

The Business Law Section of The Florida Bar (“BLS”) Reimbursement Policy
****Effective September 5, 2023****

The purpose of this BLS Reimbursement Policy (the “Policy”) is to clarify the process for seeking reimbursement, outline the parameters of eligible reimbursement, and streamline the flow of the process. The creation of this Policy is not meant to discourage the seeking of reimbursement in any fashion. The oversight and implementation of the Policy is the responsibility of the Executive Committee, and as such the Executive Committee has the discretion to make exceptions in the best interest of the BLS.

I. Process and Timing

- A. Submit reimbursement requests using the Section/Division Reimbursement form attached as *Exhibit A*. Provide receipts for all items requested for reimbursement. Note that receipts must be itemized.
- B. Send all requests to the applicable Meeting or Program Chair (if no applicable chair then to the applicable Committee Chair directly) for approval within fourteen (14) days of the conclusion of the event.
- C. The Meeting Chair, Program Chair, or Committee Chair shall review the reimbursement request for eligibility and, if approved, send to the BLS Section Administrator for approval, and further review if necessary, within twenty one (21) days of the conclusion of the event.
- D. If the reimbursement request is in order, the BLS Section Administrator shall send each approved reimbursement request to the Treasurer for final approval. Once approved by the Treasurer, the BLS Section Administrator will process the reimbursement request(s) for payment.

II. Parameters for Items Eligible for Reimbursement. All reimbursement requests submitted to the BLS under this Policy are subject to the following parameters and restrictions. These parameters apply to Sections III, IV, and V of this Policy below.

- A. Airfare. The BLS will reimburse the cost of an economy or coach ticket for eligible airfare with a 21-day advance purchase. A copy of the ticket/receipt must be submitted showing the cost and class of ticket.
- B. Mileage/Tolls. The BLS will reimburse for travel via personal vehicle at the maximum rate per mile allowed by the IRS, currently \$0.655/per mile. Proof of mileage is required (map print out). Tolls will be reimbursed if receipts are provided.
- C. Taxi/Car Rental/Ride Share. The BLS will reimburse for the cost of taxi/car rental/ride share, or other form of ground transportation, at the most affordable

option. The cost of ground transportation will be reimbursed. Receipts are required, as well as a copy of the rental car agreement.

- D. Parking. The BLS will reimburse for basic parking at the meeting site and/or at the airport. Valet parking is not reimbursable unless it is the only parking option. A receipt is required.
- E. Lodging. The BLS will reimburse for a base-level, standard room with either two double/queen beds or a king bed, at the hotel where the event is held or a nearby equivalent (room, tax, and any required resort fee only). A copy of the hotel receipt is required.
- F. Meals. The BLS will reimburse for meals consistent with the Florida Bar per diem, currently \$60/day. All meals require a detailed receipt.
- G. Ticket Cost/Registration. The BLS will reimburse the cost of event registration for the main registrant only. Guest registration costs are not eligible for reimbursement.
- H. Items Not Eligible for Reimbursement. Alcohol is not eligible for reimbursement. Tips are not eligible for reimbursement.

III. BLS CLE Programs

Program Chairs, non-BLS member speakers, Academics, and Judges serving as speakers for BLS-sponsored Continuing Legal Education programs are eligible for reimbursement in conformance with The Florida Bar's Speaker Travel Reimbursement Form, attached as *Exhibit B*. All reimbursement requests must be made to the applicable CLE Program Chair as stated in Section I. Non-speaker program steering committee members are not eligible for reimbursement for these CLE programs. The following is a sample list of current CLE programs that the BLS conducts:

- A. IP Symposium. Section III policy applies without exception.
- B. Federal Securities Institute. Section III policy applies without exception.
- C. View from the Bench. Steering Committee members and law clerks of each panelist receive complimentary attendance to the seminar.
- D. Legislative Update/Judicial Roundtable. Section III policy applies without exception.
- E. One-Hour Virtual CLEs. These CLE programs are not eligible for reimbursement.
- F. Annual and Mid-Year Meetings. For purposes of the Bankruptcy Judicial Liaison Meetings, each of the Chief Bankruptcy Judges for each district and the Clerk of Court for each district are eligible for reimbursement as a speaker. Further, their

Judicial Liaison Dinner ticket is likewise eligible for reimbursement/complimentary attendance.

IV. Judicial and Academic Reimbursement**

A. Annual and Mid-Year Meetings. Any Academic or Judge who serves as a Judicial/Academic Chair or otherwise serves as a member of the Executive Council for the BLS is eligible for reimbursement/complimentary attendance for the following:

- i. Judicial Liaison Dinner ticket;
- ii. BLS Luncheon ticket;
- iii. Airfare;
- iv. Cost of hotel for up to two (2) nights;
- v. Meals not provided in the cost of the registration ticket (not to exceed \$60 per diem);
- vi. Mileage/Tolls/Parking or Taxi/Car Rental/Ride Share.

B. Labor Day Retreat. Any Academic or Judge who serves as a Judicial/Academic Chair or otherwise serves as a member of the Executive Council for the BLS is eligible for reimbursement for the following:

- i. Cost of registration ticket (not guest ticket);
- ii. Airfare;
- iii. Cost of hotel for up to three (3) nights;
- iv. Meals not provided in the cost of the registration ticket (not to exceed \$60 per diem);
- v. Mileage/Tolls/Parking or Taxi/Car Rental/Ride Share.

C. Executive Council Retreat. Any Academic or Judge who serves as a Judicial/Academic Chair or otherwise serves as a member of the Executive Council for the BLS is eligible for reimbursement for the following:

- i. Main Trip registration ticket (not guest ticket);
- ii. Airfare;
- iii. Hotel up to the length of the Main Trip;
- iv. Meals not provided in the cost of the Main Trip registration ticket (not to exceed \$60 per diem);
- v. Mileage/Tolls/Parking or Taxi/Car Rental/Ride Share.

** Section I and II reimbursement shall govern.

D. CLE Programs. For Judges or Academics speaking at CLE programs, Section III reimbursement shall govern.

V. IMF Fellows & Scholars

- A. The IMF Committee Chair is responsible for tracking all expenses of Fellows. The Membership Committee Chair is responsible for tracking all expenses of Scholars.
- B. Fellows have an annual stipend of \$2,500/year of eligible participation. If a Fellow does not use any portion of his/her Bar year annual stipend, such amount does not carry over into the following year.
- C. Scholars have an annual stipend of up to \$550/year of eligible participation. Such stipend consists of the registration fee of \$450 and reimbursement of up to \$100 for expenses (i.e. lodging, meals, travel). If a Scholar does not use any portion of his/her Bar year annual stipend, such amount does not carry over into the following year.
- D. The applicable Committee Chair shall gather all reimbursement requests from Fellows and Scholars after a meeting and provide approved requests to the BLS Administrator as set forth in Section I.