

**Reimbursement of Travel Costs for  
Members of the Independent Citizen's Oversight Committee  
And for Employees of the California Institute for Regenerative Medicine**

**Policy Statement:** Under Proposition 71, "reasonable and necessary" costs may be reimbursed when conducting business of the ICOC or CIM. The ICOC adopted travel rules, with certain specific exceptions, that are used by the University of California for travel should be used for reimbursing travel by ICOC members and Staff.

**Travel Within and Outside California (including outside of the country):**  
Each member and employee will be eligible to receive reimbursement for the following actual and necessary costs:

- Actual cost of lodging. Please note that there are no specific maximums. However, members and staff are expected to attempt to incur the lowest possible costs consistent with the purpose of the trip. The state travel agency will assist you in getting government rates. **A receipt is necessary for reimbursement.**
- Actual cost of meals and incidentals is allowed in the following situations (**no receipts are needed**):

For each travel period of 24 hours, actual costs up to a maximum of \$50 for each 24 hour period will be reimbursed.

If the period of time traveled is greater than 12 hours but less than 24 hours, actual cost of meals and incidentals will be reimbursed up to a maximum of \$33. If the period of time traveled is less than 12 hours, an actual cost up to a maximum of \$33 is allowed if the trip either begins before 6:00AM or ends after 7:00PM.

If a meal is considered an integral part of a business meeting regardless of travel status, reimbursement for actual costs up to \$13 is allowed. Also, the same amount is allowable for a meal consumed by an FSLA-eligible employee during an approved overtime period.

In addition, the actual cost of lunch, with no maximum, is allowable for ICOC members and CIRM staff while attending ICOC or subcommittee meetings. CIRM staff will contract for these lunches so there will be no need for direct payment by either members or staff.

Finally, there is limited reimbursement for meals during overtime periods. Generally these are only available for persons in work week group 2 (FSLA eligible).

- Actual costs of travel

This includes travel by airline (coach only), train or automotive vehicles (including personal or rental vehicle, taxi, shuttle, etc), parking, tolls, etc. There are no maximums, but the UC handbook says that “[t]ransportation expenses shall be reimbursed based on the most economical mode of transportation and the most commonly traveled route consistent with the authorized purpose of the trip.” Again the state travel agency can assist you in arranging for the best deal using government negotiated rates. **Receipts are needed for all individual travel costs exceeding \$5.00.**

**NOTE:** The actual cost of traveling by Private Vehicle is reimbursable at a standard rate of \$.40.5/mile. In order to claim mileage, the member or employee must complete and sign a STD 261. The signed form should be sent to:

Walter Barnes  
Chief Administrative Officer and Controller  
California Institute for Regenerative Medicine  
PO Box 99740  
Emeryville, CA 94662-9740

- Other Expenses: Actual costs for expenses necessary for completion of official business – e.g. phone call, copies, etc. **A receipt is needed for each individual expense item in excess of \$25.**

**Obtaining Reimbursement:** To receive reimbursement, complete and sign a STD 262 (Travel Reimbursement Claim). For meals and incidentals, please include the total actual amount for all meals up to the maximum of \$50, \$33 or \$13 in the column marked DINNER (Column 5). Include the purpose of, and any clarifying information about, the trip or expense in Section 11.

Submit the form and any required receipts to:

Walter Barnes  
Chief Administrative Officer and Controller  
California Institute for Regenerative Medicine  
PO Box 99740  
Emeryville, CA 94662-9740

A reimbursement warrant will be mailed to your home address. If you wish it to be mailed to another address please indicate that in Section (11) of the STD 262.

**Questions?** – Contact Walter Barnes at the above address or by phone at (510) 450-2437 or by e-mail at [wbarnes@cirm.ca.gov](mailto:wbarnes@cirm.ca.gov)

## **Frequently Asked Questions**

**Question:** What is meant by the term “necessary”?

**Answer:** The UC rules are intended to ensure that an employee is reimbursed for travel expenditures that are required to carry out the mission of the trip and by the most cost effective means possible. In some instances – meals, mileage reimbursement - this is accomplished by setting maximums. However, in the case of two major travel expenditures - lodging and transportation – no maximums are given.

In most travel situations you are likely to be faced with many choices of high quality hotels and transportation alternatives that have varying prices. In those instances “necessary” would mean selecting one of the least expensive of these alternatives if it is available. The state travel agency can assist you in this effort.

There are circumstances where a higher cost is justifiable if the mission of the trip would be enhanced. For example:

- staying at a hotel where a conference you are attending is being conducted is appropriate even when another hotel might be less expensive;
- staying at a more expensive hotel that is closer to where most of your work will be conducted is appropriate when the avoided transportation costs will be close to or in excess of the increased cost of the hotel;
- the hotel is in an unsuitable location (e.g. – high crime, no services, etc); or,
- the least expensive transportation alternative would require many stops or has few alternatives consistent with the purpose of the trip.

Making decisions about lodging and transportation is more of a “judgment” issue and your judgment should be related to your desire to minimize administrative costs to maximize the amount that can be devoted to stem cell research. Personal convenience or preference should only play a role when faced with alternatives of reasonably similar amounts.

**Question:** When does a trip begin or end?

**Answer:** A trip begins at the time you leave your residence or place of work and a trip ends at the time you return to either your residence or place of work. Put the time leaving in military form (i.e. – 0600 instead of 6:00AM) on the first day of your trip in the designated box under Section (2) on the STD 262. Put the time returning on the last day of your trip in the designated box, also under Section (2) on STD 262.

These times determine when you are eligible to claim meals when traveling during less than a 24 hour period.

**Question:** What do I do with the receipt for airline, train or bus travel when the travel is arranged through the state's travel agency?

**Answer:** Please attach the receipt to the STD 262 when you submit it for reimbursement but only put the cost on the form if you paid for it directly. If the state has paid directly, you still need to include the receipt so that we can match up the claim from the travel agency.

**Question:** What if I lost my receipt for an item that requires a receipt?

**Answer:** Claim the amount that you paid and note in Section (11) on STD 262 that the receipt was lost. **NOTE:** There are many items that do not need a receipt – meals and incidentals, business expense items under \$25, travel expense items under \$5, etc.

**Question:** Why do I need to fill out a STD 261 to claim reimbursement for mileage while driving my own vehicle?

**Answer:** To ensure that you are aware of State of California rules regarding operation of a private vehicle on state business and to secure your concurrence with these rules.

**Questions:** I filled out a STD 261 before the change in the rules. Do I need to submit a new one?

**Answer:** No.

**Question:** What does "integral part of a business meeting" mean when determining whether to claim meal expenses of actual up to \$13?

**Answer:** The meal must be a scheduled part of a meeting, such as a working lunch. In addition, for staff eligible for overtime pay, a meal consumed during the overtime can be reimbursed. Reimbursement is not allowed based on a decision by two or more persons to dine together to continue business, or when a meeting can be scheduled during regular working hours.

**Question:** If my travel costs are initially paid by my employer, can the reimbursement warrant be made out to that agency/firm instead of to me.

**Answer:** Yes. Please note the name and mailing address of the firm or agency in Section (11) of the STD 262.

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