



East County Fire and Rescue Standard Operating Guidelines

Title Travel and Training Expense and Reimbursement	SOG # 1.3.4
Policy Adoption <i>Joshua Leeds</i>	Date 6/18/2024
Standard Operating Guideline Adoption <i>[Signature]</i>	Date 6/14/2024

Purpose

This Standard Operating Guideline (SOG) defines policy and procedure for expenses related to official district business travel, training, but excluding the district's Educational Assistance Program which provides supports members' attendance of courses taken for credit towards completion of an academic degree or certificate.

Scope

This SOG applies to all district members (inclusive of employees and volunteers as well as elected and appointed officials) who are authorized by the board of fire commissioners, fire chief, or designee to expend funds for official district related travel and/or training¹.

Policies

East County Fire and Rescue has established the following policies related to training and travel expense and reimbursement:

- ECFR encourages all members to expand their knowledge, skills, and abilities through professional development programs on a local, state, and national or international level. In addition, the district encourages its members to participate as a member of local, state, and national professional organizations.
- East County Fire and Rescue (ECFR) is a good steward of public funds. To that end, district expenditures must be for a valid public purpose which benefits the community, is directly related to the districts' authorized functions, and which does not have as its primary objective the benefit of a private interest.

¹ Expenses related to training programs that are taken through a college or universities for the purpose of obtaining a required certification (e.g., Emergency Medical Technician) are included within the scope of this SOG. However, any payment for transcription of college credit related for these courses is addressed by Standard Operating Guideline (SOG) 5.6.1 Educational Assistance (Under Development).

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- ECFR maintains appropriate internal fiscal controls to promote effective and efficient use of resources; to safeguard resources against loss due to waste, mismanagement, abuse, or fraud; and to ensure compliance with applicable state and federal laws, regulations, and fiscal best practices.

Procedure

The following procedures define the internal fiscal controls for the district's travel and training expenditures. Additional information on external training and the training request process is provided in *Standard Operating Guideline (SOG) 5.1.2 External Training* (ECFR, Under Development).

Authorized Expenses

District resources (e.g., funds, vehicles, equipment) must only be used for authorized district business. Expenses incurred in connection with the following types of activities are generally considered authorized expenses, provided that funding for the specific activity or type of activity has been included in the district's adopted budget and the requirements of this SOG are met:

- Attending training programs related to district operations.
- Investigation and study of best practice which may improve the effectiveness or efficiency of the district's service to the community.
- Participating in professional organizations whose activities support or effect district operations.
- Communication with representatives of regional, state and national government on district policy positions, legislation, or regulatory action which effects or impacts district operations.

The following types of expenses are not authorized:

- Personal travel appended to official district travel (inclusive of taxi fares to or from non-district business related locations).
- Family expenses, including partner's expenses when accompanying a member on official district travel.
- Entertainment expenses while on official district travel.

Expenditures specifically identified in the adopted budget may be approved by the applicable program manager responsible for that activity (e.g., captain). Expenditures within budgeted funds, but not specifically identified in the adopted budget must be approved by the fire chief or his or her designee.

Transportation Expenses

The mode and class of transportation selected should minimize overall total cost based on travel expenses and staff time.

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Air Travel: The district limits airfare expense to coach class fares on regularly scheduled flights. Members are encourage to book airfares well in advance of travel (whenever possible) to take advantage of discounted economy fares.

Train: Travel by train is authorized if the expense and time required will be less than air travel or automobile. As with air travel, the district limits expense for rail travel to coach class fares.

Automobile: Members traveling by automobile should use an appropriate district staff vehicle (if available) and carpool whenever possible.

The district has a commercial account with Chevron and district staff vehicles are provided with a Chevron fuel charge card. The fire chief and captains are issued a district Visa procurement (charge) card for authorized purchases. District credit cards may be used to charge fuel for authorized travel.

Note: Fuel charge cards may only be used for fueling district vehicles or for purchasing fuel for district power equipment. Any other use is strictly prohibited.

If a district staff vehicle is available and the member chooses to drive his or her own vehicle, the member will be compensated at the applicable GSA mileage rate (currently \$\$0.22/mile).

Several options exist if a district staff vehicle is not available.

- **Local:** Local travel is defined as destinations less than 100 miles from the district headquarters Fire Station at 600 NE 267th Avenue in Camas, WA. For local travel, the district will pay mileage at the Federal General Services Administration (GSA) rates in effect at the time of travel.
- **Non-local:** For other than local travel an appropriate rental vehicle (based on the number of members traveling) should be used if the cost of the rental is ≤10% of the mileage reimbursement cost.

The current GSA mileage rate may be obtained on [the GSA Privately Owned Vehicle Mileage Reimbursement Rate](#) web page (GSA, 2024a). To qualify for reimbursement, mileage must be documented using an ECFR Mileage Record (Appendix A). If travel on district business is combined with personal travel, authorized mileage will be determined using the most direct route calculated using [Google Maps](#).

If the member will be combining travel for district business with personal travel (e.g., vacation), use of a district vehicle or district rental vehicle is not authorized and members will be reimbursed for business related travel distance at the applicable mileage rate depending on if a district staff vehicle would have been available for the business-related travel (e.g., if a district vehicle would have been available, the lower mileage rate referenced above would be used for the district business travel distance, if no district vehicle was available, the higher mileage rate for personally owned vehicle use would be used).

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Per Diem

Federal per diem rates published by the General Service Administration (GSA) will be used to determine appropriate expenses for lodging, meals, and incidentals. Per diem rates are based on location and may be accessed using the [GSA Per Diem Rate](#) web page (GSA, 2024b).

Lodging: ECFR members should book lodging in “fire safe” properties certified in compliance with the Hotel & Motel Fire Safety Act of 1990. The GSA per diem rate for lodging applies to the cost of lodging excluding tax (which is also a district expense). Lodging expenses with the specified GSA Per Diem rate are appropriate. However, there are a number of reasons that may make more expensive lodging expenses acceptable (approval will be given on a case-by-case basis), these include:

- The hotel is where the training, conference, or meeting is held, thus saving additional transportation expenses.
- The hotel was the least expensive hotel in the training, conference, or meeting area.
- The hotel was within walking distance of the training, conference, or meeting location.
- The room was shared with a colleague (ECFR or other agency) and the cost was shared, reducing total lodging expense below the per diem rate.

If lodging is not available within the specified federal per diem rate, the fire chief or designee may authorize lodging at up to, but not to exceed 300% of the per diem rate.

Meals and Incidentals: As authorized in Revised Code of Washington (RCW) 42.24.090, ECFR provides members traveling on district business with an advance in the amount of the GSA Per Diem Rate for Meals and Incidentals for the travel location(s) lieu of actual expenses. Meal expenses include breakfast, lunch, and dinner. Incidentals include fees and tips given to porters, baggage carriers, bellhops, hotel maids, etc.

Per diem for meals and incidentals is paid at 75% of the daily rate on the first and last day of travel.

If specific meals are included in the tuition or fee for a training, conference, or meeting, the per diem shall be reduced based on the GSA meals and incidentals breakdown located on the [GSA Meals and Incidentals Breakdown](#) web page (GSA, 2024c).

Travel Advance

Approved travel and training requests shall be routed to the administrative specialist. Upon receipt of an approved travel and training request, the administrative specialist will provide a check to members traveling on district business to cover the in-lieu payments for meals and incidentals as specified in this SOG (i.e., per diem check). Members must document their travel in support of this advance through receipts for travel, lodging, and training, conference, or meeting expense.

This advance is in lieu of payment of exact expenses and members do not need to provide receipts for meals and incidentals. Any cost more than the advance for meals and incidentals is the responsibility of the member.

Whenever possible, members should submit training and travel requests one month in advance of schedule training to allow time for processing the per diem check. If the request is submitted later than one month in advance, the member may need to pay their per diem expenses and receive their check upon completion of travel.

Expense Documentation

Training and travel expenses must be documented with detailed receipts and mileage record (if requesting mileage reimbursement) attached to the approved travel and training request and returned to the finance officer within 6 days of the completion of training and/or travel on district business.

Members who are missing receipts documenting expenses incurred on behalf of the district must make a reasonable effort to locate or obtain the receipt. If unable to do so, members must complete and sign a missing receipt declaration (see Standard Operating Guideline (SOG) 1.3.2 Procurement (ECFR, 2024).

Expenses Reimbursed or Paid by a Non-District Entity

If travel and/or training expenses are paid by a non-district entity, the member must clearly identify the source and amount of the training and travel expense that are being paid (e.g., conference fee, travel, or lodging paid for a member speaking at the conference). In no case, may a member accept payment of travel and/or training expenses that would create or create the appearance of a conflict of interest.

Pay Status and Compensation

Full and part-time employees shall be considered in pay status if participation in the training activity is required by the district or if the training is within the scope of the employee's current classification specification, or if the training takes place during the employee's normal work hours.

Training activity meeting all of the following criteria is not compensable:

- Training occurs outside normal work hours.
- Attendance is voluntary.
- The employee does not perform district related work while engaged in the training activity.
- The training or educational activity is not within the scope of the employees' current classification specification (i.e., required).
- Any credit coursework taken towards completion of an academic degree or certificate.

Granting of administrative (training) leave during normal work hours for an otherwise non-compensable training activity, does not make the balance of that activity compensable.

Volunteers participating in external training activity shall receive units of training credit as specified in *Standard Operating Guideline (SOG) 1.2.10 Volunteer Activity Standard and Stipend Program* (ECFR, Under Development).

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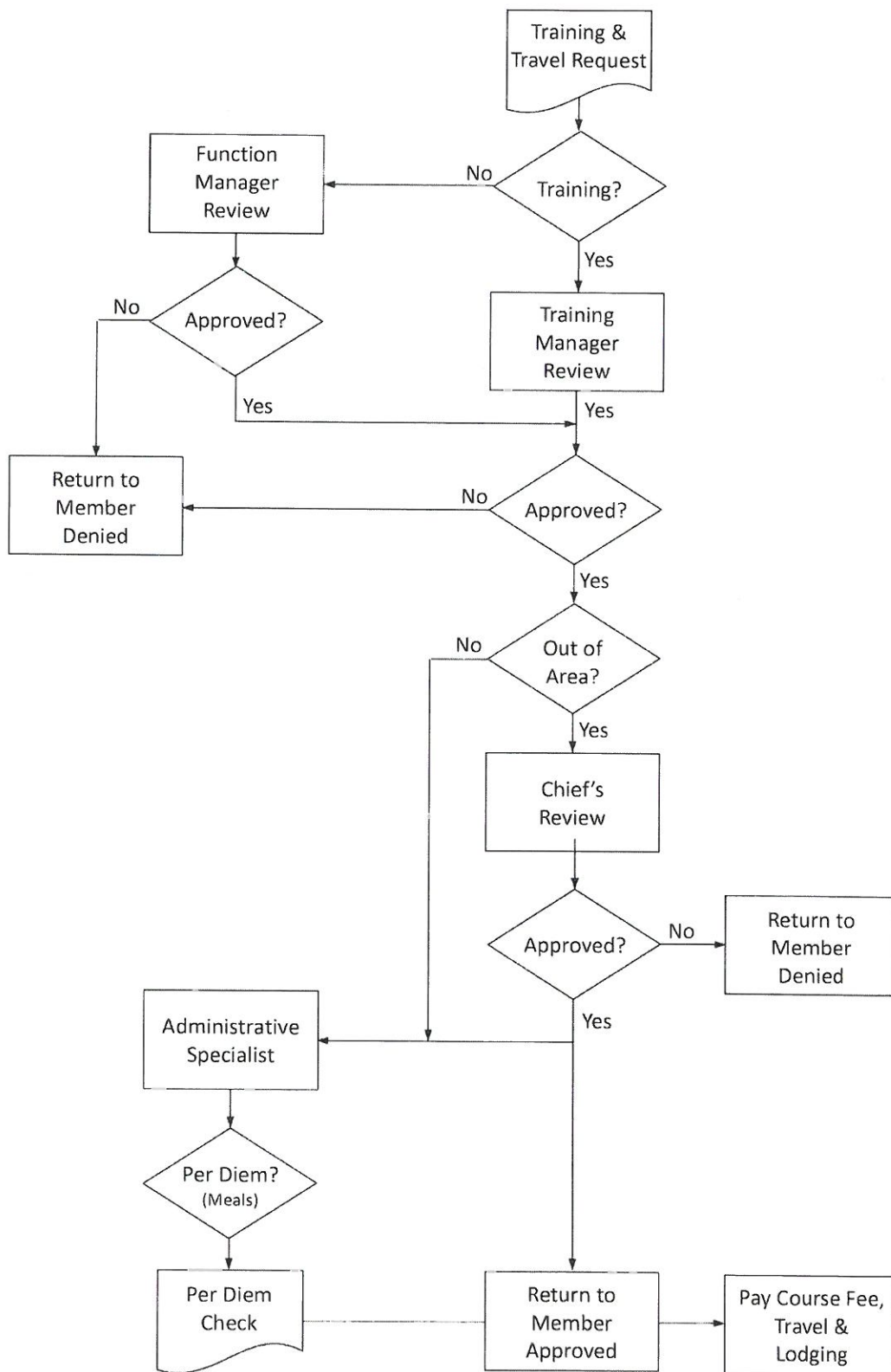
Travel and Training Request

A travel and training request form (see Appendix B) shall be completed and approved prior to the following types of activities:

- Any external training requiring district payment of a registration fee.
- Any external training requiring (or potentially requiring) payment of wages or overtime.
- All non-local travel.
- Any local travel requiring payment for lodging or meals.

Authorized expenses will be specifically identified on the travel and training request, expenses outside those authorized shall be the responsibility of the member attending training and/or traveling on district business. Under exigent circumstances (e.g., flight delays, weather emergencies), members may receive verbal approval from the fire chief or administrative specialist for expenses beyond those authorized on the travel and training request.

Figure 1. Travel and Training Request Processing Flow Chart



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References

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Appendix Travel and Training Request



East County Fire and Rescue

600 NE 267th Avenue Camas, WA 98607

(360) 834-4908 (phone)

(360) 835-8920 (fax)

www.ecfr.us



Training and Travel Request

Section 1 – Course Information and Budget			
Name	Job Title	Division	Date of Request / /
Course Title		Course Date(s) / / to / /	
Sponsoring Organization/Agency		Location	
Individual benefit (Briefly describe how this training will benefit your professional development)			
Learning Transfer (Outline how you will share the information obtained with other members of the District.)			
Materials and Services		Personal Services	
Registration Fee		Hours (ST)	
Other (Specify)		Hours (OT)	
Sub Total		Partial Call Shifts (potentially) Required (Dates and Times)	
Budget Line Item:		Full Call Shifts (potentially) Required (Dates)	
Lodging		Alternate Work Schedule	
Per Diem (Meals)		Off Shift (Date and Time)	
Travel (Specify Mode)		On Shift (Date and Time)	
<input type="checkbox"/> District Vehicle <input type="checkbox"/> Private Vehicle		<input type="checkbox"/> Overtime Approved	
<input type="checkbox"/> Air(Specify)			
Sub Total			
Budget Line Item:		Budget Line Item (OT):	

TRAINING AND TRAVEL REQUEST

Section 1 – Course Information and Budget (Continued)

Training costs indicated with "EXT" were funded from an external source (Specify amount and source)

Section 2a – Approval

Recommendation

Yes No By:

Approval

Yes No By:

Section 2b – Non-Local Travel

Justification

Funds are budgeted for this specific travel

Fire Chief Approval

Yes No By: Chief Ed Hartin

This is a substitute for budgeted travel (Explain)

Section 3 – Completion

Course Evaluation Completed (Date)

Transfer of Training Completed (Date)

If approved to attend, I will share the information obtained as outlined in Section 1 – Transfer of Training. By submitting this request, I agree to modify my work schedule in accordance with the collective bargaining agreement and the *Standard Operating Guideline (SOG) 1.2.5 Modified Work Schedule (Full-Time IAFF Employees Only)*.