

Memorandum

To: **All DOEA Managers and Employees**

From: **E. Douglas Beach, Ph.D., Secretary**

Date: **May 28, 2009**

Re: **Mission-Critical Travel**

Senate Bill 2602 was signed by Governor Crist on May 27, 2009 and is effective beginning July 1, 2009. Section 58 of this legislation imposes the following **restrictions on expenditures of state revenues** for travel by State officers and employees:

It is the policy of the state that funds appropriated to each state agency which may be used for travel by state employees be limited during the 2009-2010 fiscal year to travel for activities that are critical to the state agency's mission. Funds may not be used to pay for travel by state employees to foreign countries, other states, conferences, staff-training activities, or other administrative functions unless the agency head has approved in writing that such activities are critical to the agency's mission. Travel for law enforcement purposes, military purposes, emergency management activities, and public health activities is not covered by this section. The agency head, or his or her designee, must consider the use of teleconferencing and other forms of electronic communication to meet the needs of the proposed activity before approving mission-critical travel.

This memorandum contains my determination regarding when travel by Department employees to foreign countries, other states, conferences, staff-training activities, or administrative functions will be considered critical to the mission of the Department of Elder Affairs. No state-paid travel activity that falls within any of these five categories may be authorized without the prior approval of the Deputy Secretary that the activity is mission-critical in accordance with this memorandum. As agency head, I reserve the right to determine on a case-by-case basis whether any specific travel activity is mission-critical for purposes of travel expenditures.

A. Foreign Travel

Effective July 1, 2009, until June 30, 2010, foreign travel by Department employees is not authorized. For purposes of this memorandum, “foreign travel” is travel to any jurisdiction which is not one of the fifty states of the United States, including any insular U.S. possession.

B. Travel to Other States or District of Columbia

Effective July 1, 2009, until June 30, 2010, travel by Department employees to other states of the United States or the District of Columbia which is not mission-critical will not be authorized. No travel to any other state or the District shall be considered mission-critical unless it meets one or more of the following criteria:

1. The purpose of the travel is for Department officials to represent the State of Florida at a national or regional government or professional function which relates to the State’s aging policy development and will be paid for by a federal grant.
2. The purpose of the travel is to enable the Department to play a required role in national or regional aging activities, including the formulation of model aging policy guidelines.
3. The purpose of the travel is to enable the Department to make a required appearance in a legal proceeding in a court of another state.
4. Travel that will be reimbursed by a third party.

C. Conference Travel

Effective July 1, 2009, until June 30, 2010, travel by Department employees for the purpose of attending conferences will not be authorized, regardless of whether the conference is located within the State of Florida or in any other jurisdiction, unless attendance at such conference is mission-critical. No conference shall be considered mission-critical unless it meets one or more of the following criteria:

1. Department attendance is limited to officers and employees attending solely for a Department presentation at the conference.
2. Department attendance is required to allow input into the formulation of rules, regulations, or policy proposals relevant to Department functional activities.
3. Department attendance is required due to conditions of a federal grant award.

D. Staff-training Travel

Effective July 1, 2009, until June 30, 2010, travel by Department employees for the purpose of attending staff-training activities located outside of the State of Florida will not be authorized. Travel by Department employees for the purpose of attending staff-training activities located in Tallahassee or elsewhere in the State of Florida may be authorized only if such staff-training activity is mission-critical. No staff-training shall be considered mission-critical unless it meets one or more of the following criteria:

1. Staff-training is required in order to provide basic supervisory training to Department supervisory and management personnel that cannot be provided via teleconference or other alternative means.
2. Staff-training is required to maintain mandatory certification or qualification requirements established by law.
3. Travel for training that is a requirement of a federal grant.

E. Other Travel

Effective July 1, 2009, until June 30, 2010, in-State travel by Department managers or employees for the general administrative purposes is not authorized. Only travel which is directly related to the direct supervision of the Department's regulatory and fiscal oversight functions will be considered mission critical. No administrative travel shall be considered mission-critical unless it meets one or more of the following criteria:

1. Travel necessary to complete nursing home assessments activities performed by personnel in the Comprehensive Assessment Review and Evaluation Program in the Department.
2. Supervisory activities that cannot be adequately performed via telephone or teleconference.
3. Travel related to fiscal and programmatic oversight to ensure compliance with federal and state guidelines and contract compliance.
4. Travel by department employees and volunteers in order to advise, assist and protect, investigate and resolve complaints made by or on behalf of state's elderly citizens who in live in long term care facilities.
5. Travel by department employees and volunteers in support of the Serving Health Insurance Needs of Elder Program.
6. Travel by department staff necessary to provide direct service for Florida's elders.

7. Travel to recruit and retain volunteers to serve Florida's elders in order to preserve the volunteer network.
8. Travel by department staff that is required to support the operation of the Department to include: travel related to mail delivery, travel related to required attendance at legislative hearings or various commissions and councils, and travel related to off site storage facility.
9. Travel by department staff to assist communities in Florida to enable seniors to remain viable in their communities through locally-defined initiatives in housing, transportation, senior employment, health and wellness, volunteerism and intergenerational initiatives that foster aging in place.