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**DATE:** December 12, 2024

**TO:** South Bay Workforce Investment Board, South Bay Workforce Investment Board, Inc., South Bay One-Stop Business & Career Centers, Youth Programs, Special Projects, Contractors and Partners

**SUBJECT:** **DIRECTIVE NO. 24-04**  
**TRAVEL AND BUSINESS EXPENSE REIMBURSEMENT POLICY**

### PURPOSE

Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of the non-Federal entity. Such costs may be charged on an actual cost basis, on a per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to an entire trip and not to selected days of the trip, and results in charges consistent with those normally allowed in like circumstances in the non-Federal entity's non-federally-funded activities and in accordance with non-Federal entity's written travel reimbursement policies. Grant recipients are required to have a policy or procedure in place for travel costs if they have such expenses. [2 CFR 200.475]

### SCOPE

This directive applies to South Bay Workforce Investment Board, South Bay Workforce Investment Board, Inc., South Bay One-Stop Business & Career Centers, Youth Programs, Special Projects, Contractors and Partners.

### EFFECTIVE DATE

The directive is effective immediately.

### REFERENCES

**2 CFR 200.475**

### STATE-IMPOSED REQUIREMENTS

The attached directive contains and complies with state-federal requirements.

### ACTION

Notify all affected parties of the attached directive.

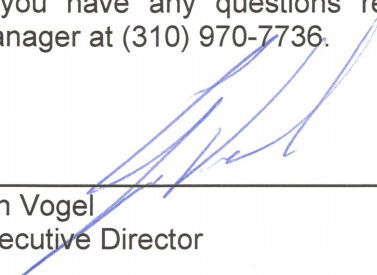
JAN VOGEL  
**EXECUTIVE DIRECTOR**

**FILING INSTRUCTIONS**

This directive replaces the guidelines issued for Travel and Business Expense Reimbursement dated July 2018. Retain this directive until further notice.

**INQUIRIES**

If you have any questions regarding this directive, please contact the Compliance Manager at (310) 970-7736.



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Jan Vogel  
Executive Director

Attachment:

*The SBWIB is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities*

## **Travel and Business Expense Reimbursement Policy**

(SBWIB, Inc. Accounting Policies and Procedures)

The purpose of these guidelines are to establish procedures in the approval of travel, meals and other business related expenses eligible for reimbursement by the South Bay Workforce Investment Board, Inc., (SBWIB, Inc.). These guidelines are designed to ensure consistency in reimbursing employees for reasonable and necessary travel expenses, provided advance approval is obtained in accordance with this procedure.

Travelers will be reimbursed only for allowable expenses deemed to be in the best interest of the SBWIB. This policy applies to all travel regardless of the source of the funds.

The SBWIB, Inc. established the following Travel Policy:

### **Travel Expenses for Non-Employees**

Travel expense reimbursement for individuals other than SBWIB employees, such as board members, guest speakers and consultants are subject to this policy.

### **Local and Extended Travel**

Local travel shall include any trip within the Los Angeles, Orange, Ventura, Riverside or San Bernardino counties (which does not require an overnight stay.) Generally, no lodging expense or advance travel will be paid. Mileage will be reimbursed in accordance to the annual Internal Revenue Service's standard mileage reimbursement rate. Other expenses such as reasonable meal costs and/or parking may also be submitted for reimbursement.

Extended travel shall include any trip, conference or meeting which require the presence of an employee for more than one day and requires air, automobile or rail travel. Travel can be authorized to be paid for meetings of one day or less requiring air travel but no overnight stay. Lodging expenses shall be reimbursed for extended travel. Lodging cost will not be paid if the location of the conference or training program and the schedule of meeting permit travel home each night within a reasonable time. A determination concerning this allowance should be sought from the CEO/Executive Director by the employee prior to incurring any expense.

### **Travel Time**

Authorized travel time shall be based on time required by the most appropriate mode of transportation. Should an employee desire travel time in excess of the above, such time shall be considered and accounted for as vacation or compensatory time off.

### **Approval Procedures**

To be eligible for reimbursement, all travel must be requested and approved in advance. Extended travel should be programmatically approved by departmental Manager as well as fiscally approved by Finance Manager or designee and by the SBWIB, Inc. Chief Executive Officer. The travel normally should be made no less than two weeks in advance to allow for approval and processing. Generally, airfare and other transportation costs are much lower if reservations are made at least two or more weeks in advance. A travel and expense report



should be filed soon as possible after travel is completed. It is the responsibility of the individual filing the travel and expense report to assure the accuracy of the report, the appropriateness of the expenses, and compliance with all aspects of this policy. Reference: **Guideline for Reimbursable Expenses**

### **Relationship to Assignment**

To qualify for approval, travel must bear a reasonable relationship to the employee's job responsibilities. Examples of appropriate travel include, but are not limited to:

- Participation in local, State and Department of Labor (DOL) activities, professional conference, seminars or other job training programs relevant to the employee's assignment.
- Official representation of the organization at meetings or events that the City will not pay for expenses incurred in the performance of any legal representation, whether compensated or uncompensated, for any other institution, organization, firm, agency or individual.

### **Eligibility of Employees on Leave**

Normally, employees are not eligible for expense reimbursement while on unpaid leave of absence from the organization, unless the employee is requested to represent the organization at a professional meeting, event or other activity.

### **Transportation**

The payment of travel expenses for domestic and international travel will be based upon the following considerations:

- The mode of travel should be the most economical means reasonably possible. However, if time and convenience of the traveler and time away from the organization cause a traveler to select a mode of travel other than the most economical, those factors will be considered in the computation of reimbursement.
- Reimbursement for air, rail, automobile rental car, rideshare and taxicabs (may include Lyft and Uber) must be evidenced by original receipts issued by the carrier.

#### *Automobile:*

- For approved travel, use of the traveler's automobile will be reimbursed per mile in accordance to the currently approved Internal Revenue Service's standard mileage rate.
- Parking cost, bridge tolls and turnpike tolls will be reimbursed if properly substantiated by receipts.
- Privately owned vehicle usage must include adequate primary liability insurance for bodily injury and property damage the responsibility of the vehicle owner because the company cannot provide primary coverage.



#### *Automated Rental:*

Rental of an automobile is permitted when necessary for an employee to travel on behalf of the SBWIB. Such rental of an automobile will be allowed and reimbursed on the following basis:

- A traveler is expected to rent a mid-size or smaller vehicle unless a larger car is necessitated by the number of bags and /or travelers in the group.
- Gasoline charges on a rental car will be reimbursed with submission of an original receipt and the rental agreement.
- Reimbursement for rental cars will be made promptly upon submission of a Travel Expense Report for the trip, documented by an original rental agreement. Credit cards receipts are not sufficient for reimbursement.

#### *Airlines:*

Traveling by air is limited to tourist/coach class. The SBWIB will not pay for first-class or business class fares unless the SBWIB requires the employee to make an unscheduled trip on an emergency basis and no tourist/coach class tickets are available. Only the customer's airline ticket (or electronic ticket receipt) serves as a receipt for air travel, not itinerary.

#### *Rail:*

Rail travel should be by coach class, unless overnight travel is involved. Only the customer's rail ticket serves as receipt.

#### *Taxicab/Airport Shuttles:*

Taxicabs, rideshare or airport shuttle travel, where appropriate, will be reimbursed if properly substantiated by the original receipt. Air shuttles or buses should be used whenever possible if they are less expensive than taxis.

### **Lodging**

Travelers are expected to utilize economical accommodations, including but not limited to the following:

- Reimbursement for lodging may not exceed the normal rate for a standard room. If an individual is attending a convention or conference, use of the convention or conference hotel is appropriate, but not required.
- Traveler should request the lower corporate or education institution rate where available.
- Reimbursement request must be documented by an original itemized hotel bill and receipt and is limited to room and tax (if required).
- Business phone calls and one personal phone call home (of reasonable duration), per day, if away overnight.
- The sales tax exemption should be requested if applicable.

### **Meals**

Meals must be purchased at a reasonable cost during business related travel to be reimbursed. *Meals may be subject to a per diem rate.* Tips/gratuities may be reimbursed within

the custom and ordinary percentage applicable to the time of the purchase not to exceed a maximum of 20%. **Amounts over 20% will not be reimbursed.**

### Approved Per Diem Rates

The approved per diem rate as applied below is for reimbursement of costs for an individual attending an approved convention or conference or business event. Reimbursements will not exceed the daily per diem rates allowed. The per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to an entire trip and not to selected days of the trip, and results in charges consistent with those normally allowed

### Travel, Meals and Incidental Expenses Example - 2024 Los Angeles:

M&IE	M&IE Total
Breakfast/Continental Breakfast	\$17
Lunch	\$18
Dinner	\$34
Incidentals	\$5
Total (daily)	\$74
Flight	At Cost *
Hotel / Lodging	At Cost *
Ground Transportation	At Cost
*SBWIB will assist to make and pre-pay costs associated with Airline and Hotel; all others arrangements will follow daily lodging rates (excluding taxes) and allowance.	

All rates are subject to the current M&IE rates established by U.S. General Services Administration. SBWIB will follow the annual M&IE rates for approval. [Per diem rates | GSA](#)

### Non-reimbursable Travel or Business Related Expenses

All requests are subject to being denied if the expenses are deemed unnecessary and/or unrelated to the purpose of the travel or business. The below non-reimbursable items are not to be considered all-inclusive, and a rule of reasonableness may be applied by the Executive Director/CEO.

Examples include but are not limited to:

- Motel/hotel video rental;
- One employee buying another lunch (unless SBWIB business is being conducted during the lunch);
- A department taking employees to lunch unless attendance or participation of meeting or event is required by company;
- Office parties;
- Fines for parking or traffic violations;
- Repair or insurance of personal automobiles;
- Theft loss and damage of personal luggage and effects;

- Membership dues in private or social clubs and organizations not related to the organization;
- Personal expense, e.g., barber, laundry, entertainment and phone calls; (cell phone cost may be reimbursed if employee is required to use personal cell to make work related calls, especially while away on a business related trip. If an individual is away overnight, one personal phone call home per day from the hotel, of reasonable duration, will be reimbursed. If the individual is away for more than five days, laundry will be reimbursed.);
- Passenger insurance, e.g., flight insurance;
- Alcohol beverages purchased for any purpose, including travel, will not be reimbursed;
- Entertainment expenses in which an employee is involved are not otherwise justified as a necessary travel and/or meeting expense(s) will not be reimbursed.

### **Receipts**

All claims for reimbursement of the expense items listed must be documented by the original receipted bill or by a vendor-certified copy of the receipted bill. Photocopies, credit card receipts, or facsimile copies are accepted only in unusual circumstances. Transportation by airline, railroad, rental automobile, taxi, rideshare, airport shuttle; parking and tolls; accommodations for hotel or motel; meals (unless per diem is issued), registrations; attached official printed receipt, or canceled check and copy of literature itemizing fees.); supplies and miscellaneous expenses (e.g., a long distance telephone charge which did not originate from a SBWIB telephone).

### **Submission of Travel/Expense Report**

Employees must sign and submit their Travel Expense Report to the appropriate person no later than 30 days after the end of the individual trips. Employees risk the chance of not being reimbursed when submitting late reports.