



Conference and Travel Policy

The Geneva Public Library (GPL) encourages its employees to take advantage of local and regional library training and professional development opportunities. GPL annually budgets staff development funds to allow staff to attend job related workshops and meetings and to travel to conduct official Library business. The Conference and Travel Policy ensures that staff requests for professional development are awarded equitably.

Attendance at workshops, meetings, courses, and conferences, when pertinent to the requestor's job duties or professional development, and approved by the Director, will be considered as scheduled hours worked. As justification for attendance, the Director may require the requestor to speak about the professional development opportunity at a future staff meeting.

The Library encourages all employees to attend staff development events. Priority in approving requests will be given to those requestors that have been selected to present or receive awards at conferences or events, or who have received financial assistance to attend specific conferences. The Director reserves the right to deny requests and to reserve funds for other staff members to attend future events.

1. Approval

Requests for local trainings that have no costs beyond hours worked and mileage reimbursement require the requestor to place an offsite meeting request through the Library's payroll system noting the name and location of the training. Staff seeking reimbursement for trainings with additional costs besides mileage must complete and submit to the Director a Conference/Staff Development Form prior to registering for the training.

A copy of the Conference/Staff Development form will be returned to the requesting staff member as soon as possible after a decision is made, indicating either:

- a. Approval of funding and amount approved
- b. Request denied and an explanation of the reason for denial

The Director's overnight conference expenses require pre-approval by the Board of Trustees at a regularly scheduled Board Meeting. If pre-approval by the Board of Trustees at a regularly scheduled Board Meeting is not possible, the Board President may approve the Director's travel.

2. Reimbursement Procedure

All receipts for professional development expenditures should be submitted to the Finance Clerk within two weeks of the staff member's return. General mileage reimbursement should be submitted via the Mileage Reimbursement Form within two weeks of the travel date. Receipts that are not submitted in a timely manner may impact the Library's options for reimbursement from the Pioneer Library System (PLS). Late submissions may cause the requesting employee to lose their eligibility for reimbursement. Expenses incurred without a receipt will not be reimbursed.

2.1 Conference/Workshop/Course Fees

The Library will pre-pay an event registration if a registration form is submitted and approved. If the requestor pays for the registration fee using their own funds, they will be reimbursed after the event. In the latter case, the requestor must present a receipt for the registration fee and proof of attendance, at the discretion of the Finance Clerk or Director, to be reimbursed.

The Director may reimburse membership fees, pre- and post-training event costs, and other ancillary costs in instances where those costs will provide the Library savings on other expenses. For webinars and other online events, staff should inquire with the Pioneer Library System about whether the system would like to register and hold a group viewing.

2.2 Transportation

Staff members should take advantage of public transportation and cost savings opportunities for local transportation.

2.2.1. Personal Vehicle

The Library will reimburse mileage, at half of the IRS Standard Mileage Rate, and any applicable tolls. When two or more staff attend the same event, staff are expected to carpool unless a justifiable reason prevents it. The Library reserves the right to limit mileage reimbursement if staff do not carpool without a justifiable reason.

When two or more staff travel together, only one will be reimbursed for the mileage allowance. When submitting for mileage reimbursement the requestor may be asked to provide a copy of the travel directions. The directions must include the address of the training as a destination, the address of the Library or requestor's home (whichever is closer to the training location) and the trip distance in miles. The Finance Clerk or Director will review the trip information for approval and reserve the right to edit the request or request additional documentation.

2.2.2 Rental Car

A rental automobile may be used when renting is considered to be more advantageous than other means of transportation. The need for a rental automobile must be outlined in the Conference/Staff Development form.

2.2.3 Air Travel

Pending approval, staff members must make airline reservations using the Library's credit card under the guidelines of the Library's Corporate Credit Card policy. Reservations should be made for economy class fare. Reimbursement for business or first-class airfare is not allowed.

2.2.4 Other Forms of Transportation (Train, Bus, etc.)

These forms of transportation are allowed but should not exceed the commercial airfare that would be reimbursable for the same trip.

2.2.5 Parking Fees

Reasonable and necessary costs for automobile parking will be reimbursed when there are no more practical options available. Requestors must present a receipt or a copy of their credit card statement that clearly indicates the parking fees in order to be reimbursed.

2.3 Lodging

The Library will pay for the cost of lodging within a reasonable level, at the discretion of the Director. Pending approval, staff members must make lodging reservations using the Library's credit card under the guidelines of the Library's Corporate Credit Card policy.

When a staff member is attending a conference and conference rates are given at various hotels or motels, the staff member should make reservations at one of these locations. Other lodgings may be booked but should not exceed the cost of hotel or motel conference rates.

When two or more staff attend the same event, staff are required to share lodging unless a justifiable reason prevents it.

Exercise facilities, movies, or other forms of entertainment are not reimbursable Library travel expenses.

2.4 Meals

Meals while attending conference or staff development trainings will not be covered unless they are included in the conference registration fee or included as allowable expenses for continuing education scholarships or grants.

Expenses for alcoholic beverages will not be reimbursed.

Whenever possible, receipts for meals should include an itemized list of what has been purchased.

2.5 Miscellaneous

Other expenses will be reimbursed if determined to be reasonable and necessary, and if supporting receipts, documents, etc. are provided.

2.6 PLS Reimbursement

PLS offers mileage reimbursement to member libraries for travel to and from PLS sponsored meetings, including Monthly System meetings, System and Central Library workshops and trainings, PLSDAC meetings, County Advisory Council meetings, PLS Board meetings, and PLS Committee and Subcommittee meetings.

The reimbursement request deadlines for the two six-month periods are the first weeks of June and December. Library staff should submit requests for PLS reimbursement, via the Library's Mileage Reimbursement Form and/or the PLS Travel Reimbursal Claim form, to the Finance Clerk for all applicable travel. The Library Director or Finance Clerk will send out a reminder regarding those deadlines.

PLS offers Continuing Education Grants for member library staff to attend conferences and workshops. The Library Director will coordinate the reimbursement for all Continuing Education Grant expenses. Staff receiving grants are responsible for maintaining proper receipts.

Employees do not receive reimbursement from both the Library and PLS. For all reimbursable expenses, the Library uses PLS funds to offset the reimbursements paid to staff.

2.7 Tax Exemption

Whenever possible, staff should apply the Library's tax exemption to all purchases.

3. Additional Savings Opportunities

Staff should take advantage of early registration, conference room rates, and any other discounts associated with their travel (e.g., double-room occupancy, etc.). While not necessarily a requirement for attendance, the availability of these opportunities may be a determining factor in the Director's approval of a conference/staff development request. Failure to obtain cost savings may result in denial of the request or amendments to approved reimbursements for the request.

Adopted by the Library Board: April 30, 2014

Amended by the Board of Trustees: 7/29/2015, 7/27/2016, 5/31/2017, 7/26/2017, 7/25/2018, 7/24/2019