

TOWN OF BELLEAIR ADMINISTRATIVE POLICIES AND PROCEDURES MANUAL	
POLICY: Travel & Training Expense Policy	POLICY NUMBER:
ORIGINATING DEPARTMENT: Administration (JP Murphy)	
EFFECTIVE DATE:	APPROVED BY:
SUPERSEDES POLICY: Travel and Per Diem	LAST REVISED:

SCOPE

The Travel & Training Expense policy applies to any and all travel and training expenses for employees of the Town of Belleair. This policy is not applicable to tuition reimbursement or regular, recurring mileage reimbursements as determined by town manager.

OBJECTIVES

1. To provide a process for submittal and approval or travel/training requests.
2. To provide guidelines for employees engaging in travel/training to follow.
3. To demonstrate the value of the training provided.
4. To ensure proper accounting and reimbursement of travel expenses.
5. To ensure the most efficient and economical means of travel, considering the time of the traveler, cost of transportation and per diem or subsistence required.
6. To collect information necessary to develop a training plan.

POLICY GUIDELINES

Application Timeline

1. Department director submits training/travel request to town manager at least *three weeks prior* to registration for any travel related expenditure. This includes personal pre-travel checks for mileage reimbursement, meals and incidental expenses.
2. Approval from the town manager must be in electronic form as provided by Support Services and will be transmitted to the requesting director and accounts payable.
3. After approval the department director may then make expenditures related to the travel and registration for approved training under the guidelines of this policy. These purchases will then be forwarded on to the town manager or his designee to be processed through the town’s finance system. This includes purchases made both before and during the travel/training event.
4. Expenditure requests that require the town to prepare a check to be used during travel must be approved by town manager a minimum of *two weeks prior* to the date of travel, including travel advance provided to an employee.

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Transportation, Lodging, and Other Business Expenses

1. For travel that does not require flight, employees make an effort to use a town vehicle assigned to their department. If no vehicle is available, department director should request the use of another department’s assigned vehicle. If there is still no vehicle available, at the sole discretion of the town manager, employees may use their personal vehicle.
2. Whenever travel by privately owned vehicle is authorized, the traveler shall be entitled to a mileage allowance at a fixed rate not to exceed the standard mileage rate currently permitted by the Internal Revenue Service. Except for the mileage allowance, tolls and parking fees, reimbursement for expenditures related to the operating maintenance and ownership of the vehicle shall not be allowed when privately owned vehicles are used on public business. All mileage shall be shown from point of origin to point of destination, based on travel route. Point of origin will be defined as home unless otherwise approved.
3. If traveling by air, transfer between destination airport and training site must be done in the most reasonably economic way possible. Preference should be given to the use of public transportation or commuter services (such as shuttle, bus, etc.).
4. Travel to and from an airport is considered a town expense. The town will pay for one vehicle to be parked at the Tampa International Airport’s economy lot, or the most affordable secure parking option based on the length of travel. If multiple employees are traveling to the same training session, the group leader will be responsible for coordinating the pickup/drop off of all employees traveling.
5. The renting of vehicles while on travel & training assignments, either in-state or out-of-state must be included in the pre-travel expenditure approval. Employees driving such vehicles will be held to the same standards that they are held to by the town’s vehicle use policy. Transportation expenses such as taxi fare, ferry fares, tolls, parking fees, etc. will be considered town expenses, provided that they are directly related to the purpose of the approved travel. Transportation for leisure and entertainment will not be paid or reimbursed by the town.
6. Lodging costs must be reasonable, with consideration of convenience and quality. Group lodging options should be considered in addition to hotels. Whenever possible government rates must be selected. Pre-negotiated rates for hotel rooms related to conferences, such as block rates, will be given preference. Transportation cost impacts must also be considered between the lodging and conference location.
7. Other business expenses will be the responsibility of town, including but not limited to: communication expense (including up to \$2.50 per day for personal phone calls when on official travel overnight), gratuities not in excess of 20% of the service value (with the

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exception of gratuities for meals which are included in the M&IE reimbursement), and wireless internet charges of up to \$20 per day to be used in transit, at the lodging location, or at the official conference or training location. Employees are encouraged to use a town air card if one is available.

8. Employees who are issued a Purchasing Card (P-Card) are required to use either their personal or departmental card for travel-related expenses other than Meals & Incidental Expenses (M&IE) (i.e. lodging, transportation and other business expenses). Employees who are not personally issued a P-Card should use their departmental P-Card for such non-M&IE travel-related expenses. All expenses not included in the Meals & Incidental Expenses (M&IE) allowance should be paid using the P-Card. Employees should be mindful of their personal or departmental credit limit at all times. All receipts must be retained and kept in their original condition to be submitted after the employee returns.

Meals & Incidental Expenses

1. Employees may only incur expenses up to the allowed amounts for Meals & Incidental Expenses for the travel locality as published by the U.S. General Services Administration. Employees may not aggregate the amounts for meals to spend more on a single meal. If one or multiple meals are included in the registration cost for a conference or seminar, and the meal(s) does not conflict with the dietary restrictions of the employee, the town expects the employee to eat that meal and therefore will not pay for any alternate meal choices.
2. All travelers may be allowed subsistence while on authorized travel outside of town, but not requiring absence from the town overnight, in amounts permitted for meals, as specified in the GSA breakdown of the M&IE.
3. When authorized travel includes one or more partial days the traveler will be given a partial day allowance based on the hours of travel. Each meal will only be eligible for allowance if it meets the following criteria: Breakfast will be eligible when travel begins before 10:00 A.M.; Lunch will be eligible when travel occurs anytime between 11:00 A.M. and 2:00 P.M.; Dinner will be eligible when travel occurs anytime between 5:00 P.M. and 8:00 P.M.
4. The incidental expense allowance shall be five dollars per day of training/travel on full and partial days.
5. Employees are encouraged to pay for meals using the travel advance, however they have the option to use a P-Card to pay for their meals provided that receipts are retained and submitted to Accounts Payable upon return. No employee may take a travel advance for meals *and* use a P-Card to pay for meals during the same trip.

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Required Materials

1. When making travel/training requests, the department director must provide a pamphlet, brochure, or synopsis of the training in addition to a detailed schedule or agenda. If some or all of this information is unavailable at the time of the request it may be submitted once it becomes available, provided that it is submitted no later than *three weeks prior* to travel. The Travel & Training Expense Request will include a cost estimate at the time of submission to the town manager.
2. Upon return to work following travel employees must submit all receipts for expenditures made during travel to town manager, no later than *five days following* their return. Any travel costs that were not included in the original Travel & Training Expense Request must be included in a new Travel & Training Expense Request and submitted *immediately* following travel to the department director for approval. Only those costs *not* previously included in the original request should be listed. If the secondary request is approved by the director it will be submitted to the town manager for approval. Personal reimbursement for secondary requests will only be granted in cases where the requester could not reasonably have anticipated the expense and did not have access to a P-Card during travel/training.
3. Employees are encouraged to write a synopsis of their experience at the provided training upon their return. Synopsis should include information about the session(s) attended, what the employee learned, and how the training was helpful to them and why. If training was not helpful to employee, employee should express why the training was not helpful. Employees will be given time by their supervisor on their *first day returning* from travel, to complete synopsis. In addition, a travel cover sheet will be provided for the purposes of classifying and tracking travel.
4. All certifications earned must be provided to the human resources technician for record-keeping purposes.

APPROVAL

1. Upon submission department directors will review the Travel & Training Expense Requests of their employees.
2. Final approval of all travel and training shall be by the town manager or his/her designee.
3. After approval or denial of a request, directors will be notified of the town manager’s decision and requesters will be notified that they can speak with their director regarding the result of their request.