

### **A.38 COUNCIL OFFICE TRAVEL, TRAINING, AND CAPACITY BUILDING (11/2024)**

*“Government is a trust, and the officers of the government are trustees; and both the trust and the trustees are created for the benefit of the people.”*

- Henry Clay, Speech at Ashland, Kentucky, March 1829

The Council Office follows the City’s travel policy found in Title 53, Chapter 23 of the *Salt Lake City Policies and Procedures Manual* (City Policy). The following policy is specific to the Council Office and Council Members. City Policy is referenced in multiple places throughout this policy. Any updates to the City Policy affecting excerpts quoted here will be incorporated accordingly. Unless otherwise specified here, City Policy applies. This policy supersedes the City policy in cases where the policies may differ. This policy is subject to revision over time.

#### **a. Policy Basis for the City Council’s Travel, Training and Capacity Building Approach:**

1. The City Council finds that a well-informed City Council is important to the success of Salt Lake City, and that high quality and readily accessible learning opportunities are essential, due to the complex and significant decisions Council Members face.
2. The Council further finds that participating in local educational and networking opportunities, traveling to conventions where there is an opportunity to hear from and converse with experts, meet peers from other cities, make site visits to see programs being implemented, and participate in national learning opportunities are the most efficient ways for Council Members to obtain and expand City-related knowledge.
3. The Council bases its conclusions on the following:
  - A. The Legislative Branch of Salt Lake City government has formal legal responsibilities to the organization of Salt Lake City and directly to the taxpayers.
  - B. City Council Members are elected from the general population and come to the position with differing sets of expertise that can most effectively benefit taxpayers if Council Members can apply their personal knowledge and philosophies to the context of local government.
  - C. Council Members must make important decisions starting their first week and intensifying within their first six months in office. They could be faced with bonding, zoning, budgeting, and policy and oversight decisions within hours of taking office. The State Legislature begins voting on issues that can significantly affect the City approximately two weeks after new Council Members are sworn in. The Council will evaluate, refine and adopt a City budget composed of billions of dollars within the first six months of being in office.
  - D. Local office may be a Council Member's first direct association with a governmental entity. Government service has different transparency, ethical, fiscal and legal obligations from those in the private sector. Council Members must gain and retain a strong working knowledge of those requirements throughout their term in office.
  - E. As the Capital City of Utah and as a business, medical, cultural, governmental, and educational hub in the Intermountain West, Salt Lake City faces unique opportunities and challenges.
  - F. Constituents, property owners and business operators rely upon elected officials to be current with best practices and innovative approaches to problem solving.

- G. It is more cost-effective to learn from the successes and failures of other cities than to reinvent them. Learning from those with experience increases the odds of successful implementation for Salt Lake City.
  - H. Personally observing how a program operates in another City is a valuable learning experience; it allows one to consider how the situation is the same or different than Salt Lake City, and helps identify potential improvements and avoid potential pitfalls. Direct discussions with on-site experts can provide first-hand background information and advice.
- b. **Purpose:** City Policy Ch.23 2.4 states, “Travel will be approved only to transact official business, attend official and professional meetings, and participate in conferences and training sessions necessary to promote the efficient conduct of the City’s affairs.”

It is the Salt Lake City Council’s policy that the conferences and meetings it funds:

1. Are consistent with legal requirements and Salt Lake City’s missions, objectives, and policies;
2. Represent an efficient and effective use of taxpayer funds; and be able to withstand public scrutiny.

Participants in travel funded by City taxpayers must conduct business, including conferences and meetings, consistent with these tenets. Meeting attendance shall be for the purpose of education, information and the exchange of experiences in municipal operations. Council Members traveling to other cities and attending conferences is a benefit to taxpayers, and lessons learned will result in better development and services for residents.

- c. **Ethics Statement:** That public office is a public trust has long been a guiding principle of government. Travel outside of the City is a cost to taxpayers, and merits close scrutiny by the public. By adoption of this policy, the Council has established accountability standards that tie the expenditure of taxpayer funds to achieving the public purpose the travel is intended to meet. To uphold this trust, the City Council has bound itself to abide by certain standards of conduct.

**Council Members should:**

1. Conduct themselves at all times in a manner that reflects credibly on the Council;
2. Abide by the spirit as well as the letter of the City and Council Policies;
3. Adhere to the ethical standards expressed here and in the Council’s Code of Conduct;
4. Adhere to the Utah Open and Public Meetings Act (OPMA) by avoiding policy, budget and issue conversations in contexts that should legally be conducted in by the Council with a quorum present in an open and public meeting.
5. Carefully balance the opportunity to learn from other cities with the duty to not hold any official or policy discussion in which a majority of the Council Members are present.

- d. **Definitions.** For the purposes of this section, the following definitions shall apply unless the context clearly indicates or requires a different meaning. Definitions set forth in the Salt Lake Policies and Procedures manual also apply here.

1. **ABBREVIATED TRAVEL.** Attendance at a conference or convention where the registrant will not attend all the days offered and must depart early or arrive late.
2. **ELIGIBLE EXPENSE.** An expense for which the City may provide reimbursement, or a Council Member may use a City travel credit card, as outlined here and in Salt Lake City Policies and Procedures Title 53, Chapter 23, Section 5.
3. **ENTERTAINMENT.** Excepting entertainment included in the base registration for an event, includes, but is not limited to, shows, amusements, theaters, circuses, sporting events, or any other place of public or private entertainment or amusement.

4. GRATUITY/TIP. Voluntary payment in excess of baseline charge for meals, services or transportation.
  5. GUEST. A personal companion or relative who is not eligible for taxpayer-funded travel.
  6. INCIDENTAL EXPENSES. Include fees and gratuities paid to hospitality workers, baggage handlers, and others.
  7. OPEN AND PUBLIC MEETINGS ACT (OPMA). State law Title 52 Chapter 4, governing transparency and noticing requirements for meetings of public bodies.
  8. PER DIEM. Meaning “per day,” per diem is provided to travelers as an allowance for meals and incidental expenses and calculated according to federal standards.
  9. PUBLIC BUSINESS. A public purpose which is required or useful for the benefit of the city to carry out the responsibilities of City business.
  10. REASONABLE COST. City Policy Ch. 23 3.12: “Least costly means of accomplishing business objectives, considering the nature and purpose of travel, the value of the traveling employee’s time, and the reputation of the City.”
  11. TRAVEL. Any expenditure directly incident to official travel by employees and officers of the City or by wards or charges of the City involving reimbursement to travelers or direct payment to private agencies providing transportation or related services.
  12. TRAVEL EXPENSE APPROVING OFFICIAL/AUTHORITY: The City Council Executive Director is the travel expense approving official for City Council staff members who are traveling on City business. The City Council Chair and Vice Chair and, if requested, the full City Council, will serve as the travel expense approving authority for City Council Members who are traveling on City business.
  13. TRAVELER. Any Council or staff member traveling on behalf of the City, using taxpayer funding.
- e. **Policy:** Council Members may travel to conferences and conventions related to City business. When traveling, Council Members are expected to extract maximum value from the conference/trip and will attend as many sessions/tours as practicable, particularly sessions that directly relate to issues facing Salt Lake City.
1. All Travelers must adhere to federal, state, and local laws governing taxpayer-funded travel.
  2. City Policy Ch. 23 4.1G: “Any Traveler accepting complimentary trips shall comply with the City’s conflict of interest ordinance.”
  3. City Policy Ch. 23 Ch.23 4., as revised below:
    - A. “All employees responsible for traveling decisions and approving travel requests shall make fiscally responsible choices.
    - B. Approving Officials shall exercise due diligence to ensure that expenses associated with travel are reasonable and necessary for the conduct of City business and are within budgetary limits and in compliance with this Policy.
    - C. All travel requests must be screened to limit trips, the number of individuals traveling, places to be visited, itineraries, and durations to those that are essential to the performance of the Council’s (Department) mission.
    - D. Authorization for travel is limited to and shall only be approved for conferences, trainings, conventions, and other functions from which the City derives a specific benefit through attendance by the Traveler. As reasonably and operationally practicable, Travelers and Approving Officials shall consider other means of

participation for training-related and other functions such as webinars or conference calls in lieu of traveling.

- E. Any expenses submitted for reimbursement may be reviewed and rejected by the Finance Department for noncompliance of this Policy. All decisions are final.”
- 4. Open and Public Meetings Act (OPMA) Considerations: Council Members’ City-sponsored travel often falls within two broad categories: large, national conferences with attendance ranging from hundreds to thousands, and smaller conventions and fact-finding trips with a few dozen attendees.
  - A. Large professional conferences are widely recognized as allowed, even if a quorum of the Council members attend the conference because:
    - 1. Council Members are participating with a large group of elected officials from throughout the country, state or region. The conversation is not Salt Lake City specific;
    - 2. It is not likely that a majority of the Salt Lake City Council Members would attend the same workshop, since multiple options are offered at the same time and Council Members are not and should not meet as a quorum to discuss policy matters impacting the City;
    - 3. There is generally no interaction that could be considered lobbying or advocacy from any entity or individuals, particularly any entity or individuals who have been or will be before the City Council with a request for action; and
    - 4. Council Members select sessions to attend from among a variety of sessions. There is no expectation from sponsors for the Council Members to attend a particular session or event.
  - B. For smaller conferences, the Council has identified criteria to ensure a quorum of Council Members can attend without violating OPMA and to facilitate their attendance at the function in a way that is open and transparent. Council staff can communicate with organizers and hosts to request accommodation for these criteria. Council Members can reasonably attend events that:
    - 1. Are open to participation for a wide range of people, rather than limited to a list of invited participants, either officially or as a result of limited focus and exposure/availability of information about the conference;
    - 2. Are priced within the range of professional conferences, so that the attendance is not prohibitive for all but limited segments of the population to attend;
    - 3. Are publicly announced at least four months in advance, to allow interested parties to make arrangements to attend;
    - 4. Allow news media attendance; and
    - 5. Make outreach efforts to include historically disadvantaged representatives in the travel.
  - C. Occasions where the Council should seek guidance from legal counsel include invitations from organizations or hosts/sponsors that:
    - 1. have had a request for action before the City Council in the past year;
    - 2. reasonably expect to have a request for action before the City Council in the next one to two years;

3. have representatives in attendance at the function who will participate in the conference and interact with elected officials;
  4. have an expectation that the Council, either individually or as a quorum, will engage in conversations that relate directly to City business at the function, outside of an open and public meeting;
  5. have an expectation that they will have time and communication opportunities with the Council Members beyond the time that they would have if they were not sponsoring the trip; or
  6. provide one or more informational or educational sessions that align with the position of the sponsors or host and do not include information or education opportunities that provide opposing points of view or pros and cons relating to the subject.
5. National Travel: Pre-authorized conventions are:
1. National League of Cities (NLC) – Congressional City Conference; Washington, D.C.
  2. National League of Cities – City Summit; Location rotates
  3. Utah League of Cities and Towns (ULCT), Mid-Year Conference; St. George
  4. Downtown Alliance – Urban Exploration
  5. American Planning Association (APA) Annual Conference
  6. Mpace Transit + Community Annual Conference
- B. Any and all Council Members may attend the ULCT conference in St. George and the NLC conference in Washington, D.C.
- C. The remaining conferences are limited to three Council Members per trip. This minimizes transparency and OPMA concerns. If more than three wish to attend the same conference, Council Members who have attended fewer conferences in a calendar year or have attended the conference in question least recently shall be given priority to attend the conference.
- D. When a Council Member expresses interest in traveling to a conference, convention or seminar, beyond the pre-authorized opportunities, Council staff will prepare information for the briefing session, and a motion for the Formal Meeting, to be considered under “New Business.”
- E. If a Council Member has scheduling limitations that preclude them from being in the convention city for the full conference, they are encouraged to weigh the benefits that can be experienced during an abbreviated trip, and travel only if they determine that the taxpayers will still receive value for the investment of the travel funds. The Chair may determine that an abbreviated trip is acceptable if a Council Member is asked to represent Salt Lake City to accept an award when others are not available to represent Salt Lake City.
6. International Travel: International travel is not typically part of the Council's travel, training and capacity-building program. Rare exceptions may be made by the Council, after a public discussion reviewing the benefits of the travel to the City taxpayers. Travel limitations outlined elsewhere in this policy may be waived by the Council when evaluating the benefit to the taxpayers in the case of participation with a board on which a Council Member serves as part of his/her official duties to the City. No international trips are preapproved. Rare occasions where it is appropriate for Council Members to travel

internationally in the performance of their duties include the list below. If such an occasion arises, each Council Member may be permitted one international trip per elected term. Staff typically does not accompany Council Members on international trips; exceptions may be determined by the Council Staff Executive Director.

- A. Sister City Delegations
- B. Olympic Host City duties
- C. State-sponsored trips

7. Staff: Since the Council is committed to a well-trained professional staff, the Council budgets for one conference approximately every year per professional staff person within existing budgetary constraints, as work schedules allow and with approval of the Executive Director. Special circumstances for professional required education and travel specific to job assignment and Council Member support needs will be considered by the Director.

f. **Council Member Travel Expenses:**

1. City Policy Ch. 23 4.2A: “All employees responsible for traveling decisions and approving travel requests shall make fiscally responsible choices.”
2. City Council Members sometimes represent Salt Lake City Corporation, and therefore the City taxpayers, on boards established by the State of Utah or other organizations. To keep the public records abundantly clear that the Council Member represents the interests of the City taxpayers in their service on the board, the Council Member shall not travel at the expense of the State or other organization to which the Board relates.
3. Upon consent of the Council majority, Members may travel to conferences, conventions or seminars at the expense of the Council Office.
4. Staff will follow the Americans with Disabilities Act (ADA) and arrange accommodations consistent with formal documentation provided to the City.
5. When traveling on City-related business, the office coordinates and directly pays for registration, flights and hotel arrangements, and advances funds for Meals and Incidental Expenses (M&IE), following federal standards for per diem rates. Any other eligible expenses such as transportation may be paid using a City travel credit card, with receipts retained and provided to the Council Office upon the conclusion of the trip.
  - A. Gratuities and Incidentals. Guidelines on reimbursable gratuities are below:
    1. ADA Assistance: A gratuity paid based upon assistance or an accommodation necessitated by a documented disabling condition is reimbursable. (Airport wheelchair assistance, handling of a wheelchair or other assistive device, etc.)
    2. Meals: Tips/gratuities for meals are included in the Federal calculation of the meal expense, so travelers will not be reimbursed for those expenses.
    3. Transportation (Taxi, Van, Ride-Hail, Rideshare): Travelers may be reimbursed for a tip/gratuity of up to 20 percent paid to the transportation provider. Tip amounts beyond 20 percent are considered a personal expense and are not reimbursed.
      - a. Additional charges or gratuity for multiple passengers:
        - i. A gratuity or incremental charge for personal guests or transportation with peers while not on official City business is a personal expense and is not reimbursed.

- ii. A gratuity or incremental charge paid so that others from the City or related organizations can share a ride is reimbursable, so long as the ride destination is specifically tied to a City public purpose. (Airport to and from the hotel, traveling together to a conference on-site seminar or tour, etc.)
  - 4. Courtesy Transportation: Tips for courtesy transportation services are reimbursable (hotel shuttle).
  - 5. Hotel Staff: Tips to hotel staff are not reimbursable because the Federal Government includes incidentals in the per diem calculation. (Incidentals are defined as tips/gratuities, hotel business center copying/scanner/printer/ fax charges, baggage services, laundry, etc.)
  - 6. Use of the business center for projects on behalf of the City is reimbursable, and a gratuity for expedited service or assistance would be reimbursable.
  - 7. Package, Shipping Receipt, Mail Service: travelers may need to pick up something that has been shipped to the hotel for official City business. A gratuity is typically paid to the mail room and is reimbursable.
  - 8. Concierge Services:
    - a. A gratuity for advice on a restaurant, entertainment, or direction is a discretionary personal expense that is not reimbursable.
    - b. A gratuity to a concierge whose assistance is urgently needed to achieve a City public purpose may be reimbursable and can be considered for reimbursement on a case-by-case. Examples may include finding a location for experts and a group of City representatives to converse or contacting delivery services to arrange for a last-minute delivery of City materials. Council Members can rely upon Council staff, rather than a concierge, for most situations of this nature.
- B. City Policy Ch. 23 Section 5 excerpts: “Meals via Per Diem & Cash Advance:
- A. All meal and incidental expenses will be provided on a per diem basis in the event of overnight travel. Per diem rates are established by the GSA for federal travel conducted in the CONUS and internationally.
    - i. For the first or last day of travel, a Traveler is limited to 75% of the applicable per diem rate for meals and incidental expenses. However, if the Traveler leaves before 9:00 am or the Traveler returns after 6:00 pm on the first or last day, the Traveler is eligible for 100% of per diem for those days. ...
  - ... E. Personal meals must not to be purchased on a City credit card. ...
  - ... I. The Traveler shall return the per diem cash advance within ten days after the travel is cancelled or changed. The Traveler must submit a cash receipt showing proof of payment. When cash is not returned immediately, the City may deduct the amount of the per diem cash advance from the Traveler’s wages.
  - J. The Traveler is responsible for any cash per diem that is lost or stolen.”

- C. City Policy advises prorating a traveler’s per diem based on whether group meals are provided, but in the case of Council Office travelers, many factors may affect whether travelers will be available for group mealtimes that are included as part of conference registration or hotel registration. The Council therefore finds that it is cost-effective to provide the full per diem to travelers and not attempt to adjust the dollar amount both before and after the fact based on other provided meals. The time to administer that process exceeds any potential savings to the taxpayers.
- D. Group Meals: As a gesture of goodwill toward officials from other cities, Council Members may find it appropriate to organize a meal for collaboration with these officials. In these cases, the City may pay for the meal and gratuity for all in attendance, within the following parameters:
  - 1. A City traveler can pay for the group meal, within the following parameters:
    - a. No liquor can be paid for by the City. Participants can ask for a separate beer and liquor bill and pay the cost personally.
    - b. Occasionally, public officials travel with a guest. If the dinner or lunch is held during a time that would otherwise be free from conference activities, officials are significantly more likely to attend if their guest can join them. It is in the City’s interest to facilitate conversations among officials; therefore, it is also in the City’s interest to cover the dinner costs for the guest. It should be noted that it is rare for the City to cover a cost for a guest; dinner with other officials is an exception.
    - c. Avoid exclusive or high-end specialty venues. As a rule of thumb, a restaurant with a quiet group seating area is justified; extravagant restaurants or restaurant fare would not be acceptable use of taxpayer funds.
    - d. As the meal for city travelers is covered by the daily per diem, the traveler is required to return the amount designated by the formula for the meal. This can be accomplished with staff when the travel is settled.
    - e. The individual who pays for the meal may use a City credit card or may request reimbursement. They shall provide the Council Office with the itemized receipt, a list of all attendees; and a note identifying the public purpose of the function.
    - f. City travelers having a meal together without the above justification of networking benefits with other parties should each pay their own meal cost.
- 6. City Policy Ch. 23 5.5 B-C: “Trips that bundle lodging, meal, and other travel costs are not allowable under this Policy unless approved by the Finance Department upon demonstration by the Traveler that the cost of the bundled trip does not exceed the component costs of the trip as allowed under this Policy. In cases where breakfast is included in the room price, it shall be stated in the per diem worksheet. Non-mandatory hotel related fees for bundled services (such as resort fees or health club fees) are not City-approved costs unless at least one of the bundled services related to the

- fee is essential for conducting City business. Mandatory hotel related fees will be reimbursed with submission of itemized receipt.”
7. City Policy Ch. 23 5.1 D: “Lodging must be evaluated to minimize unnecessary travel at the destination and to reduce the impacts of the lodging itself.”
  8. Transportation expenses: City Policy Ch. 23 2.5 states: “The Traveler must secure the most reasonable means of travel to balance cost, travel time and work requirements”
    - A. When considering transportation, the Council Office is to choose and/or reimburse for the fastest practical option for the nature and purpose of the official business, and shall not book a flight without approval by the Council Member. Council Members are encouraged to respond promptly to options provided by the staff to preserve the opportunity to get reasonable fare. Other staff considerations for booking should include:
      - a. Total cost (actual transportation costs, per diem costs, overtime expenses, and lost time from work)
      - b. Number of stops and length of layovers
    - B. Travelers who do not travel by the transport identified by the Council Office are responsible for any additional expenses.
    - C. The City will only cover the cost of essential expenses for official City business.
    - D. Travelers are personally responsible for the travel expenses over the reimbursement limits, such as personal delays, circuitous routes, luxury lodgings, or services unnecessary or unjustified in the performance of official business.
    - E. Travelers who travel by an indirect route or interrupt a direct route for personal convenience may only receive reimbursement equivalent to the cost of traveling by the direct, uninterrupted route and must personally pay for any additional expenses.
    - F. In general, City travelers must fly coach class at government expense on both local and international official travel. Employees may upgrade to first class or business class at personal expense, including by using their frequent flyer miles.
  9. Group Transportation: City Policy Ch. 23 5.1 C: “Carpooling, public transit, or shuttle buses must be considered for all group travel. Travelers are strongly encouraged to choose the lowest cost for ground transportation taking into consideration reasonable travel time and other related cost factors such as parking.”
    - A. Occasionally City travelers find it more convenient for one person to cover the cost of the group’s transportation to a venue. This can be accommodated if the City travelers provide documentation.
      1. Staff will determine whether the particular transportation expense was anticipated and included in each traveler’s advance, or was an expense eligible for City credit card use or reimbursement.
      2. For transportation costs estimated and provided to the City traveler in advance, a corresponding reduction will be applied for those who received the advance but did not incur the expense when the travel settlement is calculated.
      3. For transportation costs not advanced to travelers, a City traveler who paid the expense personally will be reimbursed once a receipt and list of passengers is submitted and reviewed for public benefit.

4. For transportation expenses paid by a City traveler on the City travel card, the City traveler is responsible for providing the receipt and list of passengers when the travel concludes.
  5. The City can't cover the transportation cost of personal guests.
  6. The City can only cover the cost of transporting travelers to official functions. Transportation to social or entertainment functions is a personal expense.
  7. As noted elsewhere in this policy, a gratuity of up to 20 percent may be paid by the City for transportation services.
8. Air Transportation: City Policy Ch. 23 5.4 excerpts:
- a. "A.i Air travel must be by commercial airline. Travelers traveling on City business by scheduled air carrier shall use the Salt Lake City International Airport ("SLC Int'l Airport") as the point of departure and return. ...
  - b. ... A.iii The City will pay only the costs for the most direct route necessary to accomplish the purpose of the City travel on the lowest cost flight(s) available. The City will not pay expenses resulting from indirect travel routes or for arriving earlier and leaving later than necessary to conduct official business. Adjustments will be made for any of these types of expenses to ensure that the City is not incurring additional costs.
    - a. The City will not pay extra fees or upgrade costs of any kind.
    - b. Coach or economy class seating is considered the standard class of travel. The City will not cover the cost of First Class.
    - c. Excess baggage charges will not be reimbursed. The City will cover the cost of one checked bag only.
    - d. Early boarding fees or other upgraded convenience fees will not be covered by the City.
    - e. Costs to change or re-book a flight will be borne solely by the Traveler, unless the change in flight is driven by business necessity as documented in a memo signed by the Traveler's Department Director. Changes made without written preapproval are at the Traveler's expense."
10. Deviations from approved travel expenses: Council Members may request changes to the travel itinerary or cancellation of all travel plans.
- A. Any per diem funds advanced to Council Members for travel will be returned to the City if the travel is canceled.
  - B. City Policy Ch. 23 5.4 A.v: "When a trip is cancelled and the Traveler receives credit for the value of the airfare, the employee should use that credit for future City travel. If a Traveler receives a credit for any travel purchase, they must use the credit for other City related business travel. The credit may not be used for personal use. If an employee leaves City employment the credit must be paid back to the City."
  - C. City Policy Ch. 23 4.1.E: "Any additional costs to the Traveler related to traveling in advance or extending the stay beyond the time necessary to attend the approved

conference, training, convention, and other function will not be reimbursed or paid by the City. The Traveler must make separate reservations and may not charge such additional cost to the City credit card.” In the event of such additional costs incurred to the City without written preapproval, the Council Member is responsible for paying these charges or reimbursing the City.

- D. If Council Member is unable to attend a conference they have been registered for, delays arrival in the convention city, or leaves before originally scheduled, the Council Member should report the situation immediately to the Council Chair and/or Council Executive Director so that steps can be taken to attempt to mitigate the loss of taxpayer funds. When appropriate, best efforts shall be made by staff to offer the opportunity to another Council Member or staff before canceling reservations or flights.
  - 1. If a circumstance arises where the City is charged for expenses that are not used by the Council Member due to late arrival or early departure, the expense will be charged to the Council Member.
- E. In the event of cancelations or travel costs due to a personal emergency or extenuating circumstance not easily addressed using this policy, it will be referred, through the Council Chair to the full Council for resolution.

11. Reimbursement. If a traveler incurs non-eligible expense incidentals on a City travel card, the traveler shall reimburse the City within five business days of returning from travel.

- A. For traveler reimbursement requests or charges that are not routine, Council staff will:
  - 1. Identify the relevant sections of the Council Policy and the Salt Lake City Policies and Procedures, and provide that information to the traveler.
  - 2. If further review is requested by the City Council Member, Council staff will inform the Chair and Executive Director of the request, and seek Guidance of the City Attorney and Finance Director on legal and fiscal requirements.
  - 3. Provide the legal or fiscal requirements or advice received from the City Attorney and Finance Director to the requesting Council Member and the Chair and Executive Director
  - 4. If further review is requested by the Council Member, the Council Member should make a written request to the Chair and Executive Director, detailing their request in the context of the City Council policy, City policy, legal or fiscal requirements, and advice of the City Attorney and Finance Director.
  - 5. The requesting Council Member may appeal the decision to the full Council for a determination by majority vote.

- B. Guests. Council Members and Council staff may invite guests to join them on official City travel:
  - 1. All associated expenses for the guest must be paid with personal funds.
  - 2. Council staff should not be involved in making any arrangements for guests.
  - 3. Most conferences have a clear policy about guests; many offer separate registration options to allow participation in meals, tours and special events. City attendees should refer to conference materials for guest

registration information and will pay any registration costs for the guest personally.

4. Conferences expect all attendees, including guests, to adhere to standards of conduct. This includes respecting the event's policies, other attendees, and the venue to ensure a respectful and safe environment for all.
5. Any misconduct on the part of a guest can reflect poorly on the City and on the hosting traveler.
6. The presence of guests should not detract from the focus on City business.

12. Transparency and documentation:

- A. All travel documents, receipts, conference agendas and other documentation are publicly accessible records.
- B. City Policy Ch. 23 5.5 D: "D. Travelers shall submit an itemized receipt as provided at motel/hotel check-out. Booking receipts for lodging are not acceptable forms of documentation."
- C. City Policy Ch. 23 4.1F-J:
  - "F. A Traveler shall document all allowable and authorized travel-related expenditures with itemized (line-item detail) receipts, invoices, or other supporting documentation. If documentation is missing, the Traveler shall write a letter to the Finance Department approved by the Department Director explaining the reason a receipt is not available. The City shall not reimburse Travelers for unauthorized travel expenditures. Any unauthorized travel charges on a City credit card will require immediate reimbursement to the City and will result in an automatic 30-day suspension of all City credit cards held by that Traveler.
  - G. Any Traveler accepting complimentary trips shall comply with the City's conflict of interest ordinance.
  - H. For group expenditures incurred by one Traveler, the affected Traveler shall submit with the receipts an itemized breakdown of expenses for each Traveler in the group.
  - I. When actual expenditures exceed 10% of the original estimated expenses, the Traveler shall attach a written explanation within five business days after the end of the travel period.
  - J. All international travel must be approved in writing using the international approval form identified in the travel procedures.

g. **Accountability:** This Travel Policy is in place to provide accountability to Travelers. Non-compliance may affect future travel opportunities. Because choices made by Council Members reflect upon the full Council and Salt Lake City government, the Council may elect to act in accordance with the Council's Code of Conduct policy should problems arise. Additional remedies include:

1. Charging the Council Member for all or a portion of the travel if the public purpose was not met,
2. Taking other action deemed appropriate by a majority of the Council.

h. **Implementation:** This document must be included in the regular orientations for Council Members and Council staff. Council Members entering office shall sign the attached statement affirming that the Council Member read and understood this policy. This policy is in effect regardless of a Council Member's execution of the statement. The Council will receive annual

training on this policy in conjunction with either open meetings training or the Council's annual retreat. Council Members are encouraged to indicate which conferences they plan to attend at that training so staff can monitor travel pricing and take advantage of early registration discounts.