

Wead Library  
**Conference and Travel Policy**

**Purpose**

There is a benefit to the Wead Library in having employees and Trustees attend conferences, meetings, seminars, and other training opportunities. Employees and Trustees are encouraged to participate in local, state, and national library conferences. It is often required that employees and Trustees are required to travel using their own vehicle at times to travel both in and out of the Malone Central School District. To encourage attendance, support will be provided for eligible expenses related to such travel subject to budget and stewardship of public funds.

Factors in the approval of an employee and Trustees participation in a work-related conference, seminar, or workshop will include the relevance of the opportunity to the employee's work, state education requirements, and prior participation in similar events, membership in the organization, and rotation of employees and Trustees for the purposes of equity of eligibility. Reasonable limits may be set on individual travel and training expenses to provide equitable opportunities for as many employees and Trustees as possible.

Travel is to be conducted in the most cost-effective and efficient manner. When alternative methods for travel and/or attendance are available, they should be used. These could include, but are not limited to:

- Tele-conferencing
- Video-conferencing
- Carpooling
- Coordinating between agencies for joint travel arrangements

The sections below define the rules for payment of employee and Trustee travel expenses.

**IRS Compliance**

The library will follow prevailing Internal Revenue Service (IRS) rules, regulations, or other directives regarding payment and reimbursement of travel and subsistence expenses. The IRS has designated certain travel expense reimbursements as taxable. To ensure that any travel expense reimbursement is NOT subject to tax, the following procedure has been established.

## **Eligibility**

This policy applies to all employees and Trustees authorized to travel on Library-related business.

## **Authorization**

All employee travel shall require prior approval from the Director or designee. Additionally, the Director or designee shall approve any Trustee travel related to training. The Director or designee shall decide whether employee participation will significantly benefit the Library and not unduly interfere with the employee's job responsibilities or ability of the Library to provide timely service to patrons. Considerations of staffing, budget, and appropriateness for the position will be weighed before any travel is approved.

## **Payment**

The Library will pay most training and travel expenses for employees and Trustees who are authorized to travel on behalf of the Library for business. Some expenses such as airfare, hotel, meals, ground transportation, and mileage will be reimbursed up to the limits set forth below.

Any employee or Trustee requesting reimbursement must provide documentation of dates, place, and purpose of trip when filling out the Travel Voucher Form.

## **Allowable Reimbursable Expenses**

### **Registration**

- The Library will pay the lowest available registration rate for a meeting, conference, or other professional development event unless otherwise approved. Early-bird discounts should be sought when available.
- The Library will pay for an employee or Trustee's membership to a sponsoring organization for a conference/training only when it provides a savings over the non-member rate and professional membership to the organization is not already covered under employment.
- When possible, registration will be prepaid by the Library.
- Pre-conferences, special meals, and additional fees above and beyond basic registration will be considered on a case-by-case basis.

### **Transportation - Air/Rail/Ferry**

- All travel will be by the most affordable option available.
- Receipts and boarding passes are required for proof of travel.

- If an employee chooses to travel at other times that are not based on meeting/conference dates and it results in higher travel costs, those additional charges will not be reimbursed.
- When a personal or extended trip results in a reduced fare, the Library will only reimburse for the actual amount spent, even if travel booked by the Library would have cost more.
- All meals, airfare and lodging will require adequate supporting documentation including a receipt from the hotel or lodging showing dates of the stay, room rate charged, and all other taxes and incidentals charged to the room. Copies of bank statements and/ or credit cards may be acceptable if sufficiently itemized. Airfare should include sufficient confirmation of the itinerary flown and proof of payment of all additional charges incurred such as baggage fees.

#### **Ground Transportation to/from terminals**

- The Library will ask multiple employees and Trustees traveling to the same destination to travel together to reduce costs when possible.
- Employees are asked to use the most economical form of ground transportation available. Uber, Lyft, and other ride-sharing services are acceptable.
- Receipts are required for reimbursement and proof of travel.

#### **Travel by vehicle**

- Mileage reimbursement for travel from a member of the Clinton-Essex-Franklin Library System location to another will be made to any employee.
- Reimbursement will also be provided when driving to present a library program or attend a conference, meeting, or workshop that has been approved by the Director or designee.
- Employees 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.
- For expenses incurred by authorized individuals while traveling or attending conferences or other activities related to the library the maximum mileage reimbursement rate will be the current IRS' standard deductible mileage rate which is presently 65.5 cents per mile for business miles driven for 2023.
- To be reimbursed for travel, an employee must submit a Travel Voucher Form. Employees and/or Trustees should include the applicable distance,

tolls, and parking fees and must attach supporting documentation to be reimbursed.

- Parking fees will be reimbursed for any Library business-related travel that requires paid parking.
- The Library is not responsible for any parking tickets received for illegal parking or failing to maintain a meter or time limit.

## **Subsistence**

- Per diem meals
  - The daily subsistence and per diem rates shall be the prevailing allowable rate for each locale as determined by the IRS. The rates set annually for each city by the IRS shall be adopted by the Library.
  - Per diem will be provided after the conclusion of travel or prior to an event with approval from the Library Director or designee.
  - For both the day travel begins and the day travel ends, per diem is prorated to three-fourths ( $\frac{3}{4}$ ) of the calculated allowance.
  - An employee is not required to submit receipts for per diem reimbursement.
  - Any meal included as part of a conference registration fee will be deducted from the per diem allowance. A person choosing not to attend a prepaid meal will not be reimbursed for the cost of a substitute meal.
- Reimbursement for meals not covered by per diem
  - Meals can only be reimbursed when:
    - Travel requires an overnight stay away from home (out-of-town) and no per diem was paid.
    - An event takes place in a business setting and expenses are directly related to Library business.
  - Cost of meals, including a 15% tip, but excluding alcoholic beverages, will be reimbursed at the IRS allowable per diem rate whenever the employee is officially representing the Library out-of-town.
  - An employee may request reimbursement if, at a business meeting, a meal is served, and the employee must pay.
  - For all requested reimbursements, a receipt is required.

## **Accommodations**

- Lodging

- Actual cost of hotel, motel, or rental property accommodations, including lodging taxes and parking fees included in any hotel or motel bill, shall be paid. Receipts are required for all hotel/motel/rental stays.
- Accommodation must be reasonably priced, and limit or remove the need for transportation back and forth to the meeting destination and parking accommodations.
- The Library asks employees to share rooms when possible to minimize the impact of accommodations on the budget.
- The cost of moderate accommodations as defined by the IRS per diem rates, within the destination area, will be used as the benchmark for the cost of reasonably priced lodging. Airbnb and other home sharing options are acceptable when competitively priced.
- For conferences in an urban area, the Library will favor the value of proximity to the venue over the savings afforded by staying further away.
- If a hotel/motel accommodation includes a spouse or non-Library traveler, reimbursement will only be for that portion of the expense attributable to the Library employee claiming reimbursement.

### **Non-Reimbursable Expenses**

- Travel paid/reimbursed by any other organization
- Valet or laundry services
- Meals and/or lodging costs when those items are included in a registration fee
- Tour bus fees or sightseeing tours
- Trip/travel insurance
- Fines, forfeitures, tickets, or penalties
- Personal entertainment (e.g., in-room movies, spa or exercise facilities, gambling, etc.)
- Tips for things other than servers at meals (bell hops, etc.)
- Wi-fi (permission granted based on job requirements)
- Alcoholic beverages or other controlled substances

### **Employee Hours Worked**

- Time spent traveling to and from work is excluded from hours worked.

- Time spent traveling during an employee's scheduled workday and as part of an employee's duties will be counted as hours worked.
- Employees will not be compensated for travel time spent going to or from an event held outside of Franklin County or a contiguous county if such travel was performed outside of the employee's normal working hours.
- Employees who attend conferences, meetings, seminars, and other training opportunities will not lose pay or leave accruals.
- Travel time will not be compensated for local travel from a nonbusiness 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.

#### **Cancellation of Travel or Failure to Attend**

In the event an employee or Trustee fails to use any pre-paid transportation, conference registration, or hotel reservation, even for reasons beyond their control, the employee may be required to reimburse the Library for any expenses paid on their behalf. Exceptions will be considered on a case-by-case basis by the Board of Trustees.

#### **Compliance with Americans with Disabilities Act (ADA)**

Library employees with disabilities shall be afforded equal opportunity to travel for official Library business even if the travel costs for the traveler will exceed what would normally be most economical to the library. Examples include but are not limited to: the need to provide auxiliary aids for hearing or vision impairment; or, mobility services. ADA supporting documentation attached to travel authorization and reimbursement claims shall remain confidential.

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

**Adopted:**

## Resources

Travel Policy - Jefferson County Library. (n.d.). [https://jclibrary.info/wp-content/uploads/2020\\_Documents/Travel\\_Policy\\_APPROVED\\_09092020.pdf](https://jclibrary.info/wp-content/uploads/2020_Documents/Travel_Policy_APPROVED_09092020.pdf)

“Employee Handbook - Buffalo & Erie County Public Library.” *Buffalo & Erie County Public Library PERSONNEL POLICIES AND PROCEDURES*, [www.buffalolib.org/sites/default/files/shared%20files/policies/BECPL%20EMPLOYEE%20HANDBOOK%202021.pdf](http://www.buffalolib.org/sites/default/files/shared%20files/policies/BECPL%20EMPLOYEE%20HANDBOOK%202021.pdf). Accessed 28 Aug. 2023.

Wead Library  
Malone Central School District Public Library  
Travel Voucher

Person submitting Travel Voucher: \_\_\_\_\_

Title: \_\_\_\_\_ Address: \_\_\_\_\_

Purpose of trip: \_\_\_\_\_

Expense (mileage)	Miles travelled	Amount per mile	Total amount per expense
Other expenses			

Total amount: \_\_\_\_\_

Certification: I, \_\_\_\_\_, certify that the services were rendered as stated above, and that no part thereof has been reimbursed to me.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Date revised: 10/4/2023