City of Bell

Travel Policy and Guidelines
Adopted on 7/08/2018

Revised:

(Version 4 - 7/09/2018)
I. OVERVIEW
The City of Bell recognizes the value and necessity of employees attending professionally related conferences, seminars and meetings of importance to City business. The City encourages these activities, and to accommodate them has established the following policies and procedures.

I. PURPOSE
The purpose of this policy is to provide uniform guidelines for authorizing and reimbursing the expenses associated with employees travel for City business.

II. DEFINITIONS
For the purpose of this policy, the following definitions will be used:

“Travel Status”: The City of Bell compensates all eligible City employees in accordance with the Fair Labor Standard Act (FLSA). A City employee will exercise good judgment and choose the most reasonably economical means of transportation.

“Training/Travel Authorization Form” (Attachment A): used to obtain approval for training, travel associated with training and to obtain monetary advances to pay for travel-related expenses and must be requested at least thirty (30) working days before the travel departure date.

“Training/Travel Expense Report” (Attachment B): Used to report actual travel expenses, reconcile advances, if any, and request reimbursement. The report must be submitted within thirty (30) days after the completion of travel.

“GSA”: The General Services Administration, a federal agency that sets per diem rates for Federal employees. The City of Bell has adopted the GSA rates and definitions for per diem.

“Normal Work Station”: The employee’s customary or permanent work location.

“Per Diem”: Daily allowance to cover meals and incidental expenses
“Incidental Expenses”: include items such as fees and tips for meals; fees and tips given to porters, baggage carriers, bellhops, hotel maids, flight attendants; and transportation between places of lodging or business and places where meals are taken.

III. GENERAL POLICY
The authority for all conference, training, and travel related to City business is established by the adoption of the annual Operating Budget.

It is the policy of the City of Bell to reimburse elected City officials, employees or commissioners for the reasonable and customary expenses associated with authorized travel for official business when necessary to accomplish the goals and objectives of the City and the work cannot be done from their normal work station.

IV. AUTHORIZATION
All business travel shall be approved in advance by the Department Director and, if out of state, by the City Manager. The City Manager shall approve travel by Department Directors. Department Directors are responsible for managing conferences and meeting expenses in conformance with these policies and procedures and must approve all such expenses and any exceptions, unless otherwise stated in this policy. Any personal travel, or additional expenses incurred by a guest traveling with an employee on City business travel, shall not be a City expense.

V. WHO IS COVERED
This policy applies to all City elected officials, employees or commissioners for the reasonable and customary expenses associated with authorized travel for official business.

VI. RESPONSIBILITIES
The Finance Department is responsible for the administration and enforcement of the travel advance, payment and reimbursement provisions of this policy. Each department is responsible for travel arrangements at the least expensive method possible.

VII. TRAVEL ARRANGEMENTS
Travel should be by the least expensive method available when such factors as total travel time, salary of traveler, availability of City or pooled transportation and cost of transportation are considered. Advanced planning for travel will usually allow for significantly reduced rates to be obtained. Abuse of this policy, including falsification of travel expense reports, will result in disciplinary action, up to and including termination of employment.
VIII. PROCEDURES

A. General

1. Employees must complete a ‘Training/Travel Request’ form and submit it in advance for approval from their Department Director. The City Manager must approve all travel requests from Department Directors.

2. A copy of the registration form, brochure, or agenda for the event must be attached to the request form. If there are no such documents, the employee must attach a memorandum to the request form describing the event, the name and address of the sponsor, the dates, cost, location and purpose.

3. Requests for travel advances must be submitted to the Finance Department at least thirty working days (30) before the travel date to allow for the advance process.

4. Reimbursement for travel will be at a rate established by the GSA. Maximum per diem reimbursement rates for lodging, meals and incidental expenses are established by city/county and vary by season. Original receipts are required for all lodging expenses. The rates can be found at www.gsa.gov.

5. Lodging and per diem are not allowed when an employee is within 50 miles of the City of Bell or their residence, depending on the origin of departure.

6. Out-of-State travel must be approved in advance by the City Manager or designee.

7. Exceptions may be approved by the City Manager.

B. Registration

1. Approved registration fees will be paid by the City directly to the company or entity conducting the training, conference or event. If it is not possible to arrange direct payment in advance of the event, the Finance Department may provide the employee with a check payable for registration, or alternatively, the employee will be reimbursed at the conclusion of the travel upon submission of the original receipt for the registration fee indicating the employee’s name and method of payment. Travel advances will not be issued to individuals to cover registration fees.

C. Transportation

1. Air Travel
   
   a. Air travel shall be coach class or its equivalent, except in exigent circumstances approved by the City Manager.
b. Air travel arrangements should be made in advance in order to take advantage of reduced rates. Approved airfare will be paid directly by the City to the travel agency or airline. If it is not possible to arrange direct payment, reimbursement will be made at the conclusion of the travel only upon submission of original receipts detailing the employee’s name, travel destination, and method of payment, along with the airline ticket receipt.

c. Employees parking a personal vehicle at the airport must use the least expensive available parking lot.

2. City–owned Vehicles

a. City-owned vehicles will be used if applicable. If a City-owned vehicle is not available, use of an employee’s personal owned vehicle may be permitted with the prior approval of the department director or designee.

b. Whenever possible, employees should carpool to reduce the cost of travel.

3. Use of Private Vehicles

a. An employee using their own vehicle for the City’s convenience will be reimbursed at the standard mileage rate allowed by the IRS, at the time of travel for the total miles involved and the most direct route to and from the destination point. Reimbursement requests shall indicate the destination, number of miles driven (reduced by the employee’s normal commute to/from work for full-day conferences) and must be approved by the department director. The mileage reimbursement rate will be indexed according to the rate allowed by the IRS, typically issued in January of each year.

b. If a person drives to a location to which he or she could fly, mileage reimbursement is limited to the most economical round-trip airfare rate for that destination. Employees shall document the most economical round-trip airfare rate at the time they register for the conference or know that they will be attending an event. Documentation needs to include a printout of the airfare cost for the proposed travel.

c. No mileage reimbursement of any kind will be allowed for employees who receive a vehicle allowance. However, mileage reimbursement shall be allowed for miles driven in excess of 100 miles per trip (50 miles each way)

d. Any employee using their own personal vehicle to conduct City business will be compensated for any miles driven in excess of their normal commute to their work station.
e. An employee may leave from his/her home for the meeting, conference, seminar or training session; however, the mileage paid from home to the destination and back may not exceed the mileage from City of Bell to the destination and back. Similarly, if an employee’s home is closer to the point of destination than the City of Bell, then reimbursement shall be made from the employee’s home and back, unless travel to City of Bell is required before or after the meeting, conference, seminar or training for business purposes.

f. Insurance on the employee owned vehicle is primary to any City coverage. Employees using their personal vehicle shall do so with the understanding that they are primarily liable from any incident or accident involving that vehicle.

g. Under no circumstances shall an employee drive an uninsured vehicle on City business or without a valid driver’s license. Any damage to the vehicle will be the responsibility of the driver.

4. Rental Vehicle
   a. Written justification for the use of a rental vehicle must be included with the training/travel request form and authorized in advance by the department director or City Manager. Reimbursement for a rental car generally will not be allowed when the employee is staying at the conference hotel/event site. Exceptions may be approved by the City Manager.
   b. Employees authorized to use a rental vehicle must purchase and will be reimbursed for, additional liability and collision insurance unless the credit card used for the rental expressly provides for this coverage. The City does not assume any responsibility or liability for the use of such a rental vehicle by any non-employee nor for the employee’s personal, non-City-business related use of the vehicle.

D. Lodging
   1. Lodging will be reimbursed at a rate not to exceed the GSA rate.
   2. Original receipts are required for all lodging.
   3. The City will not be responsible for excess lodging costs if designated approval is not obtained prior to incurring the expense.
   4. Employees are expected to stay at the conference center hotel, any hotels affiliated with the conference, or at a hotel with rates not in excess of the conference hotel. (If space is available at the conference hotel, and an employee wishes to stay at an off-site location, the City will not reimburse for expenses between the employee’s hotel and the conference).
5. Employees are encouraged to make reservations for travel and lodging as far in advance as possible so that the lowest possible prices may be secured. Employees are eligible for lodging on the evening before a conference which is scheduled to begin before noon the following day and on the evening of a conference which ends after 5:00 p.m. if the event is more than 100 miles from the City of Bell.

E. Per Diem

1. Employees who are in travel status are eligible for meal reimbursement at the per the rate outlined in MOU's or the Management Benefits Resolutions.

2. Per Diem rate includes taxes and tips in the rate, so employees will not be reimbursed separately for these items.

3. Employees are to deduct any meals furnished to them while in travel status. For example, a meal furnished during a conference or meeting; continental breakfasts are considered furnished meals and the employee should not claim those meals for reimbursement.

4. Incidental rate will only be included for employees whose travel include an overnight stay or is for over twelve (12) hours.

F. Miscellaneous/Other

1. Any other anticipated expenses must be explained in detail and submitted with the request form. The City Manager may deny reimbursements for improper receipts and improper expenses.

2. Items such as alcoholic beverages and the tax and tip associated therein, entertainment, in-room movies, etc., are not considered reasonable expenses and are not reimbursable.

G. Travel Advances

1. The City may advance employees money to cover anticipated travel expenses.

2. Employees in possession of a City credit card may request an advance only to cover the cost of meals; cash advances on the credit card are prohibited. The employee’s Department Director or City Manager must approve the request for a travel advance.

3. Travel advances will be issued to individual employees, and not on behalf of anyone else. Additional advances will not be issued to employees having outstanding advance balances.
4. Requests for advances must be submitted to the Finance Department at least thirty (30) working days prior to the departure date to allow for the disbursement process, including approval by the City Council.

H. Travel Time

1. The Portal-to-Portal Act specifically excludes from compensation time spent “walking, riding, or traveling to and from the actual place of performance of the principal activity” of an employee and time spent in “activities which are preliminary or postliminary” to the principal activity. Travel time at the beginning or end of the workday, therefore is not compensable. Note, however, that under the Portal-to-Portal Act, an employer must compensate employees for such time if agreed to in a contract or collective bargaining agreement, or if it is customary to do so.

   Excluding normal commuting time, the general rule is that employees should be compensated for all travel unless it is overnight, outside of regular working hours or on a common carrier, where no work is done.

2. An employee will be compensated only for the hours they would normally be working on the designated day of travel.

3. Travel time is compensable work time when it occurs during the employee’s regular working hours. This is true whether the employee actually performs work or not, since the employee is simply substituting travel for other work duties. If the travel occurs during normal working hours on non-working days (i.e. Saturday or Sunday for an employee who works on Monday to Friday), the time is compensable.

4. Overnight travel that occurs outside of regular working hours as a passenger on an airplane, train, boat, bus or car and where the employee is free to relax does not count as working time. In order for non-exempt employees to be compensated for working outside their normal regular hours they must have the approval of the Department Director and City Manager.

I. Training/Travel Expense Report

1. Employees must complete a training/travel expense report and submit it to the Finance Department within thirty (30) calendar days after the completion of travel. Each claimant must submit their own expense report, with required receipts, and approval signature. The City may refuse payment of claims submitted more than forty-five calendar (45) days after the completion of travel and expenses that do not conform to this policy.

   2. Original receipts are required for lodging, airfare and registration and for items not classified as Per Diem, such as rental vehicles, taxis, shuttles, copying, parking, etc.,
3. Employees will not be reimbursed for personal phone calls or alcoholic beverages.

4. Actual expenses must be reconciled to any advance payment. Employees shall reimburse the City for any unused advance payments and/or for unaccounted-for funds.

ADDITIONAL INFORMATION
Information regarding the City's policy on travel is distributed to all employees, and all employees may obtain a copy of this policy at any time from their supervisors.

Inquiries regarding the application of this policy may be directed to employee's supervisor, department director, human resources staff, or directly to the City Manager.
Acknowledge: TRAVEL POLICY FOR CITY OF BELL

City of Bell

Travel Policy - Acknowledgement of Receipt

I, ________________________________, (Print Name) acknowledge receipt of the City of Bell’s Travel policy.

I understand that I am responsible for reading, understanding and complying with the policy and standards of conduct referenced and contained in this document. I further understand that if I have questions regarding the policy or the issues addressed in the packet that I can discuss these with my supervisor or call Human Resource Department at extension x2613.

Employee Number: ______________________

Signature: ___________________________ Date: ______________________

Department: ________________________