



ADMINISTRATIVE ORDER NO. 2007-04

Amending the City of Bozeman Training and Travel Policy

Effective on April 1, 2007 the City of Bozeman Training and Travel Policy, which was initially adopted via Administrative Order 2005-04, is hereby amended.

DATED this 29 day of March, 2007.

Chris A. Kukulski

Chris Kukulski, City Manager



City of Bozeman Training and Travel Policy

Statement of Philosophy

Training, and associated travel, is a necessary part of the operation of City government. Attendance by staff and elected officials at conferences and training seminars and programs is a beneficial use of taxpayer dollars as it is vital to provide the public with safe, quality services.

Department Heads are responsible for meeting and serving the education and training needs of their department. Funds for education, training and associated travel should be adequately budgeted by the Department Head. Justification for the budget request shall be the responsibility of the Department Head during the budget process, and each Department Head shall allocate the funds so designated in a conscientious manner, having due regard to the overall needs of the department. However, every effort shall be made to secure outside funds such as grant funds to supplement training and travel budgets. Whenever a department secures outside funds, those outside funds shall not be used to reduce training and travel budgets or future allocations in budget cycles.

All training, and associated travel, whether in-state or out-of-state, shall fall under this policy. Education and training opportunities shall be considered on the basis of merit to the department, and shall not be discouraged because it involves out-of-state travel.

Guidelines

Department heads shall exercise their best judgment, based on the needs of the department, in exercising these guidelines. Employee discretion may dictate deviations from these guidelines based upon the individual situation confronted.

- The Department Head, or designee, must approve all travel in advance.
- Each department shall consider budgetary implications of all travel plans and allocate resources as necessary to provide the greatest benefit possible to the department and the City. Government rates shall be used whenever possible.
- Personal expenses will not be a reimbursed expense. Alcohol; tobacco; entertainment (when not part of the conference or convention package as pre-approved); loss or damage to personal property; fines, fees forfeitures; and personal grooming are all considered personal expenses.

Policy

It is the policy of the City of Bozeman to reimburse for actual and necessary expenses associated with travel in an official capacity. This policy is to be used by City employees and elected officials who travel on City business. All City employees are required to follow these procedures for any training and travel.

1. All travel, including the means of transportation to and from a destination, must be approved by the appropriate Department Head before any trip is made. The use of a Travel/Advance Reimbursement Request form is required for all travel (except within the

City of Bozeman). The form will be submitted to the Finance Department through your Department Head for processing when an advance is required or for reimbursement. The Department Head must sign the form approving the request or it will be returned by the Finance Department.

- A. A written Travel/Advance Reimbursement Request form should be submitted one (1) week in advance of any travel plans. For out-of-state travel, a brief statement of the justification for the travel and any attempts to find comparable training in-state or locally, shall be included in the request.
 - B. Cash advances may be requested (\$50.00 or more) to offset undue financial hardship on employees traveling for City business. A Travel/Advance Reimbursement Request form must be used, and the request must be justified with reasonable requests for meals, registration, lodging, public transportation and other expenses.
- II. All travel paid for by the City which is outside the Continental limits of the United States must be reviewed and approved by the City Manager.
- III. All transportation shall be by the most economical means--taking into consideration the direct cost of the carrier, the cost of the employee's time away from the office, and expenses incurred for additional nights lodging and meals.
- A. Airlines: All commercial air travel shall be by the least expensive service available, generally coach rates. An employee may be asked for documentation justifying the means of transportation and/or cost savings. Advance planning should be used to take advantage of various special airline rates. When airfare rates are considerably less leaving a day earlier, the City will pay the extra day's meals and lodging.
 - B. Lodging: The City will reimburse only for the single occupancy rate. When an employee is accompanied by a spouse or other guest, the lodging invoice shall note the single occupancy rate for the hotel/motel, and shall be signed by an authorize employee of the hotel/motel. The employee is responsible for the difference and any room charges not pre-approved. All lodging will be reimbursed with appropriate receipts. Lodging is authorized at the actual cost (including tax) in a hotel or motel which is the site of the conference or training, and includes lodging at an approved alternative site.
 - C. City Vehicle Use: Whenever possible, employees shall use City vehicles for official City business. See City of Bozeman Vehicle Use Policy. In addition, Employees using City vehicles will obtain a gasoline credit card from the Department Head or Finance Department if the purchase of gasoline is anticipated. If the gasoline card is not accepted, or expenses for gasoline or other repairs occur, the Employee shall submit receipts for such expenses to obtain reimbursement.
 - D. Personal Vehicle Use: See City of Bozeman Vehicle Use Policy.

- E. Economy Measures: When practical, employees will carpool when attending the same conference or training. An employee may take their own car but will not be reimbursed for mileage, or upon agreement split the reimbursement with the other drivers. Cost-sharing measures are encouraged when practical and appropriate.
- F. Other: Reimbursement for expenses incurred for Taxi/Bus/Shuttle services shall be allowed. Receipts should be obtained where possible, but if no receipts are available, then an explanation (accounting) of the request is necessary. Reimbursement for rental car expenses must be pre-approved by the Department Head. A justification for the need for a rental car must be included with the Travel Advance/Reimbursement Request form.

IV. Reimbursement for business related telephone calls, conference registration, tuition and necessary conference or training materials will be allowed with the appropriate receipts or proof of attendance. Whenever possible, registration, tuition, and material costs should be pre-paid through the City or billed to the City.

V. Travel expenses which require reimbursement shall be supported by vendor receipts, with the exception of per diem. No reimbursements will be made without vendor receipts or documentation, except for certain instances where receipts are not customarily provided. A request for such reimbursement must be submitted within one week of the employee's return.

VI. MEALS will be reimbursed on a PER DIEM basis only. Any expenses over the per diem rate are the responsibility of the Employee. Exceptions to the policy are discouraged, but the Department Head may grant a deviation from this policy in exceptional circumstances.

A. The following per diem rates are established. They include 15% gratuity:

Meals	In-State	Out-of-State
1. Breakfast	\$ 6.00	\$ 8.00
2. Lunch	\$ 8.00	\$ 10.00
3. Dinner	<u>\$ 14.00</u>	<u>\$ 18.00</u>
4. Total:	\$ 28.00	\$ 36.00

B. Employees may not claim a meal if it is included in the registration cost of the training/conference. Exceptions, at the discretion of the Department Head, include additional costs for banquets, and when the employee attends a training session or required business meeting during a scheduled meal.

VII. Employees may be asked for additional information or documentation before reimbursement.

VIII. The City Manager may approve exceptions to this policy.

IX. EFFECTIVE DATE: Initially adopted via Administrative Order 2005-04
Updated: April 1, 2007

A handwritten signature in cursive script that reads "Chris A. Kukulski".

Chris Kukulski, City Manager