

State of California

MEMORANDUM

TO: Personnel Management Liaisons
Travel and Relocation Liaisons

REFERENCE CODE: MM86-01
EFFECTIVE DATE: Continuing Policy
EXPIRATION DATE: Indefinite
DATE OF ISSUE: July 17, 1986
REVISED: June 1990

SUBJECT: Travel Expenses of Non-State Employees

The following guidelines should be used to determine the documents needed and the proper reimbursement rates for travel expenses incurred by board and commission members, volunteers, consultants and attendants to the handicapped.

Statutory Board Members are individuals appointed to serve on boards or commissions established by law. Members are appointed by the Governor, Legislature or Department Head. Headquarters for these board members are established by the appointing authority and a copy sent to the State Controller's Office. An Oath of Office must be on file with the Secretary of State. Reimbursement for necessary travel expenses is based on the rates for nonrepresented employees.

Non-Statutory Board Members are individuals appointed to serve on boards, commissions or task forces that are created by agency secretaries, department directors, or executive officers on an as-needed basis to fulfill the department's mission. Headquarters for these board members are established by the appointing authority. An Oath of Allegiance is required and both the oath and headquarters record are kept on file at the department. Reimbursement for necessary travel expenses is based on the rates for non-represented employees.

Salaried Consultants are individuals who have a written contract with the State to perform specific duties or consultants with a verbal agreement with a department to provide one-time services in exchange for an honorarium or speaker's fee plus travel expenses. Headquarters for the salaried consultant is established by the department and an Oath of Allegiance is not required. The reimbursement of necessary travel expenses for salaried consultants under contract shall be stated in the contract but shall not exceed the rates established for nonrepresented employees. Salaried consultants under verbal contract will be reimbursed for necessary travel expenses based on the rates for nonrepresented employees.

Non-Salaried Consultants are individuals serving as experts in specialized areas who receive no salary. Since their expertise is only needed for limited periods, a written contract may not be required. Headquarters is established and kept on file with the appointing authority. An Oath of Allegiance or statement of volunteerism is not required. Non-salaried consultants are eligible for necessary travel expenses based on the rates for nonrepresented employees. The non-salaried consultant's travel expense claim should indicate the consultant's non-salaried status.

Civil Service Consultants are individuals hired by the State to perform the duties of a consultant and have civil service status. Headquarters for consultants are established by the appointing authority. The reimbursement of necessary travel expenses will be based on the rates for nonrepresented employees.

Volunteers are individuals who voluntarily perform services for the State without pay. The volunteer must sign an Oath of Allegiance, which is kept on file at the department. Headquarters for volunteers is established by the appointing authority. A statement of volunteerism must be on file with the Audit Division of the State Controller's Office. The statement of volunteerism contains departmental policy regarding the intended use of volunteers and the method of reimbursement of necessary travel expenses. Volunteers will be reimbursed for necessary travel expenses based on rates for nonrepresented employees.

Attendants for Disabled Employees are individuals who are readers, interpreters, drivers or attendants to disabled employees. If no one is available on the State's Support Services Assistant, General or Interpreter lists, the disabled employee can make arrangements for the services required with a person of their own choice, with prior approval of the departmental Personnel Officer. Attendants are entitled to travel expenses equal to the rates allowed the disabled employee. Reimbursement for travel expenses for attendants may be claimed on a travel expense claim which references the services provided and the name of the disabled employee. Other methods of reimbursement of travel expenses for attendants may be determined by the department.

Original signed by
Anne Bersinger, Chief
Personnel Management Division