

Chatham County Travel Policy

Updated January 2025

1. Overview of Travel Policy

This Policy is divided into the following three Sections:

- Section I: County Driving Privilege
Includes policies and requirements related to an employee's ability to drive a vehicle for County business.
- Section II: Operating a County Vehicle
Includes policies, procedures, and responsibilities for operating a county-owned vehicle.
- Section III: Traveling on County Business
Includes policies and procedures related to all travel for county business, including authorization, expenses and payment or reimbursement.

2. Penalty

Failure to comply with any of these policies, procedures, requirements, or responsibilities will result in disciplinary action, such as loss of the driving privilege and/or motor pool privileges, and up to and including dismissal. Any employee who does not have motor pool privileges is not eligible to receive mileage reimbursement.

Section I County Driving Privilege

Policies and requirements related to an employee's ability to drive a vehicle for County business.

1. Overview

An employee who drives a vehicle, whether County-owned or personal, to perform County business has been given certain privileges. The employee assumes the duty of obeying all motor vehicle laws, always maintaining the vehicle properly and, otherwise, following the policies and procedures outlined in this Section.

2. Driver Licensing and Insurance Requirements

County employee drivers and anyone authorized to drive a vehicle for County business must have a valid North Carolina driver's license for the class of vehicle being operated and must be able to drive a vehicle.

Employees who use their personal vehicles for county business are required to carry adequate limits of liability, with a suggested minimum of \$100,000 for property damage and \$300,000 for bodily injury. A copy of the declaration page of your personal automobile insurance policy must be provided to Chatham County annually by January 31st.

3. Driver Qualifications

Driver qualifications are as follows:

- A. Must be an authorized agent of Chatham County.
- B. Must meet licensing requirements.
- C. Interns are allowed to drive County vehicles if they meet the requirements of this Section and are issued a County ID badge.

4. Conditions for Disqualification

Any County employee who has had any of the following experiences during the last 36 months will not qualify to drive a County vehicle or to drive a personal vehicle on County business:

- A. Convicted of a driving-while-impaired offense.
- B. Conviction resulting in having driver's license suspended or revoked.
- C. Convicted failure to stop or report an accident.
- D. Convicted of reckless driving.
- E. Convicted of making a false accident report.
- F. Convicted of homicide, manslaughter or assault arising from the use of a vehicle.
- G. Convicted of driving while license is suspended or revoked.
- H. Convicted of attempting to elude a police officer.

Any County employee who has had any of the following experiences during the last 36 months will not qualify to drive a County vehicle or to drive a personal vehicle on County business:

- A. Convicted of more than three speeding violations.
- B. Convicted of more than two serious violations, as classified by state law.
- C. Convicted of two or more accidents, if the accidents are deemed "preventable" by the County's Accident Review Board and the accidents resulted in property damage exceeding \$1,000 or personal injury. Employees convicted of an accident while not on duty can request that the Accident Review Board review their situation and make a determination of preventable or not preventable. All accidents involving a County vehicle or a personal vehicle while an employee is on duty shall be reviewed by the Accident Review Board.

5. Review of Motor Vehicle Record

North Carolina Motor Vehicle Records (MVRs) will be used as the source for verifying driver history.

The County will review the MVRs of job candidates who are required to operate motor vehicles prior to employment offers. Job candidates who are required to operate motor vehicles and who do not meet the requirements of this Policy shall not be offered employment.

The County will review the MVRs of all employees and agents at least annually. Employees or agents who do not meet the requirements of this Policy shall not be able to operate County vehicles or drive their personal vehicles while on duty. Employees who are not able to perform their essential job duties as a result of having their driving privileges revoked will be subject to disciplinary action, including dismissal.

Section II

Operating a County Vehicle

Policies, procedures, and responsibilities for operating a county-owned vehicle.

1. Purpose and Composition of the County Vehicle Fleet

County vehicles are provided to support business activities and are to be used only by qualified and authorized employees or agents. They are not to be considered a part of an employee's compensation. In all cases, these vehicles are to be operated in strict compliance with motor vehicle laws of the jurisdiction in which they are driven and with the utmost regard for their care and cost-efficient use.

- A. Assigned fleet vehicles. These vehicles are assigned to specific departments or employees for routine use.
- B. Motor Pool vehicles. These vehicles are available to any employee authorized to drive for County business and can be reserved for specific trips through the Fleet Management System.

2. Driver Responsibilities

Each driver is responsible for the actual possession, care, and use of the County vehicle in their possession, whether that vehicle is assigned to the employee or department or if it is a motor pool vehicle that is checked out by the employee. The driver's responsibilities include, but are not limited to, the following:

- A. Operating the vehicle in a manner consistent with reasonable practices that avoid abuse, theft, neglect, or disrespect of the equipment.
- B. Obeying all traffic laws; that includes NO texting, as per state law.
- C. Using seat belts and shoulder harnesses (mandatory for driver and passengers).
- D. Only using cell phones with a hands-free device (except for emergency personnel).
- E. Adhering to the manufacturer's recommendations regarding service, maintenance, and inspection. Vehicles should not be operated with any defect that would prevent safe operation.
- F. Fueling the vehicle with regular grade fuel, not premium grade.
- G. Practicing safe driving techniques and adhering to current safety requirements.
- H. Restricting the use of vehicles to authorized drivers only.
- I. Accurate, comprehensive and timely reporting of all accidents or thefts of a County vehicle to the appropriate police agency, your supervisor, and the Safety and Risk Manager.

3. Prohibited Activities

The following activities are prohibited in County-owned vehicles:

- A. Driving while under the influence of alcohol or any controlled substance, including prescription

drugs that indicate impairment while operating equipment or machinery.

- B. Possession, transportation or consumption of alcohol or illegal drugs by anyone in the vehicle.
- C. Use of tobacco products.
- D. Texting or using a cell phone without a hands-free device (for the driver).
- E. Transporting pets, except when contained in a suitable pet carrier.
- F. Altering the interior or exterior of the vehicle in any way that is permanent or semi-permanent, including the application of stickers.

4. Personal Use

County vehicles are provided primarily for business purposes; however, incidental personal use is permitted. Personal use is a privilege extended only to the authorized employee. The privilege of personal use may be withdrawn at any time without notice by the County. The following rules apply to personal use of County vehicles:

- A. Only the authorized employee may drive.
- B. The County vehicle may only be used for incidental trips during the time in which the vehicle is assigned for authorized use, when in route and no significant mileage is added. This may include transporting children to and from school and childcare. If children are transported, the use of appropriate child safety seats is required.
- C. Employees who use a motor pool vehicle for overnight travel (like a conference) may use the vehicle for personal uses such as eating and pursuing legal and ethical leisure activities that do not add significant mileage. Employees may transport employees of other jurisdictions on such occasions.
- D. Personal trailers, including boat and recreational vehicles, are not to be pulled, except when authorized by the department head.
- E. The County vehicle may not be used to transport family or friends to out-of-town conferences.
- F. Employees should keep in mind appearances and use good judgment when using County vehicles.

5. Traffic Violations, Accidents and Thefts

- A. Fines for parking or moving violations are the personal responsibility of the assigned operator. Each driver is required to report all license revocations and all convictions for moving violations to their supervisor and the Safety and Risk Manager within two working days. Failure to report violations will result in appropriate disciplinary action, up to and including dismissal.
- B. In the event of an accident, employees and agents shall follow the County's Accident Reporting Procedure.
- C. In the event of the theft of a County vehicle, employees or agents shall notify local police

immediately.

6. Fuel Card Guidelines and Requirements

Before an employee can drive a County vehicle, the employee must obtain a fuel card PIN.

- A. Department Heads are responsible for requesting employee PIN numbers and notifying the Accounting Technician or Procurement Manager when they need to be canceled. PIN requests for new employees can be done while motor vehicle record checks are requested. New PIN requests are usually done the same day.
- B. PIN numbers are specific to each employee. Employees shall not share their PIN numbers.
- C. Fuel cards are assigned to the vehicle, not the employee. Therefore, anyone with a PIN number can purchase gas for any vehicle when the fuel card is in the glove box. Employees shall not remove fuel cards from the vehicles.
- D. When employees fuel the cars, key in the actual mileage. Do not make up a mileage number.
- E. Only use regular fuel. Do not use premium grade fuel.

7. Motor Pool Policy and Procedures

A. Vehicle Locations

- 1) Pittsboro: In the fenced lot behind the Performance Building.
- 2) Siler City Police Department.

B. Use of the Motor Pool

- 1) Priority Trips. In the event that all motor pool vehicles are reserved, priority will be given to certain types of trips. The last reservation made for the lowest priority trip will be “bumped” in favor of a higher priority trip. The following are trip types, listed from highest to lowest priority:
 - a) Carrying one or more passengers
 - b) High-mileage trips (more than 35 miles)
 - c) Trips with a set, non-flexible day, and time
 - d) All other trips
- 2) Unmarked vehicles will be available. Please request this from the special vehicle request section of the Fleet Management System.
- 3) Employees are responsible for motor pool vehicles during their usage.
- 4) There are a limited number of motor pool vehicles available. If an employee has reserved a vehicle for a period of time and the vehicle is not being used, it should be returned to the motor pool.
- 5) Gas should be obtained only from the County’s selected fuel vendor or joint bus garage. Employees should adhere to all fuel card procedures.
- 6) Vehicles must be refueled prior to their return. Only use regular grade fuel. Obtain a receipt for the fuel and attach it to the form when returning the motor pool vehicle.
- 7) All trash must be removed from vehicles prior to return. An employee who repeatedly

returns a vehicle in a trashy condition may have their motor pool privilege revoked and their department will pay the cost of cleaning the vehicle.

- 8) In some cases, an employee may need access to a motor pool vehicle before normal working hours. In that case, the employee should pick up the key at 5 p.m. on the day before and then obtain the vehicle on the day of the trip.
- 9) If an employee can begin and end the motor pool trip on the same day, the vehicle should be picked up and returned on the day of the trip.
- 10) If a vehicle is returned after hours, the key should be left in the key box.

C. Taking Motor Pool Vehicles Home

In some situations when a trip starts before or ends after normal working hours, it may be permissible for an employee to take a motor pool vehicle home. The following are situations in which an employee may take a vehicle home (either overnight or over a weekend):

- 1) When the employee's home is closer to the destination than the motor pool lot.
- 2) When the employee must travel more than 10 miles to pick up a vehicle and the motor pool lot is not on the way.

Anytime a vehicle is taken home, the employee should take extra care to ensure the security of the vehicle and its contents.

D. DSS On-Call Workers

The motor pool has one vehicle in Pittsboro and one vehicle in Siler City (to be kept at the Siler City Police Department) designated for on-call purposes by the Department of Social Services. The department will have copies of the keys to these vehicles. It is the responsibility of the on-call worker to keep the key for the week. On-call workers may not take a motor pool vehicle home.

In some situations, it may be permissible for the DSS on-call employee to receive full-rate mileage reimbursement for driving his/her personal vehicle:

- 1) If the employee's home or current location is closer to the destination than the motor pool lot.
- 2) If the employee must travel more than 10 miles to pick up a vehicle and the motor pool lot is not on the way.

Section III

Traveling on County Business

*Policies and procedures related to all travel for county business,
including authorization, expenses and payment or
reimbursement.*

1. Overview

When it is necessary or desirable for a county employee or official representative to travel to participate in a meeting, conference, workshop, or seminar, or to otherwise conduct the County's business, an employee shall follow the policies and procedures set out in this Section and the County will bear the necessary and reasonable expenses relating to these activities.

2. Purpose

The purpose of this Section is to establish a uniform procedure for the authorization and payment of certain travel, training and other business expenses to Chatham County departments, agencies, and employees. This Section also provides guidelines for the payment and reimbursement of such expenses. This Section applies to all employees, officials and board members of Chatham County who are traveling on official County business.

3. Definitions

The following definitions apply to this Section:

A. Routine Travel

Routine travel includes trips that are regularly scheduled or are otherwise a routine part of an employee's duties. These trips are almost always local in nature and do not require overnight stay. This does not include trips for reporting to an employee's workstation, nor does it include trips to the office for employees who normally work from home; these trips are not reimbursable.

B. Non-Routine Travel

Non-routine travel includes any trip that requires overnight stay and expenses such as registration, lodging, per diem meals, and transportation.

C. Workstation

The workstation is the job location at which the employee spends the majority of his or her working hours.

D. Full Day

A full day is defined as when your duties require you to be away from the general area of your workstation substantially longer than an ordinary day's work and you need to sleep or rest to meet the demands of your work while away from your workstation.

E. Conference Hotel

A conference hotel is a hotel specifically designated for lodging by the association that is hosting or coordinating the conference.

4. General Transportation and Mileage Policies

County employees are expected to use the most economical means of transportation available for each trip while considering time, distance, and cost.

A. Requirement to Use County Vehicles

- 1) An employee who is transporting a non-County passenger for County business must use a County vehicle for the trip. This is most applicable to the Department of Social Services. Non-County passengers do not include members of an employee's family.
- 2) Employees who are assigned a County vehicle must use that vehicle for County business,

unless the vehicle is being serviced and another vehicle is not available for use from the motor pool. This requirement may not apply for trips where air, rail or bus travel would be more economical.

- 3) Employees who are not assigned a county vehicle are encouraged to use a motor pool vehicle for County business unless a vehicle is not available or where circumstances would dictate otherwise.
- B. Use of Personal Vehicle and Mileage Reimbursement Guidelines
- If an employee uses his/her own personal vehicle, the County will reimburse the employee on the basis of mileage. The County mileage allowance is set each year as part of the budget and is based on IRS regulations in place at the time. Any employee who does not have motor pool privileges is not eligible to receive mileage reimbursement.
- 1) For trips where the roundtrip mileage is 35 miles or less, employees may use their own personal vehicle and be reimbursed at the full mileage reimbursement rate.
 - 2) For trips where the roundtrip mileage is greater than 35 miles, employees who use their own personal vehicle will be reimbursed as follows:
 - a) At the full mileage reimbursement rate if the employee attempted to reserve a motor pool vehicle and none was available, provided this cost does not exceed the cost of air travel. A print-out of the "no vehicle available" screen or email for the trip seeking reimbursement must be attached to the reimbursement request.
 - b) At the full mileage reimbursement rate if the employee had reserved a motor pool vehicle and was "bumped". A print-out of the email from the fleet coordinator to that effect must be attached to the reimbursement request.
 - c) For employees whose workstation is in Siler City, at the full mileage reimbursement rate for trips to pick up and drop off a motor pool vehicle located in Pittsboro, in the event that no motor pool vehicle is available in Siler City.
 - d) For employees traveling to an out-of-town conference who would like to transport family members with them, at one-fourth the mileage reimbursement rate.
 - e) At one-fourth of the mileage reimbursement rate in any other circumstance.
 - f) Mileage for meals will not be reimbursed.
 - 3) If a trip is not part of "reporting to work," employees will be reimbursed at the full mileage reimbursement rate for trips to obtain a motor pool vehicle.
- C. Other Transportation Expenses
- All other necessary transportation related fees will be advanced or reimbursed by the County.
- 1) Necessary parking fees will be advanced or reimbursed.
 - 2) Necessary toll charges will be reimbursed provided the toll was incurred on the most direct route.
 - 3) In cases where a rental car is used, the use of economy priced rental cars may be allowed when cost effective and if pre-approved on the Chatham County Request for Overnight Travel Form.
- D. Any parking or traffic citations received while on County business are the responsibility of the employee and must be reported to the employee's supervisor and the Safety and Risk Manager.
- E. Requirement for Insurance

maintain liability insurance in accordance with state law. Employees who are involved in an accident while on County business will be expected to produce proof of insurance.

5. Policies and Procedures for “Routine Travel”

- A. Preapproval is not required for Routine Travel.
- B. Purchase Orders are required for “Routine Travel” Costing \$50 or more.
- C. Reimbursement Procedures
 - 1) Complete a Request for Payment Form.
 - 2) Submit the completed Request for Payment Form, with receipts and/or registration forms attached to the Finance Department within 10 business days of event.

6. Policies and Procedures for “Non-Routine Travel”

- A. Preapproval Required

The County will only reimburse an employee/representative for expenses related to travel that have been approved **in advance** by the Department Head and/or the County Manager’s office on a Chatham County Request for Overnight Travel Form. All information in this procedure assumes that preapproval has been obtained.
- B. Unexpected Costs

It is understood that the estimated costs on the pre-approved Chatham County Request for Overnight Travel Form may not be fully complete and that additional appropriate and allowable expenses may be incurred that were not pre-planned. It is the intent of the County to fully reimburse an employee for appropriate and allowable expenses as described in this procedure if the travel and its purpose have been pre-approved on a Chatham County Request for Overnight Travel Form.
- C. Allowable Costs
 - 1) Registration

The County will pay all registration costs for an approved meeting, conference, workshop, or seminar.
 - 2) Lodging

In order to qualify for reimbursement, the travel destination must be greater than 50 miles from the employee’s normal workstation. The County will pay the actual cost of lodging, provided the employee seeks reasonably priced lodging. Exceptions may be made by the department head or county manager for designated conference hotels. Room and tax charges only will be reimbursed, as well as business-related internet charges. Tips for room service, other hotel services, and additional personal expenses are not reimbursable. Employees or officials sharing a room with a non-County individual (including family members) are responsible for reporting and requesting reimbursement of lodging expenses at single occupancy rates.
 - 3) Meals
 - a) Due to IRS regulations, meal expenses related to day training or travel activities, where there is no overnight stay, will NOT be reimbursed by the County.
 - b) The per diem meal allowance for overnight travel is based on the current adopted budget ordinance.
 - c) Meals that are included in an event’s registration costs cannot be claimed as a per diem expense. The County will only allow exceptions related to medical dietary

restrictions, approved in advance. If an employee opts to skip an event meal that is included and purchase that meal elsewhere, the County will not cover this expense.

- d) Meals that are not part of the event's registration costs but are an additional cost and are part of the event, will be covered in full by the County. The County will pay for such meal, even if the event is within 50 miles and does not require an overnight stay. For example, a luncheon that is part of a conference and has guest speakers but costs an additional amount outside of the registration fee (whether it does or does not exceed the per diem amount) will be paid for by the County.

4) Transportation

The County will pay for transportation costs in accordance with the General Transportation and Mileage Policies of this Section.

D. Exclusions

The County will not pay for personal expenses and entertainment that are unrelated to the purpose of the travel or other expenses that are not outlined as allowed in this procedure. Examples of expenses that will not be covered by the County include, but are not limited to, the following:

- 1) Alcoholic beverages.
- 2) Personal expenses such as magazines, movies, premium TV channels and other entertainment.
- 3) Personal internet use.
- 4) Meals when no overnight stay is required (see exception in C. 3) d) above).
- 5) Meal amounts over per diem.
- 6) Non-routine travel not approved in advance.

E. Procedure

1) Preapproval Process

A Chatham County Request for Overnight Travel Form with all estimated travel costs must be pre-approved by the department head (or designee). The Chatham County Request for Overnight Travel Form must include all known or estimated expenses including, but not limited to:

- a) Registration cost (conferences or training and agenda)
- b) Per diem meals
- c) Lodging
- d) Transportation (airfare, mileage with printed map details from workstation to destination showing miles, rental cars).
- e) Other required expenses (shuttle/taxi service, parking, etc.)

The Chatham County Request for Overnight Travel Form must be approved in advance by the Department Head (or designee). For all out-of-state travel, an additional approval is required from the County Manager (or designee) in advance.

2) Registration Payment

Registrations may be prepaid using a p-card or check. For p-card transactions, refer to the P-card Policy and remember to save all receipts. If a P-card is not used, the Chatham County Request for Overnight Travel Form or Request for Payment Form and copies of registration forms and agenda must be received by Accounts Payable no less than 21 days

prior to any registration deadlines. Accounts Payable will mail all registration forms with the check.

Registration fees paid out-of-pocket by the employee will be reimbursed upon completion of the Request for Payment Form but must be submitted to Finance within 30 days of the event.

3) Per Diem Meal Advances

Complete the Chatham County Request for Overnight Travel Form and submit to Accounts Payable at least 21 days prior to departure. If the Overnight Travel Form is not submitted in advance no payment will be processed, nor will the meals be reimbursed to the employee. Should the travel event not occur, all money advanced to an employee must be returned to the Finance Department within 10 days after the travel event is cancelled.

4) Request for Payment Form Completion (after travel)

After the travel is complete and the employee has returned, all additional reimbursable related expenses must be reported within 10 business days to Accounts Payable by submitting a Request for Payment Form. Receipts or other documents will be required for all expenses as noted in this procedure (see section 5 below). Additional documentation may be requested from the employee prior to final processing of any reimbursement.

5) Receipts

Receipts are required for ALL expenses, except for per diem meals. Electronic receipts or copies of online transactions that include the total cost and item description are allowable for any on-line transactions. Duplicate receipts are generally available from vendors and hotels upon request.

6) Payment Methods

The County has two methods for paying travel expenses:

- a) P-cards may be used to pay for most travel and training expenses; however, they may NOT be used for any employee travel-related meals, except in emergency situations. For other p-card charges, the total amount charged to the p-card prior to or during the travel must be indicated on the Chatham County Request for Overnight Travel Form.
- b) Travel advance requests (which will include, but not limited to registration forms/agenda, lodging details, mileage map details, etc.) must be submitted in advance to Accounts Payable at least 21 days prior to any payment deadlines or departure. Under no circumstances will the advance exceed estimated travel expenses, excluding prepayments.

F. Authorities

As stated above, the Department Head (or designee) shall approve Chatham County Request for Overnight Travel Forms in advance and Request for Payment Forms after the travel event where additional reimbursement is required. In addition to obtaining Department Head (or designee) approval in advance, all Chatham County Request for Overnight Travel Forms related to out-of-state travel must be pre-approved by the County Manager (or designee). The Department Head is responsible for monitoring all expenses and question any unreasonable charges incurred.

The Finance Department will review all Chatham County Request for Overnight Travel Forms and will advise the employee and possibly the Department Head or Finance Officer of any apparent deviations from these procedures.

The County Manager shall rule on any differences of opinion in the interpretation of the terms of this procedure that cannot be resolved to the mutual satisfaction of the Department Head and the Finance Department.