

TRAVEL, TRAINING, AND RELOCATION COST POLICY TOWN OF WATERBURY

Section 1: Title, Authority, and Purpose

This policy shall be known as the "Town of Waterbury Travel, Training, and Relocation Cost Policy." It has been adopted by the Town of Waterbury Select Board pursuant to 24 VSA § 872.

The purpose of this policy is to provide guidance to Town employees regarding travel and training costs and reimbursements as well as relocation costs for current or new hires. This guidance is compliant with the provisions of Title 2, Part 200 of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards ("Uniform Grant Guidance").

Section 2: Definition

The Town shall reimburse administrative, professional and support employees, and elected officials for travel and training costs incurred in the course of performing services related to official business or as a federal grant recipient.

For purposes of this policy, travel costs shall mean the expenses for transportation, lodging, subsistence and related items incurred by employees and elected officials who are in travel status on official business, including any business related to activities performed as a federal grant recipient.

Training costs shall mean the expenses for registration, transportation, lodging, subsistence and related items incurred by employees and elected officials who are in training status on official business, including any business related to activities performed as a federal grant recipient.

Relocation costs are the costs of travel for the staff member and family to the position assigned, including transportation, food, and lodging, travel for trips necessary to secure living quarters and temporary lodging. In all cases, the individual must already have an appointment to the Town in place and a reimbursement agreement for any payment or reimbursement to be made.

Section 3: Delegation of Responsibility

Elected officials and Town employees shall comply with applicable Town policies and procedures established for reimbursement of or payment for travel and training as well as other travel/training-related expenses. The validity of payments for such costs for all Town employees and elected officials shall be determined by the Municipal Manager or his/her designated employee.

Section 4: General Guidelines for all Employee Travel and Training Costs

The following guidelines apply to both non-federally funded and federally funded costs. In addition to these guidelines, federal funded travel and training must follow those provided in section 5.

Conference Attendance. A professional conference is a formal meeting, typically hosted by a professional organization, in which many people gather, usually for several days, in order to discuss ideas or problems related to a particular topic. A conference is typically organized around a published program of presentations, key-note addresses, panel discussions, and other such events. The cost of attending a conference, including the conference registration and associated travel costs, is allowable if:

- 1) The employee or elected official is presenting project related research results or other project outcomes. OR
- 2) If the employee or elected official can document that the focus of the conference, or the conference presentations the attendee will be attending, is directly related to their job or function, or to the federal award being charged.

Training costs shall be paid upon receipt of documented evidence of a conference or class, which may include a registration form or invoice for the training. The training must be pre-approved by the Municipal Manager and, when possible, should be included in the departmental budget.

Costs for meals, lodging and other related expenses from travel or training are allowed and will be reimbursed, provided they are reasonable reimbursements for such costs and are applied in similar circumstances across both federally-funded and non-federally funded Town activities. The Municipal Manager shall determine whether such costs are reasonable based on the geographic location of the training and the type of costs incurred and may reimburse for 100% of the costs or less based on these factors.

Reimbursement of relocation costs for non-federally funded programs are made at the discretion and with approval of the Select Board. Such reimbursements shall be made only upon receipt of itemized and verified invoices and in accordance with the established accounts payable procedures of the Finance Department and with the proper authorization.

All travel and training cost reimbursements must be supported by the appropriate documentation in accordance with the established accounts payable procedures of the Finance Department and with the proper authorizations.

Air Travel. Employees traveling to conferences or training may charge no more than the lowest possible air fare. In most circumstances, this is a non-refundable (restricted) economy class airfare. Airfare costs in excess of the lowest economy fare are permitted when such a fare would:

- 1) Require circuitous routing.
- 2) Require travel during unreasonable hours.
- 3) Excessively prolong travel.
- 4) Result in additional costs that would offset the transportation savings.
- 5) Offer accommodations not adequate for the traveler's medical needs.

The traveler is responsible for documenting these exceptions.

Lodging Costs. Costs for lodging should be reasonable, of clear benefit to the Town or the federally funded project (if applicable), and in keeping with the Town of Waterbury Travel, Training and Relocation Cost policy. The costs of mini-bar charges, in-room movies, and of hotel stays that exceed the inclusive dates for a conference should be paid by the traveler and not charged to the Town or a federal award.

Ground Transportation. Reasonable travel-related ground transportation costs in keeping with the Town of Waterbury Travel, Training and Relocation Cost policy are also allowable. The use of a rental car should be limited to situations where it is the most economical form of transportation available. Documentation of this should be provided. Rental car costs incurred for personal use, such as sightseeing, are not allowable.

Section 5: Other Guidelines for Federally Funded Costs

The Town shall follow the provisions of Title 2, Part 200.464 and Parts 200.472 through Part 464 of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards ("Uniform Grant Guidance") for all federally funded travel and training payments or reimbursement.

If costs for lodging, other subsistence, and incidental expenses are charged directly to the federal award, documentation must be maintained that justifies the following: 1) Participation of the individual is necessary to the Town, the department, or the federal award if it is related to a federally funded program. 2) The costs are reasonable and consistent with this Town of Waterbury Travel, Training and Relocation Cost policy.

Relocation cost reimbursements will not be allowed for any federally funded programs.

The following general considerations apply whenever travel costs are being charged to a federal grant award:

- 1) The travel costs should appear in the project budget that was approved by the awarding agency. If this is not the case, the Municipal Manager should be contacted before initiating or signing off on travel expenses.
- 2) Costs involved in traveling to and from work, including parking while at work, cannot be claimed as travel costs.
- 3) The costs must clearly and directly benefit the particular project to which they are being charged.
- 4) For this reason, all travel costs must be properly documented in a manner that makes it possible for a third party to easily determine how the costs benefited the project.

- 5) The costs must be reasonable. Obtaining multiple price quotes for larger purchases, such as airline tickets, will help to ensure this.
- 6) The costs must be allowable for federal standards. For example, the cost of a first-class airline ticket is typically not allowable.
- 7) The costs must be consistent with Town policy.

The cost of attending a conference to gain a general understanding of the topics presented, rather than to receive or present specific information related to a sponsored award, may not be charged to a federal award.

Travel for Planning Meetings and other Non-Conference Purposes. Travel to attend meetings that do not qualify as “conferences” (see definition in Section 4) is sometimes necessary in order to manage complex, dispersed projects, to enable a team of two or more employees or elected officials to work together for limited periods of time, or for other such project-related purposes. Such travel may be charged to a federal grant award only if:


- 1) It is specifically included in the project budget approved by the funding agency.
- 2) The meeting involves those identified in the project application narrative and/or the project budget as working on the project. (The cost of traveling to meet with colleagues who are not formally identified as part of the grant project may not be charged to a federal grant award.)


Travel Costs for Project Consultants. The travel costs for a consultant who is serving a federal grant project may be charged to the grant if:


- 1) The cost of the consultant is specifically included in the project budget approved by the federal agency.
- 2) The consultant is under contract to carry out a scope of work for the federal grant project.
- 3) The travel is necessary to achieve the project goals and objectives. (In many cases, an out-of-town consultant can carry out his/her scope of work through virtual meetings.)

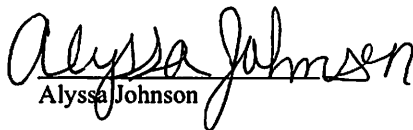
When contracting for a consultant’s services, the best approach is to include the necessary travel costs in the agreement and for the consultant to incur the costs and then request reimbursement for them when submitting his/her invoice(s) for services. The general federal standards discussed above, including reasonableness and allowability, apply to the consultant’s travel costs.


The foregoing Policy is hereby adopted by the Select Board of the Town of Waterbury this 19th day of December, 2022 and shall be effective January 1, 2023 until amended or repealed.


Michael Bard, Chair


Dani Kehlmann


Roger Clapp


Alyssa Johnson


Christopher Viens