

PCT Trail-wide Volunteer Packer Reimbursement Program

Thanks to the working committee who volunteered to work on this issue: John Lyons, Top of the State Unit, Backcountry Horsemen of California; Ken Graves, US Forest Service Packer, Shasta-Trinity National Forest; Mike Dawson, Pacific Crest Trail Association; Beth Boyst, US Forest Service PCT Program Manager and Michael Morse, US Forest Service Packer, Inyo National Forest.

We concur that the current reimbursement situation is insufficient to offset the volunteer packers increased costs for fuel and food. This reimbursement policy contains our collective efforts to find legal methods to reimburse volunteer stock packers in support of the Pacific Crest National Scenic Trail (PCT) Program.

Principles and Objectives

1. Packer services are **essential** to completing volunteer and youth corps work on the PCT. USFS packing support is limited and partnering with Backcountry Horseman of America and other equestrians groups throughout California, Oregon, and Washington is essential to continue to maintain the PCT and provide outstanding recreational opportunities on the trail.
2. For the purposes of this reimbursement policy, a volunteer packer is defined as an equestrian volunteer that is transporting a crew's tools, gear, food, and/or equipment. It is not intended to reimburse individual equestrians performing volunteer trail maintenance duties or typically to support single day projects. For safety reasons, a volunteer assistant packer may also be authorized for reimbursement.
3. We must meet the legal requirements of USFS policies for reimbursement of sponsored volunteer and challenge cost share agreements.
4. The reimbursement policy will be applied trail-wide.
5. Agreement (USFS, PCTA, Backcountry Horsemen of CA, OR, and WA, and other equestrian volunteer organizations) on which priority packing projects will be reimbursed should be finalized prior to season's work beginning.

Trail-wide Reimbursement Policy and Animal Liability

The Volunteers in the National Forests Act of 1972 as amended (PL 92-300) authorizes the expenditure of appropriated funds to cover certain approved expenses incurred by volunteers as part of their service. The USFS has authority to reimburse volunteers for expenses that adhere to existing tax code and appropriation law. Reimbursement is meant to offset the personal cost of volunteering and in no way should be considered salary or be approved in lieu of pay. The Forest Service revised FSM 1833.5 in 2011 as a result of an Internal Revenue Service audit finding applicable to volunteer reimbursement by all public lands agencies. The revised policy will provide necessary compliance with Federal revenue law (Internal Revenue Code 170) governing charitable contributions and volunteer reimbursements and insure that volunteers are not placed in a taxable situation. A taxable

situation can result if volunteers receive reimbursements above what is allowable by law. Website references are as follows: https://fs.usda.gov/FSI_Directives/wo_1830.doc; or <http://www.fs.fed.us/t-d/pubs/htmlpubs/htm09672814/page20.htm>

1. PCTA Sponsored Volunteer Packer Reimbursement

Volunteer packers can propose potential projects and budgets to their local PCTA Regional Reps for approval prior to executing the project.

a) Authorization Process for Volunteer Packers: Packers authorized for reimbursement through PCTA's sponsored volunteer program are identified in the pre-project planning. At that time, the project budget – including the number of packers to be reimbursed, approximate mileage reimbursement, and incidental expenses will be identified. The authorized packer may invite other equestrians to attend the project and assist with packing noting that only the pre-authorized packers will be reimbursed for expenses.

b) Reimbursed Expenses: Within the PCTA's Challenge Cost Share Agreements, sponsored volunteer packers may be reimbursed for i) Transportation Costs; ii) Food/Meals; and iii) Incidental Expenses:

i) Transportation Costs: Authorized volunteers who are hauling stock or tools on a project will be reimbursed for mileage costs incurred on the way from their residence to the trailhead/work site, and on the return trip from the trailhead/work site back to their residence at the rate of \$0.80/mile. We will continue to monitor gas prices and may switch to actual expenses for gas receipts – whichever provides a higher reimbursement. If a detour is taken for personal business along the route, no additional mileage costs may be charged.

ii) Food/Meals: Generally, meals are a personal expense. However, funds may be used to purchase food for volunteers if the volunteer will be working in an area where access to normal sources of food supplies and/or meals is not available or reasonably accessible. If meals are not provided, to standardize the reimbursement across 26 national forest units, a field per diem rate of 75% of CONUS/per day (2012 rate of \$46 will be reimbursed rounded to the closest dollar = \$35.00/day). (**Note:** Region 6 uses the 75% of CONUS as the field per diem rate and R5 does not have a field per diem rate). When meals are provided, the value of those meals as outlined below will be subtracted from the reimbursement.

Per Diem Rate Per Meal	
Continental Breakfast/ Breakfast	\$5.25
Lunch	\$8.25
Dinner	\$17.25
Snacks/Incidentals	\$3.75

iii) Incidental Expenses. Incidental expenses must be approved by the PCTA in advance to ensure that there is sufficient budget available.

Volunteers may be reimbursed for incidental expenses incurred that are required and/or directly related to their service such as supplies, propane, and feed for stock.

Actual expense receipts must be submitted and be within the project budget. If items are purchased in bulk, a reimbursement request may be submitted at the end of the season (October 31st) to cover the portion used. Along with the receipt, a description of quantity used is required.

2. Payment for Services and Other Types of Funding Agreements

In situations where the above reimbursement is insufficient, the packer or organization, may work directly with national forests to develop alternative reimbursement methods. The Forest and/or packer would be responsible for securing funds for the alternative reimbursement.

Examples of alternatives are listed below:

a) Challenge Cost Share Agreements: BCHA or other equestrian groups can enter into a challenge cost share agreement with a Forest to have packing expenses covered. These may include a cost per day for stock, per diem, and mileage reimbursements.

b) Procurement of Services: The micro-purchase threshold for services is \$2500 (must be a no more than \$2500 within one field season) without competitive quotations for micro-purchases as long as the price to be reasonable. Packers could be paid an increased amount for services but would not be considered volunteers and covered under workman's compensation.

3. Animal Liability

The USFS is liable only for equipment and animals required for service if an *equipment rental agreement* is specifically executed with the individual volunteer and the local Forest.