Travel, Training, Per Diem and Lodging Policy

Traveling for the business of the Umatilla County Special Library District (UCSLD) is a necessary method of strengthening our community libraries. All travel is subject to approval and the UCSLD budget. Travel requests are approved by the District Director for UCSLD staff and by the UCSLD Board President *or their designee* for the District Director. The following are considerations for use of UCSLD resources for travel:

General Provisions:

- Employees will be reimbursed for travel expenses incurred in the performance of their work.
- Travel occurs only when there is a substantial UCSLD business reason and it is properly documented and approved.
- Methods of travel should be considered that save time and/or money for the UCSLD.
- A Pre-Approval Training/Travel Request Form shall be submitted to the appropriate person for approval as much in advance of the travel as possible.
- The request should estimate the costs and budget account to be charged for the following:
    - Transportation
    - Conference, Training or Workshop fees/costs
    - Lodging
    - Meals
    - Miscellaneous expenses related to the event
- Any employee of the Library incurring expenses for Library related business shall be reimbursed as follows:
    - Official travel in privately owned vehicles shall be reimbursed in accordance with the the Federal mileage rate for business-related matters.
    - Air travel shall not be first class unless other rates are unavailable. Under reasonable circumstances, or for necessary expediency, the Board may authorize other travel means.
    - Lodging shall be reimbursable at the actual expense. Receipts must be provided for all lodging.
    - Parking, tolls, and public transport shall be reimbursable at the actual expense. Receipts must be provided for all parking, tolls and public transport.
    - Conference and registration fees shall be approved in advance by the District Director, and may be prepaid when necessary and appropriate.
    - Use of rental vehicles is allowed when more feasible than other types of available transportation.
        - The UCSLD will reimburse an employee for meals during travel for the UCSLD. See the Travel, Training, Per Diem and Lodging Procedure for guidelines.

    - All expenses should be reported on the Travel Expense Reimbursement Form and submitted for District Director and/or Board President approval.
    - Other necessary expenses which were unforeseeable prior to travel may be approved by the Board upon presentation of documentation of the need for such expense.
- The credit cards held by the UCSLD staff shall be used for allowable expenses according to the UCSLD policy and procedures.
- Receipts shall be submitted for credit card use and for reimbursement of allowable expenses paid by staff members or UCSLD board members.
    - A receipt shall contain: 1) the name of the establishment where the item(s) were purchased; 2) the date the item(s) were purchased; and 3) the amount of the purchase.

Expenses not in compliance with the travel policy will not be reimbursed or paid by the Board, such as costs incurred by family members or staff attendance at events not approved by the Director or the Board.

Travel:

- Allowed for meetings, for site visits, for workshops, for conferences, for training and other approved events.
- All UCSLD staff private auto travel will be reimbursed at the Federal mileage rate for business-related matters.
- All UCSLD travel outside the state of Oregon needs clearance gained through the Pre-Approval Training/Travel Request Form. Exceptions to this policy are travel to Walla Walla and the Tri-Cities, Washington.
- The UCSLD Board members may be reimbursed at the Federal mileage rate for Board approved travel.
- Board members may be reimbursed for round trip mileage to meetings of the UCSLD Board of Trustees, if their one-way mileage is over 10 miles.

Per Diem:

- Allowed for meetings, for workshops, for conferences, for training and other approved events. Meals are not reimbursed for site visits within Umatilla County.
- For the UCSLD Board of Trustees and staff members, for full day and overnight travel, see the Travel, Training, Per Diem and Lodging Procedure for guidelines.
- For partial day travel, meal cost reimbursement, see the Travel, Training, Per Diem and Lodging Procedure for guidelines.

Lodging:

- Lodging for UCSLD travel and training will be reimbursed at the actual cost. See the *Travel, Training, Per Diem and Lodging Procedure* for guidelines.