TOWN OF DAVIE
HUMAN RESOURCES DEPARTMENT

TRAVEL POLICY
SOP #21-016

July 17, 2015

SUMMARY OF REVISED, DELETED, OR ADDED MATERIAL

This operating procedure shall replace the Personnel Rules and Regulations and Policies enacted prior to the effective date of this Operating Procedure.

Revision	Date	Responsible Department	Description of Change
1	May 18, 2011	Human Resources	Initial Release
2	September 19, 2012	Human Resources	Revision
3	July 17, 2015	Human Resources	Revision

APPROVALS:

Author — Date 7/31/15

Town Administrator — Date 8-3-15

1-1. POLICY.

It is the policy of the Town of Davie to pay for all reasonable and necessary expenses associated with travel and transportation resulting from an employee's, elected officials, or other Town Administrator authorized person's attendance at any meeting, seminar, conference or convention which has been properly approved as having a demonstrated benefit to the Town.

1-2. SCOPE.

This operating procedure applies to all employees of the Town of Davie (Town) in the Regular Service (regardless of probationary or other status), as well as all Executive, Part-Time, Seasonal employees, and volunteers.

1-3. PROCEDURE.

a. Types of Authorized Travel

1. Class A Travel - Continuous travel of twenty-four (24) hours or more away from official headquarters (Note: Official headquarters shall be defined as the city or town that the public officer or employee is assigned). The travel day for Class A travel shall be a calendar day (midnight to midnight). Class A travel shall include any assignments on official business outside of the regular office hours and away from regular places of employment when it is considered reasonable and necessary to stay overnight and for which travel expenses are approved (FS 112.061 (5) (a)) as provided within this policy.

2. Class B Travel - Continuous travel of less than twenty-four (24) hours which involves overnight absences from official headquarters. The travel day for Class B travel shall begin at the same time as the travel period. Class B travel shall include any assignments on official business outside of the regular office hours and away from regular places of employment when it is considered reasonable and necessary to stay overnight and for which travel expenses are approved (FS 112.061 (5) (a)) as provided within this policy.

3. Class C Travel - Travel for short or day trips where the traveler is not away from the official headquarters overnight. Class C travel can receive subsistence as provided in this policy. Class C travel will receive allowance for meals as provided in Section C, 4, iii. of this policy found.

b. Travel Authorization

1. Travel will be authorized for official Town of Davie business purposes only.

2. All travel subject to reimbursement must be approved **in advance** by the Department Director of the department to which the travel is to be charged and the Town Administrator or designee; this will include Class A, Class B and Class C Travel.

3. Authorization for Class A and B travel for Department Directors should be approved by the Town Administrator or designee in advance.

4. Travel out of the State of Florida, for all employees, must be approved by the Town Administrator. Request for out of State travel should be made by the employee's Department Director directly to the Town Administrator, at least two (2) weeks prior to travel. Request should be made on the "Town of Davie Request for Travel and Final Cost of Travel Form." The request must include name of employee(s) to travel, purpose of travel, period of travel, cost of travel, and necessity of travel.

5. Class A and Class B travel overnight within the State of Florida will not normally be authorized for locations less than sixty (60) miles (based on State of Florida Official Highway Mileage map) from official headquarters. Under special circumstances, e.g. events/activities after 5 p.m., required preparation work after 5 p.m., when through normal travel employees cannot return to official headquarters by 7:00 p.m. etc., Department Directors may request authorization through the Town Administrator or designee. Request must be made by the Department Director directly to the Town Administrator or designee, in writing in advance. Request should be made on the "Town of Davie Request for Travel and Final Cost of Travel Form" found in Appendix A of this policy. The request must include the name of employee(s) to travel, purpose of the travel, period of travel, costs of travel, and necessity of travel, and need to stay overnight.

c. Reimbursement of Travel Expenses

1. Reimbursement of travel expenses will be made in accordance with the Town of Davie Budget and Finance Accounts Payable Policies, Town of Davie Policies, Florida Statutes, Chapter 112.061 and Internal Revenue Code of the United States of America. Travel expenses of travelers will be limited to those expenses necessarily incurred by them in the performance of a public purpose authorized by law. Reimbursement of travel expenses must be requested on the "Town of Davie Request for Travel and Final Cost of Travel Form" (Appendix A).

2. Seminars and Conferences

   (i) Seminars and conferences may be authorized by the Department Director of the employee(s) to attend. Seminars and conferences to be attended will be directly related to the training and development of an employee's current position.

   (ii) Expenditures for seminar and conference registration fees may be made by the individual's Town of Davie purchasing card or may be requested through the

Finance Office in advance, after proper authorization. Payment of required expenses will be made directly to the vendor. Costs for the registration will be paid by the Town of Davie at 100%.

(iii) The Town of Davie recognizes that there are times when seminar and conference fees cannot be paid in advance. When fees are paid at registration by the employee, expenditures can be reimbursed through the Budget and Finance Department, with proper approval. An explanation of why fees could not be or were not paid in advance must accompany the request for reimbursement to the Budget and Finance Department.

3. Hotel/Motel Accommodations/Lodging

(i) Expenditures for accommodations/lodging may be made by the individual's Town purchasing card or may be requested through the Budget and Finance Department in advance, after proper authorization. Payment of required expenses will be made directly to the vendor.

(ii) Accommodations/lodging will be paid for actual expenses at a single occupancy rate to be substantiated by paid bills. The actual receipt or bill will be filed with the Budget and Finance Department. The difference in the rate for double occupancy or an up-grade can be paid by the employee.

(iii) When seminars or conferences provide a variety of hotels or motels that can be used, employees should choose the most economical for reservations. Any deviation will require prior approval by the Town Administrator, with reasonable explanation. The difference in the rate for more elaborate accommodations or lodging can be paid by the employee.

(iv) The Town is exempt from taxes and the employee should therefore request a copy of the Town's tax exempt certificate from the Finance Department before departure. Taxes which are charged to the employee because he/she does not present a copy of the Town's tax exempt certificate will not be reimbursed.

Exception: When an employee travels outside the state of Florida, taxes charged will be reimbursable.

4. Meals

(i) Meals and tips for other than local travel are limited to a per diem payment equivalent to the prevailing per diem established by the Internal Revenue Code Continental U.S. rate for meals and incidental expenses reduced proportionately for partial days or meals provided through registration or

airfare. Such payment is inclusive of all meals, drinks, and tips, tips to hotel staff and any other miscellaneous daily expenses.

(ii) Per diem will be reduced by one-third each if the employee begins travel status after 9:00 a.m. and/or ends travel before 6:00 p.m. Additionally, all meals otherwise provided for, inclusive of continental breakfasts, will reduce per diem payments by one-third.

(iii) No allowance will be made for meals when travel is confined to the Town of Davie, the official headquarters or immediate vicinity (60 mile radius from Town Hall, 6591 Orange Dr. Davie, FL 33314); except assignments of official business outside the traveler's regular place of employment if travel expenses are approved (FS 112.061 (5)(b)).

(iv) No one, whether traveling out of State or in State, will be reimbursed for any meal that is included or provided in a convention, conference or seminar registration fees paid by the Town of Davie or any other agency or organization.

(v) No one, whether traveling out of the State or in State, will be reimbursed for any meal that is included or provided in fees or expenses for transportation paid by the Town of Davie or any other agency or organization, e.g. airline meals, meals on trains.

(vi) An individual's Town purchasing card may not be used to purchase meals.

5. Transportation

(i) All travel must be by a usually traveled route. When a person travels by an indirect route for their own convenience, any extra costs will be borne by the traveler; and reimbursement for expenses will be based only on the charges that would be incurred by a usually traveled route (FS 112.061 (7) (a)).

(ii) When planning travel, the Department Director should designate the most economical method of travel. The following considerations should be given for all trips or travel:

(a) The nature of the official business.

(b) The most efficient and economical means of travel (considering time of the traveler, cost of the transportation, and per diem or subsistence required).

(c) The number of persons making the trip and the amount of equipment or material to be transported.

(iii) Commercial vehicle or carrier for travel will be made or approved in advance and payment made directly to vendor. Commercial vehicle or carrier is restricted to exclude the cost of first class fare.

(iv) When traveling by vehicle, publicly owned vehicles should be used in lieu of the use of a privately owned vehicle, whenever possible. When travel is authorized by a privately owned vehicle, the employee (driver of private vehicle) will be entitled to a mileage allowance which will be made at the amounts and limits set by the Internal Revenue Code of the United States of America. All expenses (including repairs, maintenance, etc.) pertaining to the usage of a privately owned vehicle are included in the mileage reimbursement rate.

(v) Vehicles may be rented for remote or emergency travel, subject to the following:

(a) The location of the meeting, seminar, conference, or convention is different than that of the lodging accommodations, or
(b) The rental of the automobile is less expensive than other forms of transportation to or from the lodging or meeting.

(vi) Mileage will be reimbursable from the official headquarters to the point of destination unless point of origin is closer. Travel within the State of Florida will be based on the State of Florida Official Highway Mileage map (http://www.dot.state.fl.us/planning/statistics/hwydata/intercity.shtm). Travel outside the State of Florida mileage figures should be obtained through the Budget and Finance Department. Vicinity mileage is allowable if it is official business. Proper mileage should be verified that the appropriate map mileage has been used prior to approval of reimbursement.

Whenever possible, car pooling should be utilized to minimize the cost of travel to the Town of Davie. When more than one Town of Davie employee is traveling to a conference, meeting, or any official business directly related to the employee's job performance, transportation should be shared and cost minimized.

6. Parking and Tolls

Payments will be allowed for parking and tolls provided that the costs are documented and reasonable. Parking at departing airports will be reimbursed only to the cost of taxi fare from the Davie Town Hall to the Airport and back to Davie Town Hall. Transfers from airport to hotel may be advanced if documented. If not, reimbursement shall be requested upon return with verified receipt.

7. Insurance

No insurance will be allowed as a reimbursable travel or transportation expense.

8. Other Expenses

   (i) Incidental travel expenses may be reimbursed, with proper receipts and documentation. These include, but are not limited to

      (a) Taxi fare;
      (b) Ferry fares; and bridge, road, and tunnel tolls;
      (c) Storage or parking fees;
      (d) Official Town of Davie business communication, e.g. telephone or fax expenses;
      (e) Convention/conference fees for attending events that are not included in the basic registration fee that directly enhance the public purpose and official Town of Davie business of the attendee (e.g. additional educational classes/sessions, conference meals.) It will be the responsibility of the attendee to substantiate that the charges were proper and necessary.
      (f) The Town will reimburse fees for one (1) checked bag only for Town business travel occurring for a week or less. For Town business travel occurring for more than seven (7) days, the Town will reimburse fees for two (2) checked bags. The Town will reimburse the cost of bags needed to transport official Town business materials, for example, exhibitor materials. Reimbursement for the bag(s) is limited to the airline's standard checked baggage fee and the Town will not pay additional fees for oversize or overweight bags except if assessed on any of the actual Town owned materials (like the exhibitor materials example).

   (ii) Expenses that are not reimbursable include, but are not limited to:

      (a) Tips, Bell Boy assistance.
      (b) Movie rentals in hotel/motel rooms.
      (c) Hotel/motel safes.
      (d) Parking tickets or traffic fines.
      (e) Communication/telephone charges that are not official Town of Davie business.

d. Compensable Travel Time - Travel time will be considered as compensable hours worked for non-exempt employees as outlined in the Hours and Compensation policy.

Appendix A

REQUEST FOR TRAVEL AND FINAL COST OF TRAVEL

Department _____ Employee Name _____

Travel Destination (City and State) _____

Begin Travel _____ End Time _____
Time Date Time Date

Describe below the nature of the meeting, seminar, conference or convention and justification for attending
(attach any brochure or printed media): _____

PLEASE ATTACH ALL TRAVEL DOCUMENTATION AND RECEIPTS (EXCEPT MEALS)

Calculation of Costs:	Procurement Card	Payee Name	Advance Request	Final Cost
Registration Fees : # of meals included: Early Registration Date for Discount	☐ Yes ☐ No		$0.00	$0.00
Transportation: Auto Rental ☐ Airfare ☐	☐ Yes ☐ No		$0.00	$0.00
Personal Auto ☐ Town Auto ☐				REIMBURSED ON FINAL COST OF TRAVEL. SEE BELOW.
Per Diem: # of meals x $ per day			$0.00	$0.00
Lodging: # days x $ per day	☐ Yes ☐ No		$0.00	$0.00
Subtotal of Expenses:			$0.00	$0.00
Total Paid by Suntrust Card			$0.00	$0.00
Total Paid by Checks		**Account #** _____	$0.00	$0.00
Total Reimbursable Expense:			**$0.00**	**$0.00**

Other Charges Incurred During Travel:

1. Tolls		Attach Toll Receipt	$0.00
2. Parking		Attach Parking Receipt	$0.00
3. Taxi or Limousine Service		Attach Receipt	$0.00
4. Personal Auto (mileage	x $.50 per day)	Attach Mileage Information	$0.00
5. Town Auto (Fuel Only)		Attach Receipt	$0.00

Grand Total Reimbursable Expense: **$0.00**

**** Please Indicate Organization Name receiving payment if paid by procurement card. When requesting a check, state payee name and vendor number (verify address attached to vendor # is correct)***

		Advance Request	Final Cost
Employee's Signature	_____	Date _____	Date _____
Department Director	_____	Date _____	Date _____
Purchasing	_____	Date _____	Date _____
Town Administrator	_____	Date _____	Date _____

Finance Approval (checks payable to Employee Sent to Dept) _____ Date _____