

Travel & Per Diem

Definition

All travel expenses must adhere to current California Department of Human Resources (CalHR) [travel reimbursements guidelines](#), which apply to contractors as well as subcontractors.

Contract-Approved Travel

- Any required trainings, conferences and meetings are 100% allowable for all staff on the approved budget, unless otherwise indicated in the contract, and do not need pre-approval.
- No proration is necessary for contract-required trainings, conferences or meetings.

When Pre-Approval is Required

Written pre-approval by your program analyst is necessary in the following situations:

- Before all travel not noted in the contract and included in the Budget Justification
- For staff not listed in the contract
- For lodging rates exceeding CalHR travel reimbursements guidelines
- For conferences where CalFresh Outreach content is less than 100% of the conference schedule
- For out-of-state travel, must be one of the following (rarely approved):
 - USDA required
 - A staff person must be receiving an award or recognition for CalFresh Outreach efforts
 - A staff person is a guest or keynote speaker/presenter on the topic of CalFresh Outreach

When requesting pre-approval for a non-contract travel expense, send the following in an e-mail to your program analyst 30 days prior to the travel:

- The name(s), title(s) and %FTE(s) of the staff who will travel
- The name of, or a description of, the event to be attended
- An explanation how the event relates to CalFresh Outreach and fulfilling your Scope of Work
- A copy of the event agenda or link to a web-posting of the event agenda
- The total projected cost of the event
- Date(s) of the event
- A statement that there are funds available in your Travel and Per Diem budget to cover anticipated expenses.

When to Prorate

- Expenses exceeding CalHR guidelines (not pre-approved in writing by the program analyst) are capped at the maximum CalHR allowable amounts
- All trainings, conferences or meetings not contract-required involve proration:
 - A meeting agenda must be submitted to the program analyst
 - The program analyst will determine the percentage of the meeting devoted to CalFresh Outreach
 - Total allowable travel expenses will be prorated by **both** the percent FTE of the attendee and the percentage of CalFresh Outreach content attributable to the meeting.

Example:

A 50% FTE project coordinator will be attending a workshop on Children's Health and CalFresh. The program analyst determines that CalFresh Outreach-related content is 50%. Total expenses for the trip are \$400. The reimbursable amount would be \$100 (\$400 x 50% FTE x 50% program content).

Documenting Travel

You and your subcontractors must create and maintain a travel log, available for review by CDSS, for each staff person that is traveling. The documentation must include:

- Name and title of the person traveling
- Date(s) of travel
- Start and end time of travel (determines qualified meals and incidentals)
- Purpose and location of the trip
- Meeting agenda
- Mileage log (a Google map can suffice)
- Any receipts associated with the trip (e.g. airline, hotel, parking, gas, etc.).

Forms and Links

- CalHR Travel Guidelines
<http://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx>
- Sample Travel Expense Claim
<http://www.documents.dgs.ca.gov/osp/pdf/std262.pdf>
- Excess Lodging Rate Approval Request
<http://www.documents.dgs.ca.gov/osp/pdf/std255c.pdf>