

Buffalo & Erie County Public Library

PERSONNEL POLICIES AND PROCEDURES

SUBJECT: Work Related Travel, Continuing Education, and Library Business Requests

CHAPTER: X

SECTION: 3

EFFECTIVE DATE: 1/1/14

I. STATEMENT OF POLICY

Employees of the Buffalo & Erie County Public Library (B&ECPL) are often required to travel to meetings, conferences and other work related events outside their normal place of business. Staff members are also encouraged to participate in local, state and national library conferences, training, webinars, etc. which will enhance their work skills and knowledge, and benefit both the individual and Library. These policies and procedures have been established, in order to provide all staff members the opportunity to engage in such activities and to compensate employees where employee attendance is requested and/or required by the B&ECPL.

Please note that this document supersedes all pre-existing policies, procedures or guidelines related to Reimbursement of Travel Expenses and Continuing Education requests.

II. BASIC TRAVEL GUIDELINES

A. Local Travel

1. Local travel includes travel within Erie or a contiguous county.
2. Mileage reimbursement for travel from one B&ECPL location to another will be made to any employee.
3. Reimbursement will also be provided when driving to present a library program or attend a conferences, meeting, or workshop that has been approved by a supervisor.
4. Employee will not be compensated for local travel from a non-business site (including employee's home) to an event, or from an event to a non-business site (including employee's home) at the conclusion of the event.
5. To be reimbursed for local travel, an employee must submit a Claim for Mileage. Employee should include the applicable distance, tolls, and parking fees; and must attach supporting documentation in order to be reimbursed.
6. Mileage reimbursement is based on the rate which has been established for employee's bargaining unit or Board adopted rates for non-bargaining unit staff. Employee must select the appropriate bargaining unit at the top of the Claim for Mileage form in order for the form to calculate the reimbursement.

7. The Claim for Mileage form must be signed by a supervisor and submitted by the employee to the Chief Financial Officer no later than the tenth (10th) of the month following the date(s) when the travel occurred.
8. Untimely, incomplete, unauthorized, or informal requests for reimbursement will not be considered.

B. Out of Town Travel

To be reimbursed for travel outside of Erie County or a contiguous county, or any travel which requires an overnight stay, employee must receive advance approval through the Continuing Education/Library Business Request Form, and submit a Travel Expense Voucher prior to receiving reimbursement. SEE SECTION III. CONTINUING EDUCATION/ LIBRARY BUSINESS REQUESTS and SECTION IV. TRAVEL EXPENSE VOUCHER.

C. Hours Worked

1. Time spent traveling to and from work is excluded from hours worked.
2. Time spent traveling during an employee's scheduled workday and as part of an employee's duties will be counted as hours worked.
3. Employees will not be compensated for travel time spent going to or from an event held outside of Erie County or a contiguous county, if such travel was performed outside of the employee's normal working hours.

4. Employees will be compensated for travel time needed to attend an event held inside of Erie County or contiguous county, if such travel is performed on a continuous work day basis from one business site to another.
5. Travel time will not be compensated for local travel from a non-business site (including employee's home) to an event, or from an event to a non-business site (including employee's home) at the conclusion of the event.
6. The employee should complete his/her timesheet for the specified time by designating "L.B."(Library Business) and the event/location.

III. CONTINUING EDUCATION/LIBRARY BUSINESS REQUESTS

To obtain release time or reimbursement for expenses associated with attending a conference, training, webinar, etc. an employee must receive advance formal authorization through the following process:

A. Authorization Prior to Event

1. At least two (2) weeks prior to the conference, training, webinar, etc. an employee must submit a Continuing Education/Library Business Request Form to their supervisor.
2. Supervisor should complete appropriate section and return to employee. Both the employee and supervisor should be considerate of the time requirement for employee's submission to HR (#3 below).

3. After receiving approval from his/her supervisor, the employee must submit the Continuing Education/Library Business Request Form to HR at least ten (10) days prior to the event. Information regarding the event, such as a copy of the conference brochure, must be attached to this form.
4. If the need exists for a travel advance, please submit the request form directly to HR at least thirty (30) days prior to the event. Travel advances will only be considered when attendance is requested/required by the library and hardship is demonstrated.
5. In reviewing the Continuing Education/Library Business Request, the following factors will be considered when recommending approval or disapproval (including but not limited to):
 - a. Is the event relevant and significant to the accomplishment of library mission;
 - b. Will the employee's absence unreasonably interfere with operations;
 - c. How much time the employee has utilized for professional development in the current year;
 - d. Recency of previous funding for continuing education for this employee;
 - e. Are the associated costs reasonable and affordable;
 - f. Are budget funds available;
 - g. Does the program relate to the employee's position; and
 - h. Is the Library requiring attendance?
6. Once a determination has been made regarding approval of release time and/or reimbursement, a copy of the Continuing

Education/Library Business Request Form will be returned to the employee.

B. After the Event

1. An employee who has received approval for release time and/or travel expense reimbursement must submit a completed Conference/Seminar Assessment Form with proof of attendance to Human Resources within ten (10) days after the event.
2. An employee who has received approval for travel expense reimbursement must submit a Travel Expense Voucher with detailed original receipts within ten (10) days after the event. SEE SECTION IV. TRAVEL EXPENSE VOUCHER.
3. The employee should complete his/her timesheet for the specified date(s) by designating "L.B."(Library Business) and the event/location.

Untimely, incomplete, unauthorized, or informal requests for reimbursement or release time will not be considered.

IV. TRAVEL EXPENSE VOUCHER

A. Travel Expense Voucher Form

1. An employee who has received pre-approval for reimbursement of expenses through the Continuing Education/Library Business Request Form must also complete a Travel Expense Voucher before reimbursement will be provided.

2. The Travel Expense Voucher must be submitted to HR within ten (10) days of return from the travel/event.
3. Documentation must be attached to the Travel Expense Voucher for each reimbursable expense.
4. Employees seeking reimbursement should make every effort to incur the lowest reasonable expense and may be asked to demonstrate same.
5. Reimbursement will not be made for expenses covered by other sources, or for expenses incurred by non-employees.
6. Reimbursement rates may vary depending on union, therefore, employee must select the bargaining unit which he/she belongs to at the top of the Travel Expense Voucher in order for the form to calculate the reimbursement.

B. Potentially Reimbursable Expenses

1. Registration or Tuition
 - a. Employees pre-approved for registration or tuition reimbursement must provide supporting documentation to demonstrate registration and payment.
 - b. Proof of attendance must be demonstrated through completion of the Conference/Seminar Assessment Form. This can include a copy of employee's name badge or certificate of attendance from the event.

2. Mileage

- a. Employees pre-approved for mileage reimbursement must provide a web-based map which illustrates the number of miles from start to destination.
- b. Mileage reimbursement is based on the rate which has been established for employee's bargaining unit or Board adopted rates for non-bargaining unit staff. Employee must select the appropriate bargaining unit at the top of the Travel Voucher Expense Form in order for the form to calculate the reimbursement.

3. Lodging

- a. Employees pre-approved for lodging expenses must provide an original bill including the number of days stayed and a breakdown of all charges. Employee must note the name of roommate on the Travel Expense Voucher if sharing room.
- b. Employees will be reimbursed at the lower of two (2) costs: actual cost or the per diem rate. To determine the anticipated reimbursement contact Human Resources when completing the Continuing Education/Library Business Request Form.
- c. Lodging reimbursement will be based on one-half the double-occupancy rate when room is shared with another individual.

- d. When lodging within New York State, an employee must complete the Tax-Exempt Form and provide it to the hotel upon check-in. Employee can contact HR or the Business Office to obtain the Employer Identification Number. Neither the Library nor Erie County is required to pay sales tax or hotel tax in New York State. Employees will not be reimbursed for taxes paid.

4. Meals

- a. Employees pre-approved for meal expenses will be reimbursed at the lower of two (2) costs: actual cost or the per diem rate. To determine the anticipated reimbursement contact Human Resources when completing the Continuing Education/Library Business Request Form.
- b. Reimbursement for meals requires detailed dated original receipts that list what you ordered. Credit card receipts and/or statements will not be accepted as proof of payment.
- c. Circle items on the original receipt for which reimbursement is being requested.
- d. Alcoholic beverages are not reimbursable.

5. Airfare

- a. Employees pre-approved for airfare reimbursement must provide an original itemized airline receipt, an e-ticket receipt/statement, or an Internet receipt/statement.

- b. Employees are expected to obtain the lowest available airfare that reasonably meets business travel needs.
- c. Employees should not choose air carrier based on ability to earn personal points, miles, or other rewards. In cases where such is awarded, employee must demonstrate said carrier was the lowest airfare available.

6. Rental Car

- a. Employees approved for rental car reimbursement must provide an original itemized statement.
- b. A compact or standard car should be rented unless additional people are traveling, or employee is transporting materials, and a larger vehicle is needed. Employee must note the name of the other passenger(s) on the Travel Expense Voucher if sharing a car. Reimbursement will be prorated to reflect non-employee passengers.
- c. Additional drivers are not allowed except when sharing the car with another Library employee traveling on the same trip. All drivers must be registered with the rental car agency.

C. Non-reimbursable Expenses

The following items will not be reimbursed by the Library:

Alcohol, costs incurred by traveler's failure to cancel travel or hotel reservations in a timely fashion, airline club memberships, airline upgrades, business class for domestic flights/ first class for all flights, personal telephone calls , child-care, babysitting, house-sitting, pet-sitting/kennel charges, haircuts and personal grooming, laundry and dry cleaning, passports, vaccinations, and visas when not required as a specific and necessary condition of the travel assignment, personal entertainment expenses including in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theatre movies, social activities and related incidental costs, travel accident insurance premiums and/or purchase of additional travel insurance, and other expenses not directly related to the business travel.

V. FORMS

All forms referenced in this policy are available on the Employee Intranet under "Forms, Policies, and Procedures." Please contact Human Resources (858-6103) if you have any questions.