



**SAN JOAQUIN COUNTY WORKNET
 EMPLOYMENT AND ECONOMIC DEVELOPMENT DEPARTMENT
 POLICIES AND PROCEDURES DIRECTIVE**

DIRECTIVE NO.	EFFECTIVE DATE	APPLICABILITY	PAGE
24-06	August 15, 2024	Departmental	1 of 4
SUBJECT: TRAVEL REQUESTS			

I. PURPOSE

The purpose of this directive is to provide guidance and establish procedures for the processing and approval of in-State travel requests of up to \$1,000 per person and out-of-State travel requests of up to \$5,000 per person.

II. GENERAL INFORMATION

This PPD is designed to align with and adhere to the overarching requirements established by County policy as outlined in the San Joaquin County Administrative Manual, Section 3500, which sets the requirements for travel, transportation, and meals. EEDD will maintain procedures in strict accordance with County policy.

This PPD supersedes PPD D-35 Travel Requests (Rev. 1), dated November 4, 2022.

References

- San Joaquin County Administrative Manual, Section 3500, Transportation, Travel & Meals

III. POLICY

It is the administrative policy of EEDD that the guidelines and procedures included herein will govern the authorization and approval of in-state travel requests, of up to \$1,000 per person and out-of-state travel requests of up to \$5,000 per person, as identified under Section II. General Information above.

A. TRAVEL OUTSIDE THE STATE

1. Travel outside the State of California is normally discouraged. When such travel is considered in the best interest of the county, specific approval must be obtained via a Travel Request form in advance from

the Board of Supervisors when the per employee cost of the trip (regardless of funding source) is over \$5000 or from the County Administrator when the per employee County cost of the trip is \$5000 or less.

2. Trips to the Tahoe basin, Reno, or Las Vegas are considered under the in-state policies.

B. TRAVEL OUTSIDE THE COUNTY

1. Travel to a facility owned and operated by the County of San Joaquin located outside the County will be considered as travel within the County.
2. Except for one-day trips, requests for the Executive Director to attend an out-of-county meeting will be approved by the County Administrator (or designee). The name of the individual responsible for the departmental functions during the Executive Director's absence should be indicated.
3. Out-of-County travel on one-day trips do not require a Travel Request form where the following provisions apply:
 - a. The travel is required by the department in the performance of its normal functions and is in the course of the employee's regularly assigned duties.
 - b. The maximum duration of the trip is one day.
 - c. Transportation by County vehicle, private vehicle, ride-share service or public transit (BART, ACE, light rail, etc.).
 - d. Total expenses other than mileage reimbursement for use of private vehicle do not exceed \$100. Mileage will be reimbursed based on the shortest route, regardless of the actual route taken.
 - e. There is no lodging expense.
4. Adequate records of Out-of-County one day trips must be kept so that the necessity of the trip can be audited.

C. Travel Outside the United States

1. All travel outside of the United States for any County purpose, regardless of cost or funding, will require prior approval by the Board of Supervisors.

IV. PROCEDURE

A. In-State Travel Requests of Up to \$1,000 Per Person

1. The requesting manager will submit a memorandum to the Executive Director which must include the purpose, destination, names of the

proposed attendees, the cost per person and the total cost to be charged to each funding source.

2. The Executive Director will review the travel request memorandum, determine the reasonableness and necessity of the travel and either approve or deny the travel request.
 3. If approved, the memorandum will be signed by the Executive Director and a [Travel Request form](#) (See Attachment 1) will be completed by the Department Travel Coordinator (if over one-day). The approved travel request and memorandum will be returned to the requesting manager.
 4. The requesting manager will submit the signed memorandum and Travel Request form to the Fiscal staff, along with a Request for Goods and Services (RGS) form. The Fiscal staff will code the travel cost to the benefiting funding sources and process the request.
 5. Fiscal staff will maintain a log of all travel requests above the previous \$250 department authority. The log will include the date(s) of the travel, destination, attending employees, purpose, cost per person, and the total cost of the travel.
 6. The Travel Log will be made available to the County Administrator's Office at their request.
- B. In-State Travel Above \$1,000 & Out-of-State travel of up to \$5,000 Per Person
1. EEDD staff will follow procedures 1-4 listed in Section A. above.
 2. In addition to Section A. procedures 1-4, the Travel Request form will be forwarded, along with the approved departmental memorandum and other supporting documentation, to the designated CAO Analyst for review and approval by the County Administrator.
 3. Upon approval, the designated CAO Analyst will forward the Travel Request form back to EEDD Fiscal staff. The Fiscal staff/Travel Coordinator will then proceed with the necessary travel arrangements.
- C. Out-of-State travel above \$5,000 per person will require authorization from the San Joaquin County Board of Supervisors, requiring the submission of an agenda item for Board action.

V. QUESTIONS REGARDING THIS DIRECTIVE

May be referred to the Executive Director of EEDD via Managers or designee.

VI. UPDATE RESPONSIBILITY

The Executive Director of EEDD and/or designee will be responsible for updating this directive, as appropriate.

VII. APPROVED



PATRICIA VIRGEN
EXECUTIVE DIRECTOR

PV:df

Attachment 1: Travel Request Form

**COUNTY OF SAN JOAQUIN
TRAVEL REQUEST (TR)**

Budget Unit _____	<input type="checkbox"/> Amended TR	TR # _____
1. COUNTY DEPARTMENT/AGENCY _____	2. DATE _____	
3. NAME(S) & TITLE(S) OF EMPLOYEE(S) _____	# of emp <input style="width:50px;" type="text"/>	4. TRAVEL DATES AND TIMES
		START _____
		END _____

5. REASON FOR TRIP (Name of event) _____

6. LOCATION (City, State) _____

7. TRANSPORTATION (Check all that apply)
 County Car Private Car Air Rail Bus Other: BART/Uber/Lyft/taxi/shuttle

8. ESTIMATED EXPENDITURE FOR THIS TRIP ENTER NUMBERS IN HIGHLIGHTED CELLS

Transportation	\$	0.00	= miles at .67/mile:	# of miles	<input style="background-color: #d9ead3;" type="text" value="0.00"/>	airfare:	<input style="background-color: #d9ead3;" type="text"/>	other:	<input style="background-color: #d9ead3;" type="text"/>
Meals	\$	0.00	=	2024 maximum reimbursement rates for meals					
				B - \$17 x	<input style="background-color: #d9ead3;" type="text"/>	L - \$18 x	<input style="background-color: #d9ead3;" type="text"/>	D - \$34 x	<input style="background-color: #d9ead3;" type="text"/>
				Total B	<input style="background-color: #d9ead3;" type="text" value="0"/>	Total L	<input style="background-color: #d9ead3;" type="text" value="0"/>	Total D	<input style="background-color: #d9ead3;" type="text" value="0"/>
Lodging	\$		=	_____					
Registration	\$		=	_____					
Other costs	\$		=	_____					
TOTAL	\$	0.00							

9. REQUEST FOR ADVANCE (Minimum \$50/ Maximum \$2,000 per employee)
 (Show advance calculation)

Meals	\$	0.00					
Lodging	\$	0.00		\$	_____		
Other*	\$	0.00					
TOTAL	\$	0.00		x 75% = \$	0.00		

*Exclude registration fee to be prepaid by Auditor-Controller.

10. DEPARTMENT HEAD APPROVAL

I hereby certify that this trip is for official County business and that funds are available in the Department's budget.

Signed _____
 Department Head (or designee) Date _____

COUNTY ADMINISTRATOR (or designee)

In-state travel \$1,000 - \$5,000/employee and out-of-state \$0 - \$5,000/employee requires prior approval of the CAO. Travel above \$5,000/employee requires prior approval of the BOS.

Signature	Date	Comments:
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BOARD OF SUPERVISORS

I HEREBY CERTIFY that the above order was passed and adopted on by the following vote of the Board of Supervisor to wit:

AYES:

NOES:

ABSENTS:

 Clerk of the Board of Supervisors,
 County of San Joaquin
 State of California

By _____
 Deputy Clerk