

# **TOWN OF LITCHFIELD**

## **CONFERENCE & MEETING TRAVEL POLICY**

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Reviewed April 22, 2019

ORIGINAL

### **PURPOSE**

To establish a policy describing reimbursement or advance payment of expenses related to conferences, training and seminars. This policy's goal is to maintain costs within reasonable limits, ensuring that neither the Town nor the employee (employees, volunteer or elected official) loses any funds as a result of the travel. This policy will apply to all employees and department heads of the Town seeking payment for registration, transportation and travel expenses.

### **OVERVIEW**

All requests for attendance to a training, seminar, programs or conferences requiring overnight lodging and/or transportation with a one way distance of 125 miles or more will be made in writing and with proper documentation describing the purpose of the travel, a synopsis of the meeting and information related to how this meeting will benefit the Town or consistent with the training and development needs of the employee. A request coming from an employee other than the Department Head must be approved by the Department Head prior to any reimbursement or payment being made for such request. Advanced requests may be made up to 60 days prior to the meeting to allow for review the documentation, obtain approval, calculate the payment and process a check. When possible, the advance will be processed at least 7 days prior to the trip. Expense requests after the event must be submitted within 10 days of the event; the Town will only pay the actual charges for expenses incurred and is not responsible for any late fees or additional credit card charges that may be incurred by the employee. This is critical to maintaining accurate expense reports during the year. The total cost of the trip must be within the approved budget. All expenses must conform to any requirements imposed by the IRS, the granting agencies, or sponsors. If the trip is canceled and no substitute employee is taking the original traveler's place in the trip, the funds advanced must be returned to the Town.

### **REGISTRATION FEES**

Fees for specific seminar, programs or conference expenses requiring to be paid in advance must be submitted with the employees travel request and documentation to the department head or approving authority. The fees for the employee's attendance will be paid directly by the Town and not provided to the employee.

### **TRAVEL TRANSPORTATION EXPENSES**

Reimbursement will be made for all reasonably necessary travel unless otherwise prearranged with the Town Administrator or Department Head. Reimbursements or payment requests will be requested as round trip unless as part of the trip is another business related stop either to or from the event, in cases where there are additional business related activities while en route to the main event. The reimbursement will include:

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- A. Use of Private Auto for travel: Reimbursement will be made at the federal mileage rate established by the Internal Revenue Service and adopted by the Board of Selectmen. Additional reimbursement to offset cost of tolls & parking can be made with documentation of such cost in the form or receipts. The reimbursement request must include the standard mileage or shortest route. The employee is expected to provide their own vehicle insurance coverage. Employees are expected to utilize rental or town vehicles for travel whose expenses would exceed the rental costs in mileage reimbursement to attend the meeting. Mileage reimbursements defray the cost of operation to the private vehicle including private insurance cost. Traffic fines or other violations of the law will not be reimbursed. Multiple employees who are attending the same conference are expected to carpool if travel arrangements are compatible.
  
- B. Travel by Air: Reimbursement will be for economy class or coach fare. The employee should strive to purchase the lowest-priced tickets available with a reasonable schedule. If the traveler chooses to travel by auto instead of air, the lesser of coach/economy fare or mileage by auto will be reimbursed. No lodging costs will be covered in the reimbursement while en route, with the exception of such lodging costs that may be required in order to qualify for a reduced airfare. In such cases, the combined cost of the reduced airfare and lodging must be at least 5% less than the next best airfare option that does not require a reimbursed night of lodging. Any frequent flier miles or equivalent rewards that may be earned through such travel are the property of the employee. In such case that a delayed flight or some other event out of the control of the employee prevents smooth and planned travel, reasonable reimbursement for expenses beyond those that may be made available through the travel service provider may be provided.
  
- C. Other: Taxicab, ferries, tolls, shuttle, or reasonable transportation cost will be reimbursed if deemed necessary. Rental changes will generally be limited to compact size cars; however, if unique circumstances of the trip, including number of travelers or quantity of equipment, make a different vehicle type more appropriate for the needs of the traveler(s) and are in the financial best interest of the Town, a waiver can be requested from the Town Administrator. If a rental car is necessary, no one other than the employee (traveler) shall drive the rental vehicle. Rental cars will only be authorized in such cases when it is not reasonable to use shuttles, taxis or other transportation option.
  
- D. Travelers are responsible for documenting fare savings for a weekend or holiday stay-over. Additional lodging charges, per diem and other expenses will be reimbursed only up to the amount of the savings on the fare.

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### LODGING

In general, trips of less than 100 miles one way do not qualify for an overnight stay unless there are meetings or conferences that last more than one day or there are two different meetings being held in the same location on two consecutive days, therefore saving the additional travel expenses for mileage and the traveler's additional time to and from the different meetings.

Lodging per-diem may be requested for each night the travel is away from home on Town business except where overnight transportation (air, bus or other commercial travel) is used. Per Diem rates will be reviewed each year from the IRS Publication 1542 or at [www.gsa.gov](http://www.gsa.gov). The Per Diem rate will be the standard rate offered by the Town and the employee should strive to find accommodation for that rate. In unusual circumstances, or where a specific hotel is the only reasonable option and the rate exceeds the per diem rate, the employee may request a lodging reimbursement waiver from the Town Administrator in which cases lodging receipts or other documentation verifying the cost will be required.

The payment for accommodations may be extended with department head approval from the night preceding the day of the meeting if the time the meeting starts prior to 9AM or is more than 2 ½ hours away and may be extended through the night of the last day of the meeting if the meeting ends later than 6:30PM or is more than 2 ½ hours away. If the traveler chooses to stay in accommodations off site from the conference or meeting in which there is a host accommodations offered, the maximum the traveler will be reimbursed or advanced for lodging will be the lesser of the two rates; the special rate offered with the event at the host accommodation or the per diem rate for that area.

### MEALS & INCIDENTALS

Following IRS regulations, meal expenses or per-diem rates are not allowed for one-day travel. However, bona fide business meals may be reimbursed or advanced with authorization from the Town Administrator.

For meals, the per diem rate (from IRS Publication 1542) for daily meal cost will be used and may be requested in advance. The rate will be determined using the federal guidelines for the nearest area to the event. All payments will be reduced by the meals offered or included in as part of the event, agenda, or as part of the lodging. To receive an advance per-diem rate or reimbursement, the traveler must include a copy of the registration and agenda for the event they are attending with the request for the advance or reimbursement. It is the responsibility of the traveler to allocate the per diem reimbursement to cover all necessary meals. No additional reimbursement will be made for meals and incidentals. By using the per diem approach, no supplemental documentation of receipts will be required from the employee.

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On the days of travel to or from an event rates will be adjusted or reduced according to the traveler's normal work schedule to exclude any meals not incurred during the time of travel. The following reductions shall apply to for included meals: breakfast, 20%, lunch 30%, dinner 50%.

**OTHER ACTIVITIES**

Use of facsimile, photocopying, or internet access will be reimbursed at reasonable rates if related to the employee's job functions.

**NON-REIMBURSABLE OR NON-COVERED EXPENSES**

No entertainment, personal phone calls, child care, personal grooming services, in-room movies, lost baggage, insurance cost for flight or automobile or auto rental, lost or theft of cash advance money, airline tickets, personal funds or property, "no-show" charges, automobile repairs, pet care, upgrades for air, hotel or car, or laundry expenses will be reimbursable.

**INDIRECT ROUTE OR INTERRUPTIONS IN TRAVEL**

If there is an interruption or deviation from the direct route resulting in excess travel time, because of the employee's personal preference, convenience, or through the taking of leave, the per diem allowed will not exceed that which would have been allowed or the mileage reimbursement will not exceed what would have been paid if the travel was done uninterrupted.

**EXPENSES FOR SPOUSES OR OTHER GUESTS**

The Town Administrator or a Department Head may occasionally be required to pay for meals for others. These expenses are reimbursable when the business purpose of the meal is justified in writing. If the traveler is using the per-diem method for payment of the expenses, supplemental meal per-diems will be given with a list of names attending the business meal, their affiliation, and the purpose of the meeting is provided.

No reimbursement of expenses incurred by spouses or guests will be allowed. If the lodging or meal cost increases because of additional guests the traveler wishes to bring while at the conference, the additional expenses are not reimbursable. The costs for such guests must be paid separate from the Town's payment. The traveler may include a personal check with the registration form to be sent with the Town's payment for the conference. If the employee intends to extend the trip and/or bring a spouse or guests, such an add-on should be noted in the travel request.

**GROUP OR SHARING EXPENSES**

Where possible the sharing of expenses with another employee, group, or organization is encouraged to reduce the expenses incurred by the Town. Such expenses may be the sharing of travel expenses, lodging, rental cars and other travel costs. When a group of Town employees may be purchasing services or meals together, the purchase

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must be done by the highest ranking employee present.

**ALL EXCEPTIONS**

The Town Administrator or Board of Selectmen has authority to approve exceptions to the provisions of the policy that are considered in the best interest of the Town and of the individual traveling.

**Approved April 30, 2012**


**Revised April 22, 2013**

**Revised May 12, 2014**

**Reviewed April 27, 2015**

**Reviewed April 11, 2016**

**Reviewed April 22, 2019**

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