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Rutherford County

To: Department Heads

From: Carl Classen, County Manager

Subject: Travel-Overnight Stays and Family Members

Date: October 23, 2012

Travelling is a necessary element of keeping informed so we provide the best services within the resources authorized. However, as seen in numerous recent media stories, travel for public purposes is subject to embarrassment when not truly in the public interest. To address these and other issues, the following clarifications to the Travel Policy are effective immediately.

Overnight Stays: As defined in the existing Travel Policy, traveling away from home means that an employee must be traveling away from the general tax home area substantially longer than an ordinary day's work and the employee needs to obtain substantial sleep or rest to meet the demands of the work while away from home. Generally, your tax home is the entire city or general area where your main place of business or work is located, regardless of where you maintain your family home.

Recently, there have been several requests for overnight travel that have been submitted for regional conferences in locations such as Morganton, Hickory, Charlotte and Asheville. If the conference is located within one hour of the County (see attached map), overnight stays should not be requested. Since you can leave from your duty station and be there in about an hour's commute, employees should commute for classes especially if there are sessions that do not require your attendance after the normal workday. This helps to save on County funds as it is less expensive to pay for the fuel for the commute than for the hotel stay. Also, who wants to be in a hotel rather than at home with family?

NOTE: It is the employee's responsibility to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Employees will be responsible for any additional costs and any additional expenses incurred for personal convenience or preference.

Family Members: In July, the travel policy was revised so that County employees may request that immediate family members (as defined by Rutherford County Personnel Policy) may accompany them in County-owned vehicles, if space is available. **Requests must be made in writing to the employee's supervisor, or County Manager if applicable, prior to the trip and must be submitted for each trip. No multi-trip approvals are allowed.** Copies of the department head's written approval should be attached to your travel request when submitted to Finance. Written authorization (prior to travel) should

be requested for all overnight stays, including those paid via a County credit card rather than a travel advance. Similar to traveling with a family member, family members may lodge with the employee when staying overnight, if the County incurs no additional charge due to the family member. If any additional charges are incurred, it is the employee's responsibility to pay those charges.

Reminder: Copies of registration information (agenda) should be included with registration/travel requests and the time of departure/arrival should be included on reimbursement requests and travel advance forms when returned to Finance. The Travel Policy is on the Finance Department's webpage. Please make sure you and your employees review it prior to traveling.

If you have any questions, please contact Paula Roach or me.

CC/dec

