

Conference and Travel Reimbursement Policy

Pursuant to New York State Education Law, all trustees are required to complete a minimum of two hours of trustee education on topics related to their duties annually. Moreover, in order to promote job-related development, the Library strongly encourages all trustees and employees to participate in professional conferences, workshops and seminars, time and funds permitting.

Requests for attendance will be submitted in a timely manner prior to the conference/workshop using the Meeting Request Form or the Conference Request Form. Training requests should also include a type written summary of goals and potential impact of training. The Director will consider the following in determining library support for conference attendance:

- Trustees attendance for purposes of compliance with annual minimum training requirements
- Availability of staff to support ongoing library services to the public
- Membership in the sponsoring organization
- Relevancy of the conference program to the duties of the individual
- Role of the individual at the conference
- Cost to the library
- Attendance of the individual at other recent conferences
- Availability of funding

Management reserves the right to limit the number of staff attending a single conference if conference attendance negatively impacts the workflow of the organization. Where there is a large amount of interest, staff attendance at conferences will be on a rotation basis. Staff members who are involved in the program or the preparations for the meeting may be allowed to attend on Library time with reimbursement for both meals and transportation. All traveling staff will be credited for a 7-hour work day for each day spent at conference and for travel days to and from the conference, provided, however, that employees shall be required to report to work in the event that a conference is local and does not require a full day's attendance. Sunday rate is not included. Overtime will not be granted for extended conference and travel days. A written report is expected within two weeks upon return from the conference.

Allowable Expenses

Reimbursement will be made for all or part of pre-approved actual and reasonable expenses incurred for registration (early registration discounted amount), transportation (including taxis, airport shuttles and public transportation), meals, lodging, and other necessary business expenses. All eligible expenses up to the prior approved amount for the conference

are reimbursable. Expenses must be reported on an actual cost basis (substantiated with original itemized receipts or facsimile approved by the Library Director). Whenever possible, conference registration and travel reservations may be made on the library's credit card. Staff are encouraged to coordinate expenses whenever possible, such as through carpools or shared taxis used at the conferences.

Meals

The Library will reimburse travelers up to \$65 a day for the cost of their own meals. Tips and alcoholic beverages are not reimbursable.

Lodging

Lodging reservations are the initial responsibility of the employee. Travelers should use recommended conference hotels, when appropriate. Since hotel reservations are typically guaranteed to assure lodging for late arrivals, travelers are required to cancel these reservations in a timely manner to prevent no-show charges or the individual will be held responsible for these charges. The library is a sales tax exempt organization. Prior to traveling, the employee should contact the Business Office to obtain a Tax Exemption certificate if planning to stay at a hotel in New York State only. Tax Exemption Certificates are not valid outside of New York State.

Travel and Related Expenses

Travel within the New York metropolitan area for under \$750.00 in expenses must be pre-approved by the Director. Overnight travel beyond the New York metropolitan area and/or costing over \$750.00 must be pre-approved by the Director and the Board of Trustees.

Air and rail travel will be reimbursed for coach fare only and can include one checked bag. Air travel is restricted to regularly-scheduled commercial airlines. All travel arrangements should be made in advance, as airfare booked early can often be obtained at a much lower rate. Before committing to a deeply discounted ticket carrying a substantial penalty for cancellation, individuals should make certain that they can adhere to the planned itinerary.

Lost baggage, clothing, or other personal items are the responsibility of the traveler. While library equipment is covered by Library insurance, the Library will not assume responsibility if damage to personal equipment occurs during conference travel.

Personal Automobile Use and Mileage

Reimbursement for use of personal vehicles for library business will be at the IRS mileage rate, effective January 1 of each year. Examples of travel expenditures include, but are not

limited to, travel to purchase supplies; to empty book drops, travel to provide outreach services, travel to approved conferences and workshops. Employees assigned to work at one or more library buildings in a single day are not eligible for mileage reimbursement traveling to or from their assigned shifts; however, employees needing to travel back and forth between buildings for other purposes, such as to attend a meeting/training or to substitute, may request mileage reimbursement with *the prior approval of their supervisor or administration*. Employees cannot be reimbursed for trips home. Request for mileage reimbursement can be made by entering pre-approved reimbursable trips using the Mileage Reimbursement Form (Appendix A).

There is no coverage for personal cars and no reimbursement will be made for the cost of repairs to personal vehicles, regardless of whether the costs result from business travel or whether they result from acts of the traveler or another individual. It is the obligation of the owner of a personal vehicle being used for Library business to carry adequate insurance for his or her protection and for the protection of any passengers. In the event of an accident, the employee is responsible for his/her own auto insurance deductible. Workers comp will cover an employee if they are on Library business; however, there is no coverage for the employee if they travel during a break for personal matters.

Non-Reimbursable Expenses

The library will not reimburse travelers for expenses that are inherently personal in nature, nor provide reimbursement for the travel expenses of spouses or others who accompany employees on library business or for an extension of stay after the conference end date.

Adopted by the Board of Trustees 2018; Revised September 17, 2024.

Appendix A:

Mileage Reimbursement Form

Submit the calendar as an invoice to the Business Office monthly or quarterly, as long as the quarter is not split between fiscal years (June/July),

Month/Year:

NAME: _____

DATE:

MILEAGE REIMBURSEMENT TOTAL:

Mileage Reimbursement

- Mileage for business travel and travel associated with library meetings will be reimbursed at the IRS Mileage Rate in effect at the beginning of each contract year (currently .670%).
 - **Examples of travel that can be reimbursed:** book drops, purchasing supplies, outreach services, approved conferences and workshops.
- Mileage cannot be reimbursed for trips home, the mileage always covers from PML to the destination and back to PML, since it functions as a work day trip.
- Mileage should be submitted to the business office in a calendar format either monthly or quarterly as long as the quarter is not split between fiscal years (i.e. June and July).
- Use the Standard Mileage List to calculate mileage for common places that employees drive to/from during their work day.
- Use google maps for locations that are not on the Standard Mileage List.
 - If google maps gives you multiple routes, use the mileage for the quickest trip time.

How to Submit Mileage Reimbursement

1. Write on the calendar for each day you used mileage with a breakdown on where you went.
2. At the end of month/quarter, add up all miles traveled to get a total mileage for the period.
3. Multiply the total mileage by the current IRS Mileage Rate (.670%) and round that number to the nearest penny. This will be your total for your mileage reimbursement (Ex: 43.8 miles x .670 = 29.346, rounds up to \$29.56). ***Write this total on the bottom of the calendar.***
4. After getting total for your mileage reimbursement, submit your calendar as an invoice to the Business Office.

<u>MILEAGE FROM PMLIB TO:</u>	<u>ONE-WAY MILES</u>
Barton Elementary	2.4
Bay	0.8
Canaan	1.8
Eagle	6.3
Medford Elementary	1.2
River	0.7
Tremont	3.4
Oregon Middle School	3.9
Saxton	1.8
South Ocean Middle School	0.4
Pat-Med High School	4.4
Pat-Med District Office	0.4
SCLS	3.5
King Kullen	1.5
Costco	2.0
Best Market	1.4
Brentwood Library	15.3
South Huntington Library	23.8
Farmingdale Library	27.7
SBU Library	14.0
Medford Branch	5.1