

CITY OF CARSON			POLICY/PROCEDURE
NUMBER 2.11			SUBJECT Event Attendance and Reporting
ORIGINAL ISSUE	7-23-71	EFFECTIVE 7-23-71	
CURRENT ISSUE	11-18-03	EFFECTIVE 11-18-03	CATEGORY General Administration
SUPERSEDES	2.11, 2.25, 3.26.1 and 6.32		

STANDARD MANAGEMENT PROCEDURE

I. PURPOSE AND SCOPE

To establish a policy and standard management procedure whereby elected officials, city personnel, commission and board members are authorized to attend conferences, conventions, seminars, workshops or meetings that are of benefit to the City.

II. GENERAL

A. Definitions

Conference/Convention: An official gathering of professional or governmental organizations, associations or agencies normally requiring attendance of two or more days.

Conference/Convention Costs: Expenditures incurred for registration fees, meals (if not included as part of the conference/convention), lodging and tips.

Seminar/Workshop: An official training session presented by a professional or governmental organization, association, agency or board, which requires attendance for a full working day or major portion (more than 5 hours) of a working day.

Seminar/Workshop Costs: Expenditures incurred for registration fees and meals (if not included as part of the seminar/workshop).

Meeting: Monthly or quarterly professional association meetings that may include breakfast, lunch, or dinner.

Travel Costs: Expenditures for transportation to and from the site of the scheduled event.

III. EVENT ATTENDANCE AND REPORTING

A. Policy

1. All full-time employees attending conferences, conventions, seminars and workshops are subject to this policy. Conference attendance will not be

allowed for employees on long-term disability, worker's compensation or leave without pay.

2. Part-time, temporary, probationary or contract employees cannot attend conferences/conventions unless authorized by the General Manager and City Manager, as applicable.
3. Spouses or others accompanying the attendee must pay their own costs. Those costs should not be charged to nor included with City-paid costs.
4. The City Manager shall be issued a City credit card to be used solely for approved City business expenses. The City Manager will be required to account monthly for all charges and will be personally liable for unauthorized charges.

5. Event attendance is authorized on the following basis:

- a. All Attendees:

Attendance must be of benefit to the City.

- b. Elected Officials:

1. Annual League of California Cities conference.
2. California Contract Cities Association conference.
3. Any other conference, convention, seminar or workshop that is deemed by the elected official to be beneficial to their performance as an elected official.

- c. City Manager, Assistant City Manager and General Managers:

1. Annual out-of-state professional conferences, as approved by the City Manager.
2. Annual League of California Cities conference.
3. California Contract Cities Association conference.
4. Annual statewide professional conferences.
5. Annual regional professional conferences.
6. Professional Association meetings as authorized by the City Manager.

7. The City Manager, Assistant City Manager and General Managers, or their appointed designee, may attend breakfast, lunch or dinner events sponsored by the Chamber of Commerce, Carson Coordinating Council or other businesses or community groups at City expense and on City time. (See SMP No. 3.47)

d. Managers, Chief Deputy City Clerk and Chief Deputy City Treasurer:

1. One out-of-state professional conference annually, if approved by the General Manager or City Manager, as applicable.
2. Annual League of California Cities conference, if approved by the General Manager or City Manager, as applicable.
3. One statewide professional conference annually.
4. One regional professional conference annually.
5. Professional Association meetings as authorized by the General Manager or City Manager, as applicable.
6. Members of the Association of Management Employees (AME) may attend one work-related professional event at the employee's election each fiscal year, with General Manager approval and provided funding is available. The event must be held within the Western Continental United States. This event may be in addition to any others required by the employee's General Manager. The employee shall receive no additional compensation or consideration if the employee elects not to attend a professional event in any given fiscal year.

e. Administrative Analysts, Personnel Analysts and Council Field Representative:

1. Annual League of California Cities conference, if approved by the General Manager or City Manager, as applicable.
2. One work-related professional event at the employee's election each fiscal year, with General Manager approval and provided funding is available. The event must be held within the Western Continental United States. This event may be in addition to any others required by the employee's General Manager. The employee shall receive no additional compensation or consideration if the employee elects not to attend a professional event in any given fiscal year.

3. One regional professional conference annually.
4. Professional Association meetings as authorized by the General Manager or City Manager, as applicable.

f. Supervisors and Professional Association Members:

Supervisors and Professional Association members may attend one work-related professional event at the employee's election each fiscal year, with General Manager approval and provided funding is available. The event must be held within the Western Continental United States. This event may be in addition to any others required by the employee's General Manager. The employee shall receive no additional compensation or consideration if the employee elects not to attend a professional event of his/her choosing in any given fiscal year. Supervisors and Professional Association members may also attend business or city-related events in and out of the state as authorized by the General Manager or City Manager, as applicable.

g. Other Personnel:

1. Personnel, other than those specified above, are authorized to attend local professional events:
 - i. Upon the prior approval of the General Manager or City Manager, as applicable.
 - ii. If attendance will be of benefit to the City.
 - iii. In accordance with current labor agreements.
2. Out-of-state events must be approved, in advance, by the General Manager or City Manager, as applicable.

h. Commissions and Boards:

1. One national or statewide professional event annually per commission or board, with the one attendee designated by the commission or board.
2. All requests must be approved by the City Council, in advance, through the agenda process.

5. In order to provide a reasonable degree of flexibility within a work group, this policy can be modified by:

- a. The substitution of a senior manager reporting to the General Manager for a General Manager who will not be attending.

- b. A General Manager may substitute one event for another, provided the costs are not in excess of the approved appropriation and if such substitution is in the best interest of the City.
 - c. City employees selected as an officer of their professional association, and whose attendance at meetings is required, may be authorized to attend by the General Manager or City Manager, as applicable, after review of request and if sufficient funding is available.
 - d. If a General Manager and his/her immediate subordinate propose to attend the same scheduled event, special approval will be required by the City Manager, if both will be absent more than one day. If both are not absent for more than one day, no prior approval is required.
6. The reimbursement of costs will be handled as stated below. For a, b, c and d, only actual costs will be reimbursed by the City, subject to the following restrictions:
- a. Registration Fees: Whenever possible, registration fees will be paid by the City, directly to the event promoter, prior to the scheduled event. Every possible effort should be made to take advantage of early (reduced fee) registration and to avoid late registration and additional fees. In the event the participant pays registration fees at the door, reimbursement will be provided upon proof of payment.
 - b. Recreational activities: Those activities that have costs which are in addition to the event registration fees and which may be attended by City employees together with other event participants for or involving purposes of rapport and communication on event-related matters or where the activities are wholly or partially event-related, may be reimbursed by the City. (from SMP No. 3.26.1)
 - c. Lodging (daily rate and applicable taxes for a single standard room only): Total estimated costs can be paid directly to the hotel, in advance, by the City. A one-night hotel stay in advance of the event will only be allowed if one cannot reasonably travel to the event on the day that the event begins. A one-night hotel stay at the end of the event will only be allowed if one cannot reasonably return home by 10:00 P.M. No overnight stay will be allowed for attendance at local events (within a one-hour drive from home). Pursuant to Federal regulations, receipts are required for reimbursement of lodging costs. Every effort should be made to stay at the conference hotel or a hotel of similar price. Should an employee choose to stay at a different hotel, the costs in excess of the conference hotel rate will be borne by the employee. Personal items such as in-room movies, spa services, excursions, etc. should be paid directly to the hotel/provider by the

employee.

- d. Telephone Calls: City business-related telephone calls may be charged to the lodging bill. One personal call per day, not to exceed \$8, is reimbursable.
- e. Travel: The total cost of air travel including all taxes, parking fees and transfer fees will be paid directly to the City's travel agent or City employee, upon submission of invoice or receipt. Total cost is limited to the cost of a round trip coach class airfare, parking fees and transfer fees. This method of establishing total travel costs shall apply regardless of the mode of travel selected. Those electing to travel by private automobile or other mode of transportation may claim the total costs delineated above or established mileage allowance, whichever is less. Mileage must be based on the actual odometer reading from City Hall or traveler's home address, whichever results in the lesser mileage. Mileage calculations will be verified via mapquest.com.

The mode of travel should be based on the least total cost to the City after all expenses are tabulated. Travel time is based on that required via the most appropriate mode of transportation. If an attendee desires travel time in excess of the most appropriate mode of transportation, such time must be authorized by the General Manager and will be charged against the employee's accumulated leave or taken as leave without pay, as appropriate.

Ground transportation will be reimbursed at the actual cost of the taxi, bus or shuttle service. The use of a rental car will only be authorized when it is more cost effective than any other means of transportation or if other means of transportation (taxi, bus, shuttle service) are not available.

Travel time for non-exempt employees shall be accomplished outside of the employees' normal work hours when travel occurs on a non-work day. If travel must be accomplished during normal work hours on a non-work day, non-exempt employees will be paid overtime for the travel time. Non-exempt employees who are mandated by the City to attend conferences/conventions, seminars/workshops or other meetings on non-work days will be paid overtime for actual time of such attendance. With advance notice, non-exempt employees may be required to, or with approval may voluntarily, adjust their normal work schedule to attend an event scheduled on non-work days.

- f. Daily Per Diem: A daily per diem will be provided for the cost of meals, including tips.

The per diem for meals will be \$50.00 per day, including tip. Reimbursement for alcoholic beverages is prohibited. The per diem will be paid directly to the attendee in advance of the scheduled event, if properly approved forms are submitted in a timely manner. Regularly programmed event meals or banquets included in the registration fee will be excluded from the daily per diem.

1. Breakfast: \$10.00
2. Lunch: \$15.00
3. Dinner: \$25.00

In addition to the stipend for meals, an additional \$10.00 per day will be provided for incidental costs, such as tips and gratuities not associated with meals.

Employees not requesting a per diem in advance will be reimbursed for each meal on an actual basis plus tips, to a maximum of \$50.00 per day.

No per diem shall be issued for local or one-day events. Reimbursement for lunch only shall be on an actual basis plus tips.

Pursuant to Federal regulations, a final "Cash Advance/Reimbursement Authorization and Expense Record" form must be submitted, with all expenditures detailed. Receipts are not required for per diems. This expense record must be submitted within two calendar weeks of return from the scheduled event.

7. Attendance at professional or governmental events must be of benefit to the City. Each person authorized to attend an event has direct responsibility to attend all sessions at the event and is expected to return with information that can be shared with other staff members and that will be of specific value to the City, work group, department or division.
8. Meetings between City employees where meals are purchased shall not be reimbursed as "business luncheons." Such meetings or discussions should be held in City facilities and are not reimbursable. The only exception to this rule is for meetings authorized and attended by the City Manager, as allowed for in his employment contract. (from SMP 2.25)

IV. PROCEDURE

A. Responsibilities

1. City Manager, Assistant City Manager and General Managers:

- a. Determine those events that work group staff should attend and estimate the cost of attendance for each event and attendee.
 - b. Discuss work group's proposed event attendance with City Manager during the budget process.
 - c. Include costs of those events approved by the City Manager in work group's preliminary budget.
2. City Manager:
 - a. Approve requests contingent upon the benefits to be derived by the City.
 - b. Include an appropriation in the work group's budget to provide for costs of attendance at all approved events and submit recommendation to City Council as part of preliminary budget.
 - c. Upon Council approval of the preliminary budget, include approved appropriation in final work group budget.
3. Attendee:
 - a. Submit 5 copies of the "Cash Advance/Reimbursement Authorization and Expense Record" form and supporting documents to immediate supervisor at least two weeks prior to event registration deadline.
4. Attendee's Immediate Supervisor:
 - a. Approve "Cash Advance/Reimbursement Authorization and Expense Record" form and route to General Manager.
5. General Manager:
 - a. Review, approve and route "Cash Advance/Reimbursement Authorization and Expense Record" form to the Administrative Services General Manager, or City Manager, as required.
6. City Manager:
 - a. The City Manager shall approve:
 - i. Requests from his/her work group staff.
 - ii. Requests from General Managers.

- iii. Other requests requiring his/her approval (part-time, etc)
- iv. Unbudgeted requests.

b. Upon approval, the City Manager shall forward the "Cash Advance/Reimbursement Authorization and Expense Record" form to the Administrative Services General Manager.

7. Administrative Services General Manager:

- a. Review requests for accuracy of amounts and account numbers, compliance with SMP, proper supporting documents and receipts, availability of funds, and appropriate signatures.
- b. If everything is in order, approve the form by signature in the appropriate box.
- c. Retain a copy of "Cash Advance/Reimbursement Authorization and Expense Record" form.
- d. Forward remaining 4 copies of the "Cash Advance/Reimbursement Authorization and Expense Record" form to the City Treasurer.

8. City Treasurer:

- a. Upon receipt of an approved "Cash Advance/Reimbursement Authorization and Expense Record" form, the City Treasurer or Chief Deputy City Treasurer shall review for accuracy, prepare check and distribute forms as follows:
 - i. A copy to be retained by the City Treasurer's Office;
 - ii. A copy to be routed to originating work group;
 - iii. A copy to the employee;
 - iv. Original copy to be returned to Administrative Services upon submittal of revolving fund replenishment request.
- b. Release check per City policy.

9. Attendee:

- a. Attend scheduled event.
- b. Upon return, submit final "Cash Advance/Reimbursement Authorization and Expense Record" form to the Administrative Services General Manager within two calendar weeks. Attach a copy of the form from the City Treasurer's Office (see 8a). Receipts are

required for all expenditures except those covered by the per diem. The attendee must sign the section certifying that all expenditures were incurred for official City business.

- c. Impart to subordinates and colleagues all information that might be of value to the City through appropriate staff meetings, short briefing sessions or a written report.

10. Commissions and Boards:

- a. Determine appropriate conference to be attended.
- b. Designate attendee.
- c. Request City Council approval of attendance, in advance, through agenda process.
- d. Commissioner or Board Member designated as attendee:
 - i. Attend scheduled event.
 - ii. Upon return, submit final "Cash Advance/Reimbursement Authorization and Expense Record" form to the Administrative Services General Manager within two calendar weeks. Attach a copy of the form from the City Treasurer's Office (see 8a). Receipts are required for all expenditures except those covered by the per diem. The attendee must sign the section certifying that all expenditures were incurred for official City business.
 - iii. Impart to colleagues all information that might be of value to the City through appropriate commission or board meetings, briefing sessions or a written report.

V. **EXCEPTIONS**

There will be no exceptions to these procedures unless authorized by the City Manager.

VI. **AUTHORITY**


Jerome G. Grooms
City Manager

Date 1/22/04

VII. EMPLOYEE ACKNOWLEDGEMENT AND SIGNATURE

I have read and understand the City of Carson's SMP No. 2.11 – Event Attendance and Reporting and hereby agree to adhere to said policy. In addition, I agree to submit a final "Cash Advance/Reimbursement Authorization and Expense Record" form, with all expenditures detailed, and receipts attached as required, within 2 calendar weeks of my return from the scheduled event. Finally, I understand that if I violate this SMP, my reimbursement and/or future travel may be denied.

Employee Signature

Employee Name (please print)

Date