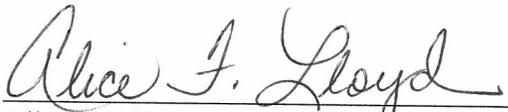


## A RESOLUTION APPROVING THE TRAVEL POLICY

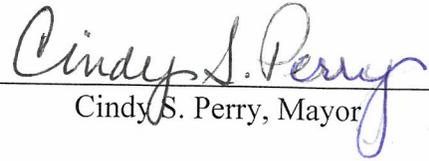
WHEREAS, the Town of Pittsboro needed to update the current Travel Policy to reflect current per diem rates and clarify policies related to meal expenses to be in line with state recommended practices; and

WHEREAS, the Town of Pittsboro recognizes that policies promote long-term stability by establishing clear and consistent guidelines; provides the Board of Commissioners and the Town's professional management a standard for best practices; and

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Pittsboro that the Travel Policy is hereby accepted, adopted and placed on file with the Town Clerk.



Alice F. Lloyd, CMC, NCCMC, Town Clerk



Cindy S. Perry, Mayor

# TOWN OF PITTSBORO



## Travel Policy

### PURPOSE:

This policy is established to provide Town employees detailed information regarding what is allowed when traveling on Town business. This policy applies to all Town employees and appointed boards.

### AUTHORIZATION:

Travel on official Town business must be approved by the Department Head and Town Manager. The authorization is intended to assure that the travel is necessary and that budgeted funds are available to meet all anticipated expenses. A travel request form must be submitted describing the travel request, purpose of the proposed trip, amount of funds requested, and period of time away from the Town.

If an employee traveling on official Town business combines personal travel, the travel request form should clearly define the dates and times of the personal travel.

### TRAVEL ADVANCES:

In order to not create a financial hardship for employees who are required to travel on official Town business, the Town will pre-pay and/or advance up to 100% of the estimated travel expenses, so long as the total requested advance for expenses is at least equal to the standard daily meal per diem limit. Advances are to be used for those employees who need the funds prior to their travel.

Whenever possible, Town Credit Cards, Purchase Orders, and/or A/P checks should be utilized to pay/pre-pay for transportation, registration and lodging to keep the actual out of pocket expenses requiring an advance as low as possible.

- Travel Advance Limits
  - Minimum:** Estimated expenses are equal to the standard daily meal per diem limit
  - Maximum:** 100% of estimated travel expenses
- NO TRAVEL ADVANCES will be issued for meal per diem for same-day travel trips

### PER DIEM MEAL LIMITS:

Breakfast	\$8.00
Lunch	\$11.00
Dinner	\$20.00

- Tips are included in the figures above
- The employee will not be reimbursed for meal purchases over the amount indicated above.

### MEALS WITH OVERNIGHT TRAVEL:

- On the originating date of any travel, the Town will not allow a breakfast expenditure unless the employee is required to begin before 7:00 AM and on the return date will not allow a dinner expenditure unless the employee is required to return home after 7:00 PM.

- The employee will not be allowed to use Town funds for any meal that is included in the registration or program fee. A copy of the conference or program agenda must be submitted with the travel request form.
- The travel must involve a travel destination located at least 35 miles from the employee's regularly assigned duty station (vicinity) or home, whichever is less.

The travel request form, with estimates/documentation for all trip-related costs and all necessary approval signatures/emails, must be sent to the Finance Director no less than five (5) business days prior to the expected departure date if an advance is requested.

#### **SINGLE DAY EVENT W/O OVERNIGHT STAYS:**

Allowances cannot be paid to employees for lunches if travel does not involve an overnight stay; however, employees can be eligible for allowances for breakfast and evening meals when the following applies:

- On the event date, the Town will not allow a breakfast expenditure unless the employee is required to begin before 7:00 AM and will not allow a dinner expenditure unless the employee is required to return home after 7:00 PM.
- The employee will not be allowed to use Town funds for any meal that is included in the registration or program fee. A copy of the conference or program agenda must be submitted with the travel request form.
- The travel must involve a travel destination located at least 35 miles from the employee's regularly assigned duty station (vicinity) or home, whichever is less.

#### **MEALS AND DAY-TO-DAY ACTIVITIES:**

Town employees may not be reimbursed for meals in conjunction with a conference, assembly or meeting, or by whatever name called, of employees within the Town to discuss issues relating to the employee's normal day-to-day business activities.

#### **MEALS FOR REQUIRED EMPLOYEE ATTENDANCE:**

A Town employee may be reimbursed for meals, including lunches, when the employee's job requires his/her attendance at the meeting of a board, commission, committee, or council in his/her official capacity and the meal is preplanned as part of the meeting for the entire board, commission, committee or council. Such board, commission, committee, or council must include persons other than the employees of the Town.

For reimbursements, the employee must provide a travel request form with justification for the reimbursement and the receipt.

#### **ACCOMMODATIONS:**

Employees attending schools and conferences should try to reserve hotel rooms that are available at block rates (these are normally determined by the host of the event).

If block rates are not available or are above the typical rate for the area, the employee should make reservations with a convenient hotel to the event with a typical rate for the area.

Amenities not included in the hotel rate are the responsibility of the employee. These include but are not limited to, personal phone calls, extracurricular activities, movie rentals, dry-cleaning, and room service.

Business calls while at the hotel are covered expenses, i.e. calling Town Hall.

If the trip requires the employee to begin travel before 7:00 AM in order to arrive at the destination on the opening day of the school, then the employee is eligible to make reservations for the prior evening.

#### **PURCHASES:**

Purchases made using the Town of Pittsboro credit card should be documented and receipts should be returned to the Finance Director for each purchase. This includes hotel receipts.

The Town of Pittsboro credit card should only be used for hotel reservations, conference registration or fees and food with a few exceptions. Food should only be charged if a cash advance was not dispersed before travel. Food charges should be within the per diem meal limits and restrictions noted above.

No purchases of alcohol shall be made at any time with the credit card or monies distributed or reimbursed by the Town of Pittsboro.

#### **TRAVEL REQUEST FORM:**

- If an advance is required – the travel request form should be completed and returned to the Finance Department at least five (5) days prior to departure.
- If no advance was requested – any reimbursements should be recorded on the travel request form and returned to the Finance Department within five (5) business days of returning to work.

#### **TRANSPORTATION:**

- Town employees traveling on official business are encouraged to use a Town vehicle whenever practical.
- When the employee drives his/her personal vehicle, the beginning and ending mileage should be documented. If there are any personal use miles on the trip, they should be deducted from the total amount of miles. Mileage for travel will be paid only for the shortest usually traveled route plus mileage related to official business activity.
- The employee will be reimbursed at the current IRS reimbursement rate.

#### **WORKERS COMPENSATION:**

Employees and officers absent from the Town of Pittsboro on official business will be covered by workers' compensation insurance in accordance with the North Carolina Workers' Compensation Act.

**DETERMINATION OF HOURS WORKED:**

The determination of hours worked for time spent in travel and training shall be computed in accordance with the provisions of the Fair Labor Standards Act.

**APPLICABILITY:**

All employees, including department heads and elected officials, shall consistently follow this policy. Employees who choose not to follow this travel policy will not be reimbursed for travel or meal expenses.

**ATTACHMENTS:**

Travel Request Form (Appendix A)

**RELATED POLICIES:**

- Purchasing Policy
- Credit Card Policy