PURPOSE

The Travel Policy exists to promote professional and ethical standards for travel activities among grantees and service providers for the Robert Wood Johnson Foundation (the “Foundation”) and to ensure consistent and fair treatment for those who travel with Foundation support. This policy has been developed to ensure that good travel decisions can be made that are consistent with the Foundation’s Guiding Principles and institutional philosophy. Grantees and service providers should apply their best judgment and make choices consistent with good stewardship and accountability. If your organization’s travel policy and practices conflicts with a particular section (i.e., air travel) of this Policy, then grantees and service providers should make travel decisions that are consistent with prudent judgement, good stewardship of the Foundation’s charitable resources, and the objectives of this Policy.

Policy objectives are to: (1) comply with IRS rules governing expense reimbursement; (2) communicate Foundation rules governing business travel and entertainment; (3) describe expenses eligible for reimbursement; and (4) outline procedures to be followed.

As the steward of private resources that must be used in the public’s interest, the Foundation expects its grantees and service providers to exercise prudent judgment when making travel decisions and arrangements. Thoughtful consideration is to be given to the necessity or benefit of a trip, the number of people needed to conduct the required business, as well as advance planning to obtain advantageous rates and avoid unnecessary cancellation charges.

Grantees and service providers are strongly encouraged to consider using audio, video, or Web conferencing services as alternatives to traveling to meetings, when possible, and to consider best practices for lowering travel costs before making any travel plans.

TRAVEL APPROVALS

For grantees, your grant budget contains the necessary approved funds for travel related to your project. For service providers, travel that is anticipated to be reimbursed must be approved in advance in the form of a fully executed Foundation contract, purchase order or consultant authorization form. Persons traveling with Foundation financial support are responsible for familiarizing themselves and adhering to this policy.

RECEIPTS

Grantees and service providers should retain individual receipts for expenses greater than $25 for at least the term of the grant/contract, and including through the required reporting submission or audit period stated in the agreement with the Foundation. If your organization has a more restrictive record retention policy, then the grantee/service provider should follow their organization’s record retention policy.
AUTHORIZED / UNAUTHORIZED EXPENSES

- Expenses incurred during the time reasonably needed to accomplish the business purpose of a trip will be supported (grantees) or reimbursed (service providers), subject to eligibility and authorization requirements.
- The Foundation will not support/reimburse any expenses related to personal or other business travel. See *Combining Foundation-Supported Business Travel with Personal or Other Business Travel* section of this document.
- Expenses reimbursed by an outside party are not eligible for reimbursement by the Foundation. If the Foundation supports/reimburses expenses incurred by a grantee/service provider and the grantee/service provider later receives reimbursement by an outside party, the grantee/service provider must reimburse the Foundation for those expenses.

RWJF DESIGNATED TRAVEL AGENCY

- If you are not restricted to use a travel agency by your organization, the Foundation’s designated travel agency, FCM Travel Solutions ("FCM"), can be used to book all air, rail and car rental reservations related to Foundation-supported business.
- Please contact Erin Johnson, manager of Foundation Services, travel and meeting operations, at 609-627-7576 or ejohnson@rwjf.org for travel agency contact information.
- Travelers should make every effort to confirm reservations at least twenty-one days in advance for both domestic and international travel to optimize cost savings for the Foundation.

AIR TRAVEL

- Foundation funds may only be used for airfare expenses that adhere to the requirements outlined in this section.
- All air travel must be booked at the lowest airfare that reasonably meets business needs, not on a preferred airline if a less expensive alternative is available. However, travelers may select nonstop flights over connecting flights.
- Flight Classes
  - Nonrefundable coach or economy class airfare is the policy for all domestic flights.
  - Reasonably priced economy fare upgrades, such as extra legroom or aisle seats, are reimbursable for flights over three hours. Upgrades should not be more than $100 (domestic) and $150 (international).
- Frequent Traveler Programs
  - The Foundation permits travelers to retain frequent traveler program credits earned while traveling on Foundation-supported business. Travel plans, including airline, hotel, or rental car selections, should not be made with the accrual of frequent traveler program credits as a consideration if a less expensive alternative is available. Upgrades available through these programs that result in additional costs are at the traveler’s expense. Membership fees associated with these frequent traveler programs are not reimbursable.
- Personal Upgrades
  - Personal miles or coupons can be used to upgrade to a higher class, or a traveler may opt to pay personally for the price difference between coach and a higher class. The Foundation will not reimburse for these upgrade charges.
- Baggage Allowance
  - The Foundation will pay standard baggage allowance fees that are incurred while traveling. For most Foundation-supported business, fees for one checked bag are expected.
Ticket Changes
- Ticket change fees will be reimbursed if the change in travel arrangements is for Foundation business needs and has been requested by the Foundation. An explanation for these pre-approved ticket changes should be provided on the expense report documentation.

RAIL TRAVEL
- Train travel can be a viable alternative to air travel, especially when traveling for short distances.
- Amtrak – this service should be ticketed at the reserved coach class. Upgrades to business class and the Acela will not be reimbursed. Travelers may pay for upgrades at their own expense.
- Regional Rail – this service should be used when traveling to/from cities where this type of service is used regularly by business travelers. For example, NJ Transit should be used when traveling to/from New Jersey-based train stations and New York City.
- Ticket change fees will be reimbursed if the change in travel arrangements is for Foundation business needs and has been requested by the Foundation. An explanation for these pre-approved ticket changes should be provided on the expense report documentation.

GROUND TRANSPORTATION
The reasonable cost of ground transportation to and from places of business, hotels, restaurants, airports, and railroad stations in connection with Foundation-supported business activities is reimbursable. Travelers should seek to use the most economical method of ground transportation that is reasonable and practical. Where feasible, travelers should look to coordinate ground transportation with other travelers.

- Personal Car Usage
  - Reimbursement is intended to cover the cost of travel while on Foundation-supported business. Travelers will be reimbursed for business use of a personal automobile at the prevailing IRS mileage reimbursement rate for business miles traveled as well as for tolls, including those charged via an electronic toll collection device (e.g., E-ZPass, SunPass, etc.) and parking fees. In accordance with IRS standards, business miles are defined as all miles incurred on a personal automobile on a given day after deducting normal round-trip mileage to and from one’s home to one’s main place of business.
  - At airports, long-term or off-site parking generally should be utilized unless concerns about safety suggest otherwise.
  - Traffic or parking fines, or replacement of personal items lost or stolen from personal vehicles, are not reimbursable.

- Rental Cars
  - Travelers should rent a car only if lower-cost transportation is unavailable or impractical. All rental cars must be booked at the midsize or lower unless a larger car is required for the number of travelers or will not result in a materially higher cost.
  - The traveler should fill the tank with gas and return the car on time to avoid excess charges. Tolls, including those charged via an electronic toll collection device (e.g., E-ZPass, SunPass, etc.) and parking fees are reimbursable. Traffic or parking fines, or replacement of personal items lost or stolen from personal vehicles, are not reimbursable.

- Local Transportation/Car Service
  - Travelers on Foundation-supported business may utilize taxis, ride-booking services (e.g., Uber, Lyft, etc.) or car services for transportation to and from airports and train stations. Taxis and ride-booking services often are more economical options and are reimbursable.
For those traveling to and from the Foundation and area airports, a car service may be utilized. The Foundation has vetted and negotiated preferred rates with Concorde (New Jersey/Pennsylvania) and Business Class Limousine (New York City). Please advise the vendor that you will be using the Foundation’s negotiated rate.

Free airport shuttle transfers to hotels at the traveler’s destination should be used whenever practical.

LODGING

- Travelers should prioritize cost when selecting lodging, but also balance proximity to the destination. To the extent possible, travelers should:
  - Seek opportunities to minimize lodging costs by making reservations well in advance (at least 21 days);
  - Take into account transportation, parking, and complimentary amenities (Wi-Fi, meals) when comparing hotel rates;
  - Avoid overnight stays if morning travel (i.e., travel begins at 6:00 a.m. or later) is feasible and reasonable.
- Travelers should avoid hotels that appear inappropriate by virtue of price and/or appearance. Accordingly, five-star hotels, or those classified as “luxury” or “resort” hotels, should not be used unless the hotel also is the conference location. The length of stay in any destination should be justified by the pre-arranged business meeting agenda. When attending conferences, conventions, annual meetings or seminars, the traveler should stay in the hotel with the conference-negotiated discounted rate or a hotel with a lower rate.
- Travelers will be reimbursed for reasonable lodging expenses based on actual expenditures while on Foundation-supported business. Travelers should use the guideline of no more than $250 per night plus room tax/fees for hotel accommodations. Reasonable exceptions will be made for certain high-cost locations where available rooms may exceed the $250 per night room rate guideline (e.g., Boston, London, Los Angeles, New York, San Francisco, and Washington, D.C.). In no event should the room rate exceed $400 per night plus room tax/fees.
- Travelers must obtain an itemized hotel bill to be eligible for lodging expenses. An itemized hotel bill should include the name and location of the hotel, check-in and check-out dates, and separate amounts for charges such as lodging, meals, and parking. It is the traveler’s responsibility to review hotel bills for accuracy.
- Apartment shares or rentals, including through Airbnb, VRBO, or similar services are not supported/reimbursable.
- Grantees and service providers can take advantage of the Foundation’s negotiated hotel rates when traveling to the Foundation in Princeton, N.J. Currently, the Foundation has negotiated rates with the Westin Princeton at (609) 452-7900 and Marriott Princeton at Forrestal at (609) 452-7800. Be sure to advise the hotel that you would like to utilize the Foundation’s negotiated rate.

MEALS

- Meals are categorized as standard meals or business meals:
  - Standard meals – Meals or snacks purchased by travelers while on Foundation-supported business. Refers to meals when a traveler’s dining charges cover just themselves.
  - Business meals – Meals with attendees such as grantees, contractors, speakers, or other outside colleagues during which specific program or business discussions take place.
- Meal Limits
  - The Foundation will support/reimburse for individual meals, refreshments, and snacks up to a maximum of $100 per day. This includes service charges, taxes, and tips. The limit is a maximum reimbursable limit, not a per diem. The total reimbursement allowance for any one meal is $75. Amounts exceeding the maximum will not be reimbursed.
When attending conferences/events, the grantee/service provider will only be reimbursed for meals when not provided through the conference/event.

Travelers are expected to use good judgment regarding the choice of restaurants and meal costs, limit the purchase of alcoholic beverages, and ensure costs are well within business norms for both the relevant location and the use of our charitable funds. Travelers also should exercise good stewardship by adjusting the daily limit when traveling for partial days.

Use of Alcohol
- Travelers are expected to use good judgment and limit the purchase of alcoholic beverages. Alcohol is only supported/reimbursed as part of a meal and will be included in the $100 per day maximum noted above. Purchases of alcohol from a retail store or mini-bar are not reimbursable regardless of where or with whom they are consumed.

Special Guidance for Business Meals
- To receive support/reimbursement for business meals, travelers must include the following documentation in their expense reports:
  - Names, titles, and affiliations of all guests.
  - Date and location of the business meal.
  - The nature of the business discussed.

GRATUITIES
- Gratuities for meals, taxi rides, etc., are expected to be in the 15–20 percent range. A general guideline for housekeeping is $5/day; for baggage handling, $2/per bag.

INTERNET CONNECTIVITY
- Travelers will not be reimbursed for internet access fees.

CELL PHONE
- Travelers will not be reimbursed for business calls nor data plans while on Foundation-supported business.

MISCELLANEOUS EXPENSES
The Foundation will not support the following expenses:
- Access fees to a spa or fitness center within or nearby the traveler’s hotel
- Travel size over-the-counter medications or toiletries
- Movies or other forms of entertainment
- Magazines, books, or other reading materials
- Laundry, dry cleaning, or shoe shine services
- Miscellaneous personal expenses

COMBINING FOUNDATION-SUPPORTED BUSINESS TRAVEL WITH PERSONAL OR OTHER BUSINESS TRAVEL

When combining personal travel or other business travel with Foundation-supported business travel, the reimbursement of travel expenses will depend upon the primary purpose of the trip based on the following guidelines:
- **Primarily Foundation-supported business** – If a trip is primarily for Foundation-supported business, travelers will be reimbursed for travel expenses that include the cost of traveling to and from the business destination and any business-related expenses incurred while engaging in Foundation-supported business. Generally a trip is considered primarily Foundation-supported business when the number of days spent on Foundation-supported business activities exceeds those spent on personal or other business activities.

- **Primarily personal or other business** – If the trip is primarily for personal or other business reasons (such as vacation or providing services to another client), travelers will not be reimbursed for the costs of traveling to and from the destination (even if some Foundation-supported business was accomplished on the trip), or for any costs incurred for personal or other business activities. Generally, a trip is considered primarily personal or other business when the number of days spent on personal or other business activities exceeds those spent on Foundation-supported business activities.

- Combining personal or other business travel with a Foundation-supported business trip is acceptable when there is no increased cost to the Foundation. The traveler must clearly document that the personal or other business portion of the trip did not increase the cost to the Foundation. This may be accomplished by requesting same-day quotes from FCM or another travel agency both with and without the personal or other business travel time or items included. Any increased costs as a result of personal or other business activities (e.g., higher airfare, larger hotel room, significant personal usage of rental car) must be calculated and itemized as a personal or other business expense, and these increased costs will not be supported/reimbursed.

### EXTENDED STAYS

- If a traveler is staying over a weekend between two Foundation-supported business trips and 1) the stay is in one of the two business destinations; and 2) the cost to stay is cheaper or equal to flying home for the weekend, then the cost of the weekend stay is reimbursable. Documentation of the fare differential must be clear and specific, and accompany the expense report. If, however, the traveler chooses to fly somewhere else over the weekend for personal or other business reasons, the weekend costs would not be reimbursed.

- If a traveler elects to extend a business trip over a Saturday night, rather than return home once business is completed, expenses of meals, local transportation, and lodging will not be reimbursed, even if extending the stay results in airfare savings to the Foundation.

### INTERNATIONAL TRAVEL AND TRAVEL TO NONCONTIGUOUS STATES

Travel to international locations, and to Alaska, Hawaii, and Puerto Rico, requires approval and coordination by your Foundation point of contact. Foundation personnel will reach out to Law and Finance, as needed, to provide guidance on international travel. International travelers should ensure that their passports are valid and that they obtain any required visas. The Foundation will not reimburse for the cost of passports, visas, or other travel documentation fees.

### GOVERNMENT OFFICIAL TRAVEL

Travel by government officials requires advance approval and coordination by your Foundation point of contact if the travel will be reimbursed directly by the Foundation, arranged by a service provider, or arranged by a grantee that is not a public charity or government entity. Foundation personnel will reach out to Law and Finance, as needed, to provide guidance on government official travel.