



Town of Chapel Hill, NC

Travel Policy

Policy Number: BMD-01

Reissue Date: January 1, 2018

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Approved By:

Roger L. Stancil, Town Manager

## Travel Policy

### I. POLICY

The Town provides travel funding to cover expenses related to Town work and professional development in a manner that is consistent with and deserving of the level of trust that has been placed in us by the community members of Chapel Hill. Travel procedures are administered consistently and fairly to everyone regardless of rank, tenure, or personal background.

[Town of Chapel Hill Code of Ordinances Chap 14, Article IX](#)

### II. PURPOSE

Travel for work-related purposes is provided to Town employees to support the excellence of our employees and the accountability of the organization as a whole.





**Professionalism:** We are committed to the excellence and accountability of our own performance as well as the performance of the organization. We carry out our jobs efficiently and effectively, are open to feedback about our performance and show a willingness to learn.



**Ethics:** We conduct ourselves in a way that is consistent with and deserving of the level of trust that has been placed in us by the community members of Chapel Hill.

The Director of Business Management is authorized to issue procedures consistent with this policy.

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	<b>Travel Policy Procedures</b>	<b>Reissue Date:</b> <b>January 1, 2018</b>		<b>Kenneth C. Pennoyer</b>  <b>Business Management Director</b>

### III. Travel Procedures

**These procedures are issued by The Director of Business Management to implement the Travel Policy, BMD-01, issued by the Chapel Hill Town Manager. These procedures may be periodically updated.**

A: General Provisions for Travel

Travel reimbursement, whether local or out of state, is offered in support of the employee’s professional development, the department’s operations, and the Town’s provision of service. Approved travel is based on these factors as well as responsible stewardship of public assets.

These procedures establish guidelines for travel.

In the administration of these procedures, our intent is to make travel a seamless, simple, and supportive process for employees and supervisors. Whenever there is a question concerning travel and the application of these procedures, these five questions can serve as a guide:

1. Is it consistent with established law?
2. Are funds available?
3. Is it fair to this employee and to other employees?
4. Is it consistent with our Town values?
5. Does it benefit the Town and represent good stewardship of Town resources?

Supervisors should work with their employees to review travel requests and ensure that they meet the employee’s needs while balancing operational needs and responsible stewardship of resources. In the administration of these procedures, a supervisor and employee may identify alternative, more cost effective ways to travel and those variations should be documented and provided to the Town along with their travel reimbursement.

Employees are responsible for seeking advance authorization for travel requests through their supervisory system, providing documentation of travel-related expenses and activities, and being familiar with the travel procedures prior to travel.



Employees and supervisors are asked to document their requests and their reasoning behind certain decisions as part of the Town's auditing and public record keeping system. Supervisors are encouraged to provide brief descriptions of any circumstances for which they are authorizing a travel circumstance that may be atypical.

Notwithstanding, certain expenses are not eligible for reimbursement or payment by the Town. Examples include:

1. Traffic violations
2. Parking fines
3. Entertainment
4. Alcohol
5. Laundry or other personal care items
6. Transportation upgrades or early boarding fees
7. Insurance or other add-ons for rental cars
8. Any additional costs associated with spouse/partner/children/etc. traveling with the employee (See travel with family members)

If an employee is not certain whether an expense will be covered, they should seek clarification through their supervisor prior to incurring the expense.

## B. Guidelines for Travel

### 1. **Choosing a Means of Travel**

Town employees and their supervisors are encouraged to choose the lowest-cost option for travel, with consideration given to efficiency, the value of the employee's time, and funding. If an employee chooses a more expensive means of travel for personal reasons or convenience, the Town will pay an amount equal to the lower-cost option, with the supervisor's documentation.

### 2. **Travel with Family Members**

The Town supports work-life balance for employees and recognizes that travel may require time above and beyond the typical work day. For these reasons, transportation and meals are provided for the employee during time away. Employees may choose to bring family members with them when they travel, at their own expense.

See: [Lodging](#)

See: [Town vehicles](#)



### **Supervisor's Rule of Thumb**

Q. My employee wants to drive to an out-of-state conference so their family can go along. Driving will cost more in mileage reimbursement than flying would cost. What should I do?

A. We encourage employees and supervisors to be flexible in developing their travel plans and to share your thinking about special considerations. The employee's family may travel with the employee. The Town will only reimburse the employee an amount equivalent to a round-trip flight (their lowest-cost option in this example). You and the employee can provide a flight quote and a simple description of your thinking when submitting the travel request. This approach may be used for other, similar situations.

### **3. Guidelines for Reimbursable Expenses Associated with Town Travel**

#### **A. Automobile Transportation**

Town employees should travel by the least expensive means available, taking into account the value of the employee's time and responsible stewardship of Town resources. Town employees are encouraged to use a Town-owned vehicle for local travel, when practical.

1. **Town-Owned Vehicle:** When available and applicable, employees should request a Town vehicle for travel in-state or in nearby states where driving would be less expensive than other means of travel.
  - a. Employees are encouraged to fuel town-owned vehicles at Town facilities whenever possible.
  - b. Town vehicles may only be driven by authorized Town employees (See Town Vehicle Policy).
  - c. Carpooling is encouraged when multiple employees are traveling to the same location.
  - d. The Town will pay for gas for Town vehicles when the employee provides a copy of the receipt for payment.
  
2. **Personal Vehicle:** If a Town employee chooses to drive their personal vehicle for work-related purposes, they should be aware that their personal insurance will be primary in case of an accident.
  - a. The Town will reimburse personal vehicle mileage at the IRS rate at the time of travel ([link](#)).
  - b. If an employee uses their personal automobile traveling for Town related business outside of Chapel Hill, the Town will reimburse the employee from their point of departure (work or home) and their point of return.
  - c. Proof of mileage (Google Maps or similar print out) must be turned in with Travel or Reconciliation Form.



3. **Frequent (Monthly) Travel:** If an employee routinely travels for work-related purposes (meetings or specific projects) they may be reimbursed for meals, mileage, and parking fees.
  - a. Departments should anticipate these reimbursement expenses in their annual budgets.
  - b. Employees should complete a Local Mileage Reimbursement Form and may receive petty cash reimbursement for amounts up to \$25 or an accounts payable check for amounts over \$25.
  - c. Business Management uses the following standard mileage amounts for travel between Town Hall and various Town locations.

FROM	TO	MILEAGE
CHPD	TOWN HALL	0.7
LIBRARY	TOWN HALL	2.7
PARKS & RECREATION (PLANT RD.)	TOWN HALL	2.7
T.O.C.	TOWN HALL	5.2

*ROUND TRIP MILEAGE X2*

Note: These are just the most commonly used locations; not all Town facilities have been included. Please use Google Maps (or similar) to calculate accurate mileage to and/or from other locations.

- d. Checks will be issued in accordance with the regular check disbursement schedule.
  - e. Based on IRS regulations, meals cannot be reimbursed on a per-diem basis if the employee is not traveling overnight. The per diem rate structure will still be used to determine meal limits, but receipts must be submitted for reimbursement.
  - f. Monthly receipts should be submitted on a monthly basis by the 10<sup>th</sup> of the following month to receive reimbursement. Receipts more than 90 days old cannot be processed.
4. **Rental Car:** Rental cars at the destination are a reimbursable expense when they are required for business needs while traveling. Supervisors should confirm the necessity of a rental car prior to travel.
    - a. For transportation to and from airport, hotel, conference, training, or to get meals, employees should first use other modes of transportation (walk, taxi, shuttle, ride share) when they are available.
    - b. Rental cars may be approved by the supervisor if the employee can demonstrate and document a business need or other compelling necessity.
    - c. Rental cars are not allowed for personal convenience or to explore your travel location during non-conference/class time.
    - d. The Town procurement card should be used to pay for the rental car because it provides coverage on a 24-hour basis for damage due to collision or theft.



- e. The employee must decline the rental car company's insurance – the Town will not reimburse if the employee uses the rental car insurance because the Town has vehicle insurance.
- f. If the employee does not have a Town issued procurement card, employee may use personal credit card if it supplies insurance or the employee's personal automobile insurance shall be primary coverage.

#### **Supervisor's Rule of Thumb**

Q. I have two employees who are traveling to a conference out of state. They have proposed to rent a car for the days they are there, and say it will be less expensive than using taxis and public transportation for each of them. They have also shown me that it would be difficult for them to move between the conference, meal locations, and their hotel. Should I approve the rental car?

A. While some destinations have ample access to shared-transportation, buses and walking destinations, we recognize that others do not. If you and your employees have evaluated their options and renting a car is the most cost-effective and efficient way for them to participate in the training, they may rent the car.

#### **B. Parking**

The Town will reimburse parking fees directly related to travel when the employee provides a copy of the receipt for payment.

#### **C. Meals**

The Town will reimburse for allowable meal costs incurred during town-related travel at the per-diem rates described below. We encourage employees to collect a per diem amount for meals during travel either in advance of their travel or upon return.

***If the employee chooses to use their Town purchasing card to purchase meals while traveling, Town funding will be provided only up to per diem rates. The employee will be responsible for any amounts over the per diem meal allocation.***

- a. No receipts are needed upon return when receiving a per-diem for meals.
- b. Meals cannot be reimbursed on a per-diem basis if the employee is not traveling overnight. The per diem rate structure will still be used to determine meal limits, but receipts must be submitted in order to be reimbursed.
- c. If an employee chooses to use a purchasing card for meals, the original receipt must be turned into Business Management with the employee's travel reconciliation **and** a copy of the receipt must be turned in with the employee's purchasing card log.



1. The [General Services Administration \(GSA\) website](#) is used to calculate reimbursement rates for domestic travel. – see website link under [FORMS/INSTRUCTIONS SECTION](#)
2. The GSA (full day) per diem amount should be allocated as follows:
  - a. Breakfast 25% of full day GSA
  - b. Lunch 25% of full day GSA
  - c. Dinner 50% of full day GSA
3. Per-diem does not apply to meals included in the program/class the employee is attending.
4. Supervisors should coordinate with their employees to calculate per diem amounts for meals during times the employee is away or could reasonably be expected to be traveling.

#### **Supervisor's Rule of Thumb**

Q. I am not sure which meals my employee should claim on their travel form. They're leaving early and the training provides coffee, but no food. They have to drive home after the session ends and may be home in the evening, depending on traffic.

A. If your employee cannot be reasonably expected to eat before they leave or arrive home, or if they would typically be traveling during a meal time, they may claim a per-diem amount for that meal. If a registration includes morning coffee but not a full breakfast, for instance, they may claim per diem. When a full meal is provided as part of a conference or training, the employee should not claim per diem for that meal.

#### **D. Non-Automobile Transportation**

The Town will pay for non-automotive transportation when driving a Town vehicle or personal vehicle is not a reasonable option.

1. The town will pay the following **round-trip transportation** fares:
  - a. Train: regular ticket
  - b. Bus: regular ticket
  - c. Air: coach ticket
  - d. The Town will not pay for upgrades or early check-in fees. The employee may choose to add these features at their own expense, which shall not in any way penalize the reimbursement of the basic round-trip expense.
2. A **luggage check** fee will be reimbursed when the employee provides a copy of the receipt for payment.
3. **Transportation fees:** may include personal vehicle mileage, taxi, shuttle, ride share (Uber or other) to and from airport if directly related to the business travel.



## E. Lodging

The Town will pay for the actual cost of lodging (room, taxes and associated fees only) for the duration of town related travel.

1. If employees choose to extend their stay for personal reasons, they may do so at their own expense.
2. If an employee travels with family and the cost of lodging is equivalent to the employee traveling alone, the Town will pay the cost of the room.

### Supervisor's Rule of Thumb

Q. My employee is traveling to a conference in a nearby city where driving is the only travel option. They could drive back and forth each day, but that would add a few hours of travel time for those days. They want to stay in a hotel. How far away do they have to go to stay in a hotel?

A. Generally, if an event is less than an hour's drive from their home (about 60 miles), an employee may opt to drive each day. However, if you and your employee decide that staying at the hotel allows them to make better use of the training, if there is a Town benefit, or if the travel creates an unreasonable burden, you may choose to include lodging. A brief description of your rationale for the choice can be added to the travel request for consistency when you are considering similar requests.

## F. Registration

The Town **will pay** event registration or training costs for town-related activities. Supervisors should review registration fees to confirm that all paid activities have a town-related purpose.

### Supervisor's Rule of Thumb

Q. My employee wants to add a component to their registration that provides an in-depth training, but there's an extra fee. Should I approve it?

A. If there is a direct town-related benefit to the employee taking the training, it may be included with the registration cost.

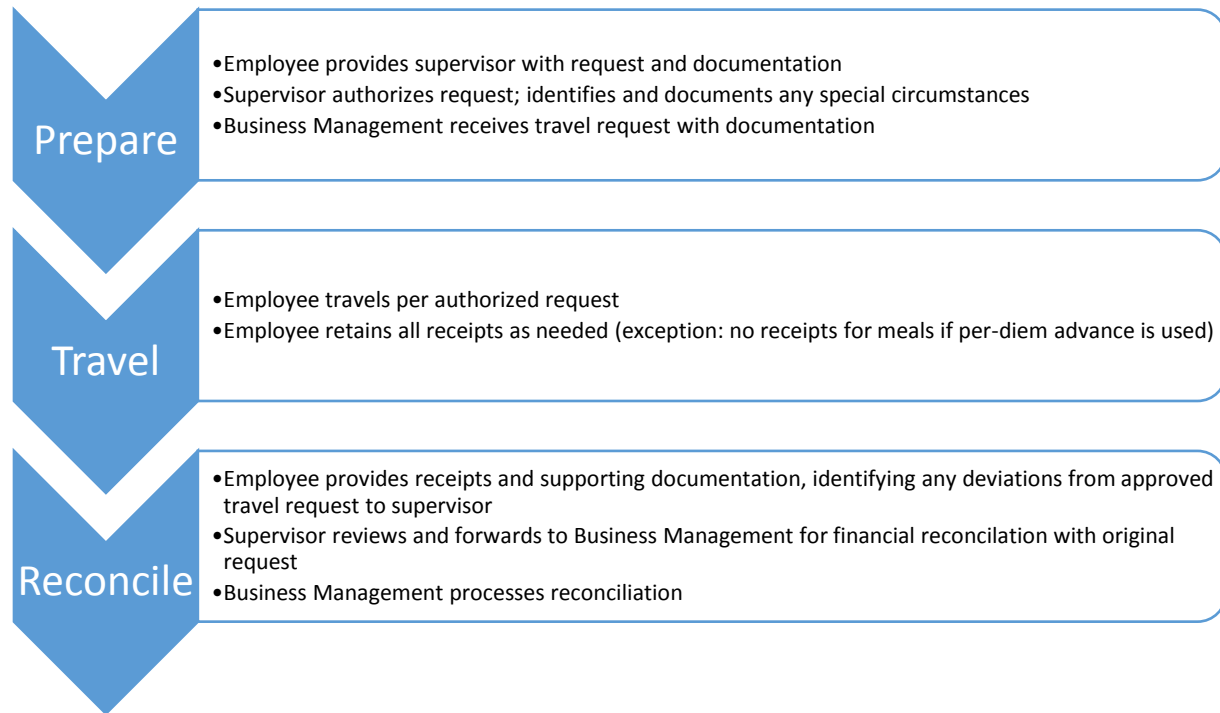
Q. My employee's registration form includes an extra cost for a networking social hour after the main program ends. Should I approve it?

A. Generally, if the extra cost is for networking, entertainment, or activities that would not be considered work-related, those costs should not be included in the registration but the employee may choose to pay for them on their own.





## C: How to Request Travel



## D: How to Track Expenses

Employees must retain all receipts when traveling, the only exception being for meals when a per-diem amount is authorized.

Receipts may need to be used for documentation of travel expenses for reconciliation and a second time for purchasing-card reconciliation (if a purchasing card was used).

## E: What to Do When You Return

**Employees** should collect any supplemental documentation, including receipts or documentation for changes to the original travel plan, for reconciliation and submit to Business Management within 10 days of return. Employees do not need to re-submit documentation that was provided with the original request unless something changed.

**Supervisors** should review the travel form and identify any special circumstances. If there are changes or requests for special consideration, the Supervisor will make a recommendation to Business Management, in accord with the intent of these procedures (See Section A).

**Business Management** will reconcile the original request with the funds spent and issue a travel reimbursement or invoice (if the employee received a travel advance in excess of actual expenses), as appropriate.



#### IV. FORMS/INSTRUCTIONS:

##### INSTRUCTIONS FOR FINDING A PER DIEM RATE

1. General Services Administration Website <https://www.gsa.gov/travel-resources>
2. Enter either the State and City or zip code for your destination. Click "Next."
3. Click "Look Up Rates By Fiscal Year." Make sure you use the current fiscal year (based on federal fiscal year which begins in October). Click "Go."
4. This should bring you to the page that details your destination's per diem rate.
5. Click on the "Print Results" button and submit this page with your travel form.
6. The only relevant information the Town uses is the M&IE (Meals and Incidental Expenses) rate, which includes tips for meals, luggage handling and snacks.

The breakdown for individual meals is as follows:

Breakfast = (rate) x 25%  
Lunch = (rate) x 25%  
Dinner = (rate) x 50%

#### V. ADDITIONAL CONTACTS:

Business Management 919-968-2712 [accountspayable@townofchapelhill.org](mailto:accountspayable@townofchapelhill.org)

#### VI. DEFINITIONS

#### VII. RESPONSIBILITIES

##### All Employees are expected to:

- a) Be aware of these procedures before committing to travel.
- b) Provide documentation for travel in a timely manner.
- c) Ask questions about anything they do not understand.

##### All Supervisors/Managers are expected to:

- a) Be aware of these procedures before recommending travel.
- b) Support and encourage the professional development of all employees of the Town.
- c) Consider travel requests in the context of available budget resources, organizational effectiveness, and the impact of travel on department operations.
- d) Review their employee's travel requests for accuracy and consistency with the Town's guidelines
- e) Ask questions about anything they do not understand.

##### All Department Heads are expected to:

- a) Plan for travel and related expenses in their annual budgets.
- b) Support and encourage the professional development of all employees of the Town.
- c) Recommend or approve travel that supports the development of the Town's operations and the professional development of employees, consistent with these guidelines.
- d) Ask questions about anything they do not understand.



**All Business Management staff members are expected to:**

- a) Provide guidance for employees and managers on travel-related procedures.
- b) Assist employees in receiving authorization and reimbursement in a timely manner.
- c) Administer these guidelines with reasonable flexibility to support and encourage the professional development of Town employees.
- d) Monitor the use of these guidelines and report to Town supervisors and Department Heads on trends, inconsistencies, or suggestions for improvement in administering travel requests.

VIII. APPENDICES None

IX. FREQUENTLY ASKED QUESTIONS: None

X. SCOPE: This policy applies to all regular full and part time employees.

XI. RELATED INFORMATION

[PP 3-3 Compensatory Time, Exempt Employees](#)

[PP 3-1 Overtime Policy, Non-Exempt Employees](#)

XII: POLICY HISTORY:

Reissued January 1, 2018

This policy replaces and supersedes any previous Town policies, departmental policies, handbooks, or unwritten policies or practices covering the same subject. Departmental policies in compliance with this policy are referenced in Section XI below, **Related Information**. In the event of any disparity between this policy and the Town's Code of Ordinances and/or applicable local, state, or federal laws, the Town's Ordinance and/or applicable laws shall prevail.

