

Travel Guidelines for Robert Wood Johnson Foundation Grantees

Updated: July 2010

PURPOSE

The Travel Guidelines exists to promote professional and ethical standards for travel activities among grantees of the Robert Wood Johnson Foundation (the "Foundation") and to ensure consistent and fair treatment for those who travel on the Foundation's behalf. Grantees should follow the travel guidelines of their own host institution if it is more restrictive or you are required to do so.

The objectives of the Guidelines 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 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 are strongly encouraged to consider using audio, Web, or videoconferencing 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

Your grant budget contains the necessary approved funds for travel related to your project. Persons traveling on Foundation grant business are responsible for familiarizing themselves and adhering to these guidelines.

RECEIPTS

Grantees should retain individual original receipts for expenses greater than \$25 for a period of five years from the date the expense is incurred for all travel expenses that are funded by a Foundation grant.

AUTHORIZED EXPENSES

- Expenses incurred during the time reasonably needed to accomplish the business purpose of a trip will be supported with Foundation grant funds.
- The Foundation will not support expenses related to the extension of a business trip for personal reasons before, during or after the business portion of the trip. Foundation grant funds will not support expenses reimbursed by an outside party. If Foundation grant funds were used to support expenses incurred by a grantee and the grantee later receives reimbursement by an outside party, the grantee must reimburse the Foundation grant account for the full amount paid by the outside party.

FOUNDATION DESIGNATED TRAVEL AGENCY

- If you are not restricted to use a travel agency by your host institution, the Foundation's designated travel agency, Directravel DirectLink® online system (Directravel), should be used to book all air, rail, and car rental reservations needed related to Foundation grant business.
- Please contact Kristine Nasto, Director of Foundation Services (609-627-5737) or knasto@rwjf.org for Directravel contact information.

AIR TRAVEL

- Foundation grant funds will be used to support domestic air travel in coach class. Non-refundable e-tickets should be booked whenever possible. Air travel via business or first class will not be supported. However, business class travel is permitted for pre-approved international travel exceeding six hours. Due to the distance and potential expenses that may be involved, international travel is defined as all travel to areas outside the contiguous 48 states. Trips to Alaska, Hawaii, Puerto Rico and Canada are considered international.
- Upgrades at the expense of the Foundation are not permitted.
- Grantees are expected to make every reasonable effort to book travel at least 14 days before departure to take advantage of the best airfare rates.
- Any flight selection to qualify for frequent flyer miles that result in an additional cost to the Foundation will not be supported.
- Any flight selection to accommodate personal travel either before or after the business portion of a trip that results in an additional cost to the Foundation will not be supported
- The cost of checking the first piece of baggage will be supported by the Foundation, but the grantee is responsible for the cost of additional checked bags, unless a lengthy stay requires additional baggage.
- Fees for changing air travel arrangements will not be supported, unless they are made as a result of a request from the responsible Foundation Officer.

RAIL TRAVEL

- Train travel should be booked at the lowest available fare using regional trains. Upgrades to business class will not be supported.
- Amtrak's Acela travel is not permitted unless used as an alternative to flying when it is less expensive.
- NJ Transit should be used for all travel to and from New Jersey and New York City.

LODGING

- Grantees are expected to avoid overnight stays if morning travel (i.e., travel that begins a 6:00 a.m. or later) is feasible and reasonable.
- Foundation grant funds will support reasonable lodging expenses. Every effort should be made to book lodging at the lowest reasonable rate in cost for the local area.

- If hotel reservations need to be cancelled, it is the grantee's responsibility to notify the hotel directly in time to avoid "no show" charges. Foundation grant funds will not support "no show" charges unless a reasonable explanation of extenuating circumstances is provided.
- Membership fees associated with hotel frequent guest programs are the responsibility of the traveler. Any hotel selection to qualify for these programs which results in an additional cost to the Foundation is not permitted.
- Grantees using Foundation grant support should refrain from booking conferences at luxury hotels (five-star) and resorts.
- Overnight stays at five-star hotels or luxury resorts will not be supported, unless the hotel is the conference location and the conference is not funded by a Foundation grant
- The following miscellaneous hotel charges will be supported, but should be reasonable in cost:
 - Basic health club fees at the hotel at which you are a registered guest
 - Internet or other connectivity charges
 - Housekeeping gratuities or baggage handling charges
 - Hotel parking
 - Room service, subject to meals guidelines
 - Copier and fax charges
 - Laundry charges on trips of three days or more
- Grantees are encouraged to 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, Marriott Doral Forrestal hotel at (609) 452-7800, Holiday Inn Princeton at (609) 520-1200 and the Doubletree at (609) 452-2400. Be sure to advise the hotel that you would like to utilize the Foundation's negotiated rate when making reservations.

GROUND TRANSPORTATION

- Foundation grant funds will support transportation to and from airports and train stations when traveling on Foundation-related business.
- Grantees are expected to use the least costly means of transportation including airport shuttles or taxis when possible.
- Grantees traveling to and from the same location are expected to share transportation where practical.
- Foundation grant funds can support mileage for the use of a personal vehicle at the prevailing IRS mileage reimbursement rate. This rate covers the cost of operating your automobile, including gasoline.
- Renting a car is permitted when other, less expensive forms of transportation are not available. Grantees are expected to reserve cars that are reasonable in price and size.
- Tolls and parking will be supported.
- When traveling to and from the Foundation, grantees may utilize Foundation preferred vendors for their ground transportation. In the Princeton area, the Foundation currently uses AAA Taxi

(800-481-8294) for transportation between Trenton and Princeton Junction station or the Princeton area. For airport transportation (Newark or Philadelphia) the Foundation uses Concorde Limo (888-426-6267). Be sure to advise the service supplier that you are looking to utilize the Foundation's negotiated rate. Grantees must pay the driver directly at the time of service.

MEALS

- The maximum limit for any one meal is \$65 per person and the daily maximum meal allowance is \$100, including tax and gratuity. Amounts exceeding the maximum will not be supported with Foundation grant funds.
- If a grantee pays for the meal of a business associate when traveling together on Foundation business, the meal reimbursement carries the same limitations stated above. Receipts or other supporting documentation must include the names and titles of all participants at the meal for which support is requested. Grantees should retain the receipts in accordance with the receipts section of these guidelines. Amounts not properly documented or in excess of the limitations described above, will not be supported with Foundation grant funds.

GRATUITIES

- Gratuities for meals, taxi rides, etc., are expected to be in the 15-20% range.

GENERAL

- The Foundation will support reasonable phone charges incurred by a service provider while traveling on Foundation business.
- Foundation grant funds will not support the following charges::
 - Movies or other forms of entertainment
 - Toiletries
 - Magazines, books or other reading materials
 - Shoeshine service
 - Fees for spas or health club facilities not affiliated with your hotel
 - Personal expenses
 - Business telephone calls not related to Foundation business