**PART III**

**CSL MEMBER RESPONSIBILITIES**

**Page**

* DUTIES AND RESPONSIBILITIES………………………………………………….. 1
* CALIFORNIA FOUNDATION ON AGING…………………………………………. 1
* COOPORATION AT THE STATE LEVEL…………………………………………. 2
* Code of Ethics…….......................................................................................... 3
* Statement of Commitments………………………………………………………. 5
* WORKING WITH LOCAL ORGANIZATIONS ON PUBLIC RELATIONS............ 7
* Initial Contact............................................................................................... 7
* Suggested Contacts ................................................................................... 7
* Get on the Program..................................................................................... 8
* Know Your Facts……….............................................................................. 8
  + Highlights…………….................................................................................. 8
  + HOW TO PROMOTE THE CA SENIOR LEGISLATURE 9

Introduction 9

Booking Recommendations 9

CSL Presentation 10

Presentation Tips 10

* + ANNUAL SCHEDULE OF SUGGESTED ACTIVITIES…………………………… 11
  + CSL STATIONARY AND BUSINESS CARDS…………………………………….. 15
  + TRAVEL EXPENSE CLAIM GUIDE POLICY……………………………………… 16

I. How to Report Your Travel Time……………………………………………… 16

II. Claim Requirements……………………………………………………………. 16

III. Travel Expense Reimbursements and Rates……………………………….. 16

* WHAT GOES ON THE TRAVEL EXPENSE CLAIM…………………………………. 19

**CALIFORNIA SENIOR LEGISLATURE**

**MEMBER RESPONSIBILITIES**

**I. Duties and Responsibilities**

1. CSL Members - Each member of the CSL is expected to subscribe to the Code of Ethics (Attachment A) and the Statement of Commitment (Attachment B). Please read them carefully.

2. Speaking as a Private Citizen - Members may represent themselves as members of the CSL but must indicate that their views are theirs alone unless authorized to speak on behalf of the CSL. Care must be taken not to involve the CSL in partisan politics.

3. Name Badge and CSL Identification Pins - A permanent name badge and CSL pin are provided to each CSL member. Any member with an illegible or broken name badge may return it to the office and receive a free replacement. Lost badges are replaced or new pins are furnished at members’ expense at current cost.

**II. California Foundation on Aging Fund – Tax ID #77-0187875**

1. The “California Foundation on Aging Fund (CFOA),” a private non-profit beneficial corporation [501(c)(3), allows the CSL to have some financial flexibility.

2. While the California Fund for Senior Citizens (CFSC) Code 402, the yearly State Income Tax Check-off, is still the primary source of revenue for the CSL, other fundraising activities have been instituted to help offset costs. The Annual Sessions could not have been held over the past few years without these added donations to the CSL.

3. This CSL fundraising campaign is a year-round effort and we provide “gift” envelopes specifically designed to solicit special contributions from potential donors.

4. These contributions are primarily generated by hardworking CSL members who push this effort throughout the year, but particularly between April 16 and the October Annual Session. Members are asked to participate in the fundraising drive for the CFOA/CSL fund.

5. The JRC members, as well as all CSL members and staff, play a significant role in getting contributions for this fund via targeted mailings and direct solicitations to small businesses and large corporations.

6. Working together, staff and CSL members have made an impact on getting contributions. CSL members take seriously their responsibility for helping with this very important CSL special fundraising effort.

7. Between April 15th and the annual session, members are asked to participate in the fundraising drive for the CFOA/CSL fund.

8. Checks are made payable to: “CFOA/CSL.” All donations are tax-deductible as charitable contributions.

9. Each member’s role in this CSL fundraising includes contacting his/her state assembly member and senator to ask if he/she can count on them for an ad in the Annual Session Program Book.

10. CSL members should also contact their congressional member, local businesses and friends to purchase ads in the Annual Session Program Book.

11. Checks for advertisements should be made payable to the “CFOA/CSL Fund.”

**III. Cooperation at the State Level**

1. The more the CSL, California Association of Area Agencies on Aging (C4A), and TACC work together, the more we accomplish.

2. Each CSL member must take responsibility for making cooperation work in his/her area.

**CODE OF ETHICS**

Attachment A

Recognizing that the needs of the over 60 age groups are in the interests of all people, the California Legislature in 1980 created the California Senior Legislature to propose legislation to meet the needs and concerns of Older Californians.

Members of the Senior Legislature elected by their peers are cognizant of their obligation to discharge the responsibility given to them by the State Legislature, and vow to follow the path of high moral conduct and service implicit in the following code:

1. As a volunteer, I realize that I am subject to a code of ethics similar to that which binds the professional in the field in which I work.

2. I accept the plural ethnicity of California Senior Legislature members, their cultural and educational variations. I will value the commitment of each as much as I do my own, and show respect to each and CSL staff.

3. I will show respect to the members of the State Legislature and their staff people.

4. I will work faithfully to accomplish the objectives of the California Senior Legislature.

5. I will work with the Area Agency on Aging and/or Legislative Council and other seniors in my community to develop proposals for legislation addressing their concerns.

6. I will strive to maintain the dignity of the Senior Legislature in all my speaking engagements and written articles. I will not use my CSL title for any personal gain or represent myself as a Senior Legislator at non-approved CSL events.

7. I will be responsible for informing the public as widely as possible concerning the CSL in a positive manner.

8. I recognize and accept the administrative policies, responsibilities, and procedural concepts of the California Senior Legislature and the State of California as they are enunciated in the CSL Procedures Manual and Bylaws, including the use and design of CSL business cards and stationery.

9. I promise to bring to my work with the California Senior Legislature an attitude of open-mindedness; to be willing to be trained for it; to bring to it interest and attention; and to work in support of CSL programs and priorities.

10. I will attend the annual session of the California Senior Legislature unless excused because of illness or death of a family member or other legitimate reasons.

11. Furthermore, I promise to conduct my campaign for office as either a Senior Senator or Senior Assembly Member in an ethical, above-board and honest manner, in both my oral and printed campaign statements. An in no way will I mislead or deceive potential elderly voters while campaigning.

12. I promise not to use my office as a CSL member in any manner that reflects negatively on the high moral standards of the CSL, or negatively on any CSL member.

13. I accept and promise to comply with the STATEMENT OF COMMITMENT.

Being eager to contribute all that I can to the improvement and solution of senior problems I accept this code, to be followed carefully and cheerfully.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**STATEMENT OF COMMITMENT**

Attachment B

Responsibilities of Members of the

California Senior Legislature (a)

Note: This is to be signed by the candidate and attached to her or his application.

1. Shall promote CSL fund-raising activities on a local and statewide level.

2. Shall be non-partisan.

3. Shall represent the best interests of California’s elderly population.

4. Shall express the major concerns of the elderly.

5. Shall speak for the CSL on CSL-approved issues only. Otherwise, shall identify myself as a CSL member expressing own personal views.

6. Shall use only CSL - authorized cards and stationery.

7. Shall identify myself as “Senior Senator” or “Senior Assembly Member” or “Senior Assemblywoman” or “Senior Assemblyman.”

8. Shall accept the responsibility for submitting at least one proposal for an Annual Session.

9. Shall accept the responsibility for attending and participating in all meetings of the Annual Session, except when an extreme emergency arises.

10. Shall develop working relationships in my PSA (Planning and Service Area) with the Area Agency on Aging, the Advisory Council or Commission on Aging and other senior groups and caucuses; and shall attend their meetings whenever possible.

11. Shall develop working relationships with my State and National Legislators and their staffs, particularly with my Legislators’ District’s staffs.

12. Shall develop and maintain a local legislative advocacy program, keeping up a two-way communication with my constituents.

13. Shall activate letter and email campaigns to support CSL priority proposals.

14. Shall respond to calls (Alerts) from the Joint Rules Committee (JRC) to write letters, make phone calls, and visit my State Legislators and their District offices on behalf of CSL priority issues.

15. Shall develop and carry out local public relations and publicity for goals established by the CSL.

16. Shall study the Annual Schedule of Suggested Activities and follow this schedule whenever its items are applicable to my local situation.

1. In general, failure to live up to the STATEMENT OF COMMITTMENT and the CODE OF ETHICS is grounds for review, reprimand and possible removal from office by JRC Executive Committee action.
2. In order to meet the funding needs of CSL for travel and reimbursement of expenses of the Annual General Session and for meetings, each member shall endeavor to raise funds throughout the year.
3. Failure to submit at least one proposal in any one of two consecutive years constitutes failure to live up to this commitment.

To Be Signed by the Candidate:

I have carefully read the responsibilities of members elected to the California Senior Legislature, and I fully intend to follow them to the best of my ability if I am elected by my peers.

I understand that there is no salary connected with this office and that board, room and transportation costs will be furnished for the Annual Session, provided that funds are available. I further understand that the expenses for postage, telephone and travel during the year are my responsibility.

Print or Type Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**HOW TO WORK WITH LOCAL ORGANIZATIONS**

**ON PUBLIC RELATIONS**

**Initial Contact**

Use your existing contacts – call the people you know who are members of local organizations.

Explain what the CSL is and how, as a member of the CSL you can be of service to your community.

Offer to make a presentation to the organization – be as flexible as you can be on the date and time of your presentation - your purpose is to be seen and heard!

To reach other organizations where you don't have a contact, you might ask your local newspapers or study your local telephone book, or the numerous other resources you should have available to you (like the AAA), for the names and addresses of the organizations' presidents.

**Suggested Contacts**

In addition to the ones mentioned earlier, you might want to contact organizations and agencies such as:

|  |  |
| --- | --- |
| * League of Women Voters | * City Council, Mayor, etc. |
| * Rotary | * Nursing Homes |
| * Kiwanis | * Unions (Retiree Groups) |
| * Lions | * Professional Clubs |
| * Masons | * Soroptimists |
| * Retiree Organizations | * Senior Centers |
| * Women’s Clubs | * Mobile Home Parks |
| * Bridge Clubs | * Grandparents Clubs |
| * State & Local Representatives | * Bridge Clubs |
|  |  |

**Get on the Program**

* Ask to be on the agenda
* Be flexible with the length of your presentation – typically 10-20 Minutes
* Have “hand outs” ready for your audience CSL brochures, Code 402 Cards and other CSL Marketing/Promotional Material.
* Be sure to thank your hosts for inviting you and allowing you to be on the program.

**Know Your Facts**

* + - * CSL History
      * Function
      * Legislative Priorities
      * Legislative Success Rate
      * Funding – California Fund for Senior Citizens (Code 402) or the California Foundation on Aging (CFoA)

**Highlights**

CSL is non-partisan

We work together with many other organizations and the State Legislature

Working for the benefit of all older Californians

CSL members are volunteers and oftentimes spend their own funds to carry out the CSL’s work.

**HOW TO PROMOTE THE CALIFORNIA SENIOR LEGISLATURE**

**INTRODUCTION**

Working within your community to promote the CSL should not be that difficult. If you are a member of your County Commission/Council on Aging, you have multiple resources from which to draw. For example, members of the Commission/Council have contacts in the Community. Could be fraternal organizations, senior centers, other community and faith based organizations, retiree groups, AARP chapter, CARA, private clubs, political organizations, other county committees, county providers of services to the aging population are just an example of opportunities to reach out. Also, the CSL office in Sacramento has a PowerPoint presentation that can be used. The office can also provide “402 cards”, CSL brochures, Fact Sheet, and donation envelopes.

Another option would be to join statewide organizations that have large member groups. For example, the Aging Alliance is an organization that is part of the Center of Excellence for Elder Abuse at University of California, Irvine. There are hundreds of members statewide that could be useful in spreading the word about the CSL. Join listserves that are nationwide. An example would be the Elder Abuse listserve [ELDERABUSE@LIST.NIH.GOV](mailto:ELDERABUSE@LIST.NIH.GOV). This could prove very useful when doing research on a proposal idea.

Another very successful idea is to get to know your county Board of Supervisors, as a minimum, their Chief of Staff. They publish newsletters to constituents reporting on programs and events being conducted. This is a good way to advertise your event after you have booked a date and time.

**BOOKING RECOMMENDATIONS**

Once you have a date established, here are some guidelines that should be helpful:

* Establish date and time for the presentation. Request at least one hour.
* Note the Name and Address of the host organization and contact info (phone, email)
* How many people are expected to attend? Important so that you provide enough handouts.
* Determine if any officials will be attending the event and get their names.
* Determine parking considerations.
* Find out if the event is open to the public.
* Will there be volunteers in attendance who can help hand out material?
* Make sure a representative of the venue is present to handle any technical issues.
* Find out who will be introducing the speaker.
* Determine what audio/visual equipment is available. Podium? Microphone? Projector? Screen? Computer?
* Find out how presentation is going to be promoted. Flyer? Word of mouth? Press Release? Newsletter?

**CSL PRESENTATION**

The PowerPoint presentation was designed to provide just about anything a person needs to know about the organization. If you are not using the PowerPoint presentation about the CSL, include the following information as a minimum.

* First, find out by a show of hands how many attendees have ever heard of the CSL! This could help in understanding the level of knowledge of attendees.
* History of the organization…how and when it was established
* Information about members of the CSL: age, reps from all over the state, number of senior senators and senior assemblymembers
* CSL governance – describe the Joint Rules and Legislative Committees and provide a brief description of the policy subcommittees
* Describe the purpose of the CSL and the prime responsibilities of members: research and write legislative proposals and raise funds to sustain the organization
* Briefly describe the legislative process…deadline for submittal and a little about what happens after the submittal
* Describe succinctly what happens during the four days in Sacramento during our annual session
* Spend a few minutes describing where CSL members get proposal ideas
* Discuss what happens when a proposal finds an author and a little about the process after that. This could include description of the role of the Legislative Committee and “Walk-the-Halls” process.
* Be sure to highlight our successes. Identify proposals that have been chaptered. The CSL Marketing and Public Relations Resource Manual has copies of this information.
* Use this opportunity to solicit proposal ideas for attendees. Let them know the kind of issues we consider for proposals and invite them to submit to you after the presentation. Utilize the “There Oughta Be A Law” form in the CSL Marketing and Public Relations Resource Manual.
* Emphasize that the CSL members are not lobbyists! We are advocates for the aging population.
* Let attendees know how the CSL is funded. Emphasize we are not funded out of the State General Fund! Let them know how they can help via tax form or cash/check donation.

**PRESENTATION TIPS**

Speaking in front of a room full of people can be a very intimidating experience to many people. If making a presentation is uncomfortable for you, perhaps there is a CSL colleague in your area who would be more comfortable. Spend time before your presentation getting very familiar with content. Make this presentation in front of family, for example, to get more comfortable with the material you will be presenting.

The following represent some ideas to make your presentation go a lot smoother.

* Arrive at venue at least 30 minutes ahead of your presentation. This will enable you to know the layout of the room, setup of podium, mic, and any other equipment you have arranged for.
* Good idea to have water with you.
* Before you begin your presentation, do a sound/hearing check. Even if using a microphone, speak to the audience to determine if you are speaking loud enough, or too loud. Understand that many attendees may have a hearing issues, so using a mic is imperative!
* Take a minute to describe the handouts you have brought with you. Emphasize the CSL website as a place to get additional information.
* If using the PowerPoint, make sure you have a hard copy in front of you. Do not turn your back to the audience to read off the screen. If you are not using the PowerPoint, place the hard copy of your presentation on the podium to read from.
* Do not read line for line off of your script. Know your material well enough so that you can look up and get eye contact with attendees. This will help you to understand if they are “getting it”. It is also good to scan the group while presenting which will ensure that you are engaging everyone.
* Speak clearly and don’t rush through the material. Also, do not assume that everyone knows what the acronyms mean. Clarify this.
* Do not hand the mic to anyone in the audience if there are questions. You may not get the mic back. It’s a known fact that someone who has a question, usually has a story to tell that takes up valuable time.
* When a question is asked, repeat it to the entire group, as they may have not heard it. Providing an answer without knowing the question can be annoying to others.
* When providing an answer, address the entire audience, not just the person asking the question. This will ensure that it doesn’t look like you are engaging in a private conversation.
* Keep track of time, or have someone do this for you so that you comply with the allocated schedule.

Making a presentation can be a very enjoyable experience, especially when you realize that the audience understands what you have presented. Be sure to thank everyone for attending and have business cards ready to hand out in case anyone would like to contact you after.

**ANNUAL SCHEDULE OF SUGGESTED ACTIVITIES**

**FOR ALL CSL MEMBERS**

This is only a suggested schedule and is meant to be helpful to you in recognizing timelines and activities you may not think of yourself. You will also need to make such timeline adjustments as your local area situations may require.

**October**

* Study CSL voted proposals, especially top ten State and top four Federal Priorities.
* Study suggested changes to ByLaws in odd numbered years.
* Attend Annual Legislative Session.

**November – December**

* Get the CSL story to media every way possible. Send copies to the CSL office, 1020 N Street, Room 513, Sacramento, CA 95814.
* Set up press conference with local legislators at district offices, especially those who might carry one of our proposals. Emphasize priorities at the press conference.
* Send first press release to local media regarding California Fund for Senior Citizens Campaign for the State Income Tax Return check-off (Code 402).

**January**

* As priorities are authored, get news to local media. Notify the CSL office of success/failure and send original copies of news articles to the office.
* If you wish, follow-up on your own to get authors for priorities above top ten. Notify office of success/failure.
* Public Service Announcement (PSA) models to TV and radio stations on the California Fund for Senior Citizens (Code 402).
* Second press release regarding the California Fund for Senior Citizens.

**February**

* Get local personal and organizational endorsements of as many priorities as possible. Send copies to the CSL office and offices of those state Legislators carrying proposals.
* Send original copies of informational background articles and news clips that you have read pertaining to priority proposals to the CSL office.
* Continue to publicize state check-off of California Fund for Senior Citizens .

**March**

* Advocate for the ten top priorities in all district offices of Legislators in your Planning and Service Area. If in urban setting, work through caucuses and larger groups of CSL members. Include as many other senior organizations as possible.
* Attend legislative hearings when possible.
* Send local organizational/personal letters for priorities to the chair of the appropriate State Legislature policy committee, with copies to the author of the bill and the CSL office.
* Heavy publicity for Tax Check-off on California Fund for Senior Citizens last two weeks of month.

**April**

* Final push prior to April 15 on California Fund for Senior Citizens.
* Advocate any State Legislative member in your area on priorities (IMPORTANT) following JRC and/or Legislative Committee direction. Keep informed about amendments that may alter bill.
* Secure information for writing proposals for new CSL Session from local senior organizations.
* Help your AAA Advisory Council with election needs on appropriate years.
* Final last minute publicity on elections.

**May**

* Every four years, help with CSL elections if appropriate.
* Prepare and submit your CSL legislative proposal(s) by June 1st deadline.
* Help organize groups for visits to Sacramento as necessary to support crucial bills. If Sacramento is not possible, make group visits to local area legislative offices.
* Start (or continue) fundraising efforts on behalf of the CFOA/CSL Fund account.

**June-July**

* Be receptive and helpful if the JRC and/or Legislative Committee asks for extra help on a particular bill. Be ready to advocate your state Legislators, including their district offices. Local legislative staff often has heavy influence.
* Continue fundraising activities on behalf of the CFOA/CSL Fund account.

**August**

* Revisit district offices. Advocate or oppose bills, as per CSL directives.
* Continue working on CFOA/CSL Fund drive.
* Work on getting advertisers for the Annual Session Program book with checks made out to the CFoA/CSL.

**September**

* More of the same as bills come up. Last minute letters, phone calls, visits to legislators and the Governor. Hold in readiness for mass demonstrations in Sacramento, if necessary.
* Media events: newspaper, radio, TV, emphasizing member’s or candidate’s stand on senior issues.
* Publicize upcoming session.
* Study new proposal book thoroughly and ASAP. You don’t have much time. Be prepared.

**Important Ongoing Activities Throughout The Year**

* Visits to senior groups, senior centers, senior activities, advisory councils, commissions on aging, nutrition sites, other senior organizations, city council meetings, board of supervisor meetings, etc. Be sure that these contacts are two-way communication so that you know what your constituency is thinking.
* Letters to Editor. Speeches to any service and local dubs you may belong to about the CSL and its accomplishments.
* Please keep the CSL advised of all your activities, successes, failures and suggestions. Stay in touch with any local CSL members who may also be on the CSL Legislative Committee for supporting ongoing legislation.

**Policy on Use and Design of the CSL**

**Stationery and Business Cards**

The CSL Code of Ethics shall include an item requiring each CSL member to conform to the rules concerning the use and design of the CSL stationery and business cards.

**Use of Official CSL Stationery**

* Each member of the CSL shall use CSL stationery for official business only. Members shall not use this stationery for campaign purposes, for advocating for any person running for office or for any issue that is not supported by the CSL.

**Design of CSL Stationery**

* Stationery shall be used in the form approved by CSL without additional words or symbols except that excerpts from the individual member’s CSL business card may be reproduced on stationery to identify a CSL member. CSL members shall not design their own stationery, except as indicated above.

**Use and Design of the CSL Official Business Card**

* CSL members shall secure their official business cards through the business office of the CSL. Members shall not design their own cards. These cards shall be used for CSL business only.

**TRAVEL EXPENSE CLAIM GUIDE POLICY**

**I. How to report Your Travel Time**

A 24-hour clock (or military time) should be used on all Travel Expense Claims (TEC):

|  |  |
| --- | --- |
| **Example** | |
| 12:01 a.m. | 0001 |
| 5:30 a.m. | 0530 |
| 7:21 a.m. | 0721 |
| 11:00 a.m. | 1100 |
| 5:30 p.m. | 1730 |
| 10:00 p.m. | 2200 |
| 12:30 p.m. | 1230 |

**II. Claim Requirements**

1. Each item of travel expense claimed in the amount of $10.00 or more requires an original receipt excluding meal expenses.

2. Parking expenses require an original receipt if over $10.00.

3. Original receipts for airline tickets and car rentals must be attached to your TEC.

4. Your meals, incidentals and lodging are to be listed in the appropriate column on the TEC.

5. Do not sign blank TEC forms.

6. The use of correction tape or white out correction fluid is NOT acceptable on TECs. If a correction is to be made, draw a line through the error, make the correction, and initial your change.

7. The TEC must have an original signature of the member to be valid.

**III. Travel Expense Reimbursements and Rates**

Travel Expense Reimbursements will be reimbursed following the rules and regulations of the state of California.

1. Meals

a. Breakfast – Up to $7.00

b. Lunch – Up to $11.00

c. Dinner – Up to $23.00

(**Note:** For meal allowances, please refer to items 3 and 4 below.)

2. Lodging

a. Actual lodging cost with substantiating itemized receipt up to a maximum of $90.00 per night plus tax as per state regulations.

b. CSL members who stay with friends or relatives, or do not produce a receipt for a commercial lodging, may be eligible to claim meals only.

c. You may NOT claim lodging within 50 miles of your primary residence without prior approval of the JRC Chair.

d. Lodging shall be reimbursed ONLY with JRC prior approval.

3. 24 Hours of Travel or More

a. On the first day of travel of 24 hours or more, if:

1) Begin travel before 6:00 a.m., you may receive breakfast reimbursement.

2) Begin travel before 11:00 a.m., you may receive lunch reimbursement.

3) Begin travel before 5:00 p.m., you may receive dinner reimbursement.

b. On the last day of travel of more than 24 hours, if:

1) Travel ends after 8:00 a.m., you may receive breakfast reimbursement.

2) Travel ends after 2:00 p.m., you may receive lunch reimbursement.

3) Travel ends after 7:00 p.m., you may receive dinner reimbursement.

4. One-Day Travel Reimbursement

a. Your travel must be less than 24 hours and over 100 miles round trip from your home.

b. If you begin your travel before 6:00 a.m. and ends after 9:00 a.m., you may receive breakfast reimbursement.

c. If you begin your travel after 4:00 p.m., you may receive dinner reimbursement.

5. Incidental Business Expenses

Incidental business expenses such as telephone calls, postage charges, and faxes are allowed up to a maximum of $5.00 in a 24-hour period.

6. Type of Transportation Used

a. When you travel at state expense, the type of transportation shall be that which is in the best interest of the state.

b. If you choose a method of transportation which is more costly than another, a cost comparison shall be made and reimbursement shall be made at the least amount of total cost.

(Example: You drive from San Diego to Sacramento and the mileage cost is $360. The comparable airfare from San Diego to Sacramento is only $140. You will only be reimbursed for the airfare of $140.)

7. Taxi

Taxis should be used for trips of not more than 10 miles. Receipts are required for all taxi expenses.

8. Buses, Shuttles and Public Transportation

Buses, shuttles, and other public transportation should be taken from and to the Sacramento airport.

9. Private Vehicle

a. Everyone who drives a privately-owned vehicle on state business must complete an “Authorization to Use Privately-Owned Vehicle” state standard form 261. This form is to certify that the person has a valid California Driver’s License, has insurance and will wear a seat belt.

b. Private vehicle mileage is claimed at present state regulated rate.

10. Rental Cars

Rental cars are not to be used except in extreme emergency. If a rental car is used, a complete written justification and prior approval by the JRC is required before reimbursement is allowed.

11. Airfare

Airfare with Southwest Airlines should be arranged through the CSL office.

**WHAT GOES ON THE TRAVEL EXPENSE CLAIM**

Trips must be authorized and approved in advance of travel. The most recent Travel Expense Claim Form (STD 262) can be found on the website under forms. Expense claims must contain all the following information:

A. Claimants Name

B. Social Security Number (leave blank)

C. Position Title (leave blank)

D. Identification Code “CB/ID” = EX

E. Residence Address

F. Headquarters Address (same as residence)

G. Resident/Headquarters Phone Number

1. Normal Work Hours (leave blank)

2. Private Vehicle License Number

3. Mileage Rate Claimed

4. Month/Year (dates of travel)

5. Time of Departure/Return (Military time)

6. Location Where Expenses Were Incurred – Sacramento/Your Home City Upon Return

7. Lodging (Include tax)]

8. Meals – Breakfast/Lunch/Dinner

9. Incidentals – Tips, Faxes, etc. up to $6.00 per 24-hour period

10. Transportation

A. Cost of Transportation

B. Type Used - Bus, Train, Taxi, Airplane, Shuttle

C. Carfare, Tolls, Parking

D. Private Car Use – Miles/Dollar Amount

11. Business Expense (copies, business supplies, etc.)

12. Total Expenses for Day

13. Subtotals

14. Purpose of Trip, Remarks, and Details

15. Claimant’s Original Signature

H.. All appropriate receipts must be taped to an 8½ x 11 sheet of paper.

I. Must be either typewritten or printed in black or blue ink (no pencil).

J. No white-out is permitted.

K. Must submit original claim with receipts.