus the Travel and Expense Report only needs to include the per diem amounts but not the actual receipts. This only applies to meals and incidentals, as all other travel expenses require a receipt to substantiate the purchase.
  - d. The Agency will pay for goods and/or services necessary for the completion of official business during travel. This includes expenses for things such as computer or internet usage.

- e. The Agency will not pay for in-room movies, optional recreational events (such as golf) at conferences, laundry/dry cleaning, alcohol, or any other items of a personal nature.
  - f. A traveler may request an advance of the meal and incidental per diem per the requirements and limitations of this Policy Instruction. The request must be made one week before the date of travel. The per diem advance will be fully accounted for in the expense report filed upon their return.
  - g. Meals are generally not to be paid with the Agency issued credit card since the Agency utilizes the per diem methodology which increases efficiency for the traveler/employees and the Agency in processing reports. However, if an Agency credit card is utilized, itemized receipts are required. The cost shall not exceed the applicable per diem amount.
5. Travel by Air. Travelers shall select the most economical method of transportation available. When selecting Air Fare, the following shall apply:
- a. The Agency permits travelers to check one bag.
  - b. The Agency permits travelers to select the most economical air fare offered where the traveler selects his/her seat.
  - c. When traveling by air with a leg of more than 2 hours, Travelers have the option of selecting priority, business, comfort, economy extra, etc. class seating when the cost is reasonable and has been approved by the Executive Director prior to purchase. The Agency will not pay for First Class seating.
  - d. Vehicle Parking: Travelers will use the least expensive parking facility available at the time of travel. The Agency does not reimburse for premium or covered parking unless that is the only parking available at the time of travel.
6. Nonessential expenses such as room service, health and fitness center, cocktails and movies will not be eligible for reimbursement. These costs should not be directly charged to your hotel room bill if at all possible. Spouses, partners, family members, etc are permitted to travel with employees. The additional cost for the meals, lodging and transportation of a spouse, partner, or family member will not be eligible for reimbursement.
7. All parties seeking reimbursement shall complete an expense report form within two weeks of their return from the trip. The expense report must be accompanied by all appropriate receipts and submitted to the Executive Director.