

Travel Policy

Adopted 4/23/2025

Training and conferences are important enrichment opportunities to provide BCHC staff and board with the skills needed to carry out all duties. At times, these require BCHC to incur travel costs. The traveler is responsible for complying with the travel policy and procedures, ensuring that both their travel arrangements and claim for reimbursement meet BCHC's rules and have been approved by the Director.

Employees are expected to:

- Exercise good judgment with respect to expenses.
- Use the most direct and economical transportation, taking into consideration travel time, absence from BCHC, and convenience.
- Report all expenses promptly and accurately with required documentation.

Travelers who do not comply with this travel policy may be subject to:

- Delay or withholding of reimbursement.
- Disciplinary action.
- Appropriate management action, up to and including termination.

Travel Status

An employee, the Director, or Board member is on travel status while away on authorized BCHC business. Travel status begins when they leave the agency, their residence, or other authorized location to go directly to their destination. Travel status ends when they returns to BCHC, their residence, or other authorized location after completing the business.

Travel Planning

All travel must be authorized and approved by the Director before registration or accommodation is arranged. A training travel plan should be submitted to outline the session type, purpose of training, who should attend, who is sponsoring/hosting the event, agenda for the training, and the costs. The Director will determine the allowable expenses. Travel arrangements should be made by the employee traveling. It is the responsibility of the employee to ensure that the least expensive arrangements are made. Coach fares or other economy-class means of transportation should be used at all times. If such accommodation is unavailable, the employee must submit documentation verifying the reason for the upgraded class.

Accommodations/Exceptions to Policy

The Director has sole authority to approve exceptions to the provisions of this policy. Exceptions needed for the Director should be directed to the Board President or the Vice President. Should medical accommodation be requested/required, a request should be made to the Director. Exceptions may be allowed if following the policy would:

- Require circuitous routing.
- Require travel during unreasonable hours or weather.
- Excessive prolonged travel.
- Require greatly increase the duration of travel.
- Result in increased costs that would offset potential savings.
- Be inadequate for the medical needs of the traveler.

The Director must approve justification for any of these exceptions in advance and be provided with documentation.

Travel General

All use of privately owned vehicles will be reimbursed at the current IRS standard per mile rate. When official BCHC business requires the use of a privately owned vehicle, proof of current active automobile insurance must be provided to the Director on the vehicle to be used. The Director shall maintain files and periodically review policies to ensure current coverage.

Personal Leave During Business Travel

Personal leave (i.e., vacation days) taken before or after business travel must be requested in advance from the Director and plans should be discussed to be sure that it fits BCHC policy. Returning transportation must be done at the lowest cost and at the earliest available time once business duties are completed. If other arrangements are needed, they must be documented and approved by the Director or Board.

Reimbursable Miscellaneous Expenses

The following are reimbursable expenses when traveling on BCHC business. Receipts are required for reimbursement unless specifically stated below.

- Checked Baggage. The first checked bag is permitted. Additional checked bag(s) require preapproval.
- Use of computer, printer, fax machine, scanner, including internet connection fees when used for BCHC business.
- Official BCHC telephone calls if charged a fee.
- Lodging taxes.
- Laundry or dry cleaning if travel is more than four consecutive nights or longer at a maximum claim amount of \$20 for the first four days and \$5 for each additional night.
- Energy surcharges and lodging resort fees are permitted when not optional for travel.
- Road, bridge, tunnel toll charges and parking fees.
- Taxi fares and tips do not require receipts if under \$25, however the claim amount must be accurate and detailed with time, company paid to, and date.

Non-Reimbursable Miscellaneous Expenses

The following expenses will not be reimbursed.

- Alcoholic beverages.
- Coat check.
- Collision damage waiver insurance for motor vehicle rental.
- Commuting expenses between an employee's residence and BCHC.
- Personal entertainment charges such as movies, spa/health clubs, sightseeing tours, etc.
- Keys locked in personal vehicle.
- Late check out and room guaranteed charges.
- Non BCHC related expenses.
- Parking tickets or other traffic fines.
- Personal automobile accident insurance.
- Spouse/family travel expenses.
- Tobacco products.
- Towing of a personal vehicle that is being used for BCHC business travel.
- Travel insurance.

Travel Advance

Advance requests shall be restricted to travel extending more than one day. Any travel advance requests must be given to the Director who will evaluate the expenditure for appropriate business use. If the Director deems any charges on the receipt unapproved and personal, the employee will be required to reimburse BCHC for the unauthorized charges.

Allowable Meal Expense

Meals that are served at trainings/conferences/seminars will not be reimbursed unless there is an extra charge by the training for the meals or if the meal is known to not be sufficient as authorized by the Director. Staff are expected to take advantage of meals provided with registration at training. All meals not included in the training will be reimbursed based on the current FY Per Diem Rates according to the GSA-US General Services Administration at <https://www.gsa.gov/travel/plan-book/per-diem-rates>. Rates are dependent on the location of the training. A copy of the current Per Diem rates for travel locations should be included.

Eligibility for per diem reimbursements will be based on the departure time for travel and return time per the following:

Breakfast: Leave prior to 7 am, Return after 9 am

Lunch: Leave prior to 11 am, Return after 1 pm

Dinner: Leave prior to 4 pm, Return after 6 pm.

If meals are charged to the corporate credit card, then the actual cost up to allowable limits will be used and a credit card receipt shall be required. Any receipt amount which exceeds the standard rate may not be fully approved and the excess amount deemed personal by the Director. Receipts will not be required for meals not charged to the corporate credit card.

Allowable Lodging Expense

BCHC uses the U.S. General Services Administration (GSA) website (www.gsa.gov) or Conference Headquarters as a guideline for allowable lodging rates. When the training or conference has bulk room rates, the trainee is expected to register for a room in the room block unless circumstances do not allow it, or the cost is unreasonable when reviewed by the Director. When possible, prepaying for lodging should occur with the company credit card. If travelers pay out of pocket for lodging, they will be reimbursed for the actual costs as long as the costs are allowable in the policy. A receipt is required for all lodging. The housing authority will not reimburse a traveler where the lodging is with friends or family. Lodging accommodations reimbursement is allowed based on each specific conference/training with the following guidelines:

- When the expected arrival time is 8:00 am or earlier and you are more than 50 miles away from your home.
- When expected attendance ends at 5:00 pm or later, and you are more than 50 miles away from your home.

Transportation

The traveler will be reimbursed for the actual cost of the ground transportation. Options include BCHC owned vehicle, car rental, taxi or ride sharing service, and personal vehicle.

- BCHC owned vehicle: When a BCHC owned vehicle is available for travel, it should be used, and the traveler will not be allowed to claim mileage.
- Car Rental: Car rentals are generally the most expensive mode of transportation and should be used when the nature of the trip is such that the other options are not possible or appropriate. When used, it should be shared to the maximum extent possible by employees traveling together. The overall cost should be appropriate to the size needed for travel. In-car navigation and electronic toll payment options are reimbursable. Convenience options are non-reimbursable.
- Taxi and Ride Sharing Services: These options should only be used when other less expensive forms are not available. Travel arrangements should be made to eliminate the need for this transportation. When they are used, they should be shared to the maximum extent possible. Travelers will be reimbursed for the actual costs of travel associated with business travel. A tip of not more than 15% is allowed and reimbursed. A receipt is required for reimbursement.
- Use of Personal Vehicles: Personal vehicles used for BCHC business will be reimbursed at the prevailing IRS rate per mile. Mileage should be fully documented.

Local Travel

Local travel will be allowed only when approval has been received from the Director on the "Expense Reimbursement Form." Local travel must be only what is required or in the performance of the job. Unnecessary local travel including the following will not be reimbursed:

- Travel between the normal place of work and employee's residence.
- Travel of personal nature
- Transportation is provided as a friendly gesture to friends, neighbors, and co-workers.
- Travel and transportation that is not directly connected with the performance of required duties and functions.

Cost Savings Measures

If travel requires a higher cost to return at the first available time, and it would be more cost effective to stay more nights in the location, that option should be presented to the Director.

Travel Reconciliation

When returning from travel, reconciliation of all costs associated with the trip must be done within 15 business days of the return and provided to the Director. If the traveler owes money to BCHC after this return, they must have this paid within 30 days.

Travel: Responsible Conduct and Alcohol Consumption

This policy outlines guidelines for employees conduct during company-sponsored travel, with a specific focus on responsible alcohol consumption. This policy applies to all employees traveling on company business, regardless of their role or destination.

- **Professional Representation:** Employees represent the company at all times during business travel, including during downtime. Conduct should reflect positively on the company's image and values.
- **Respect for Local Laws and Customs:** Employees must adhere to all local laws, regulations, and cultural norms. This includes respecting local drinking ages and customs related to alcohol consumption.
- **Respect for Others:** Employees are expected to treat all individuals, including colleagues, clients, hotel staff, and members of the public, with courtesy and respect. Discriminatory, harassing, or offensive behavior is strictly prohibited.
- **Company Property and Resources:** Employees are responsible for the proper use and care of company property and resources, including rental vehicles, hotel rooms, and electronic devices.
- **Communication:** Employees should maintain regular communication with their supervisors and colleagues, especially regarding travel plans and any changes to their itinerary.
- **Responsible Consumption:** Employees are permitted to consume alcohol during downtime, provided it is done responsibly and in moderation.
- **Excessive Consumption:** Excessive alcohol consumption that impairs judgment, interferes with work responsibilities, or leads to inappropriate behavior is strictly prohibited.
- **Work-Related Events:** During work-related events, such as client dinners or conferences, employees should exercise discretion and follow the lead of the host regarding alcohol consumption.
- **Pre-Work Responsibilities:** Employees must be fit for duty and unimpaired by alcohol prior to any work-related activity, including meetings, presentations, and travel. This includes adequate sleep.
- **Driving:** Driving under the influence of alcohol is strictly prohibited. Employees must use alternative transportation, such as taxis, ride-sharing services, or public transportation, if they intend to consume alcohol.
- **Public Intoxication:** Public intoxication or disorderly conduct is unacceptable and will result in disciplinary action.
- **Company Liability:** Employees should be aware that their actions, including those related to alcohol consumption, can have implications for the company's liability.
- Employees are responsible for ensuring they are aware of and comply with all local laws regarding alcohol purchase and consumption.
- Employees who have a history of alcohol-related problems or who are taking medications that may interact with alcohol should exercise extreme caution and consult with their physician before consuming alcohol.
- Employees who witness or experience inappropriate behavior related to alcohol consumption should report it to their supervisor immediately.

Failure to comply with this policy may result in disciplinary action, up to and including termination of employment. By engaging in company-sponsored travel, employees acknowledge that they have read, understood, and agreed to comply with this policy.

Director Travel

The Director will follow the same guidelines and procedures as BCHC employees and if required, the Board President or Vice President can approve plans, and another BCHC employee can verify information if needed.

Board of Commissioners Travel

The Board will follow the same guidelines and procedures as BCHC employees when there is a Board approved conference or training.