



## JELF Employee Travel Expenses & Procedures

Employees may be required to travel for business-related purposes, such as attending meetings, events, or donor engagements. When traveling for work, employees are expected to make responsible, economical choices, always considering the best interest of the organization's mission and budget.

### Meals and Entertainment

- **Individual meals while traveling** (breakfast, lunch, dinner) are reimbursable, but employees should choose modest dining options, meaning casual or mid-range restaurants as opposed to fine dining establishments. If breakfast is included in the hotel cost, a separate breakfast will not be reimbursed – unless it is a donor meeting. Meals should reflect good judgment and reasonable pricing based on the location.
- **Meals with a donor or external guest** are reimbursable and should be appropriate to the relationship and setting. A receipt and explanation of who was hosted and the purpose of the meal must be submitted.
- **Meals with other employees** while traveling are reimbursable. Outside of travel, casual or social meals with colleagues are not reimbursable unless pre-approved and have a clear business purpose.
  - When a meal or expense involves **multiple employees**, only one employee should pay and submit the receipt for reimbursement, along with the names of all participants and the business purpose. Duplicate submissions for the same expense are not allowed.
- **Alcohol** is generally not reimbursable. However, in donor or external business settings, if the donor or guest orders an alcoholic beverage and it is appropriate to the setting, a modest alcoholic beverage may be included. Employees should exercise good judgment, and any alcohol expenses must be clearly explained when submitting for reimbursement.
- **Tips** should be reasonable (typically up to 20%).
- **All reimbursed meals** must include documentation of how many people were present and the business purpose of the meal (e.g., donor meeting, strategy discussion, solo meal during conference attendance). This should be noted when submitting receipts.
- **If you are ever unsure** whether a meal or expense is appropriate for reimbursement — such as when dining with a donor, colleague or paying for your own meal while traveling — please check with your supervisor in advance. When in doubt, always ask. JELF understands that not every situation is black and white, and it's better to confirm ahead of time than to assume.

## Booking and Planning

- All business-related travel must be approved in advance by a supervisor.
- Employees should use sound judgment when deciding whether to fly or drive. As a general rule, if the destination is within a 5-hour driving radius (approximately 350 miles), employees are encouraged to drive unless flying is significantly more cost-effective or time-saving.
- When travel exceeds a 5-hour drive, employees should consider flight options and compare costs, travel time, rental car cost and other logistical factors. The goal is to balance efficiency, cost, and staff well-being.
- Employees should always use the organization's preferred travel platform or booking method, if one exists.
- Travel should be booked in advance whenever possible to secure the lowest rates.
- Lodging should be modest and reasonably priced. Employees are expected to book standard rooms at clean, reputable hotels located in safe areas. Luxury hotels or upgrades require prior approval. If no reasonably priced option is available in a safe location, employees should discuss alternatives with their supervisor.
- Rental cars may be booked when necessary. JELF will reimburse for small or mid-size / economy vehicles for up to four individual(s). If transporting multiple people or materials, JELF will reimburse for a larger vehicle.
- When available, rideshare (e.g., Uber or Lyft), taxis, or public transit should be used if more cost-effective than a rental car.
- Travel insurance is not reimbursable unless specifically required for the trip.

## Other JELF Travel Standards

- **Parking, tolls, necessary baggage fees, and Wi-Fi charges** are reimbursable with receipts.
- **Personal expenses** incurred while traveling (e.g., movies, mini bar, personal toiletries) are not reimbursable.
- Employees may **extend** trips for personal reasons (e.g., adding a weekend stay), but the organization will only reimburse for the business-related portion of the travel (e.g., airfare cost if it would be the same regardless of extended stay, hotel nights used for business purposes).
- Employees may **enhance** their trip—such as choosing a more upscale hotel, traveling with a partner, dining at a fine restaurant, or upgrading airfare—but JELF will only **reimburse** up to the modest or reasonable amount that would have been spent for standard travel accommodations. The difference in cost for enhancements is the employee's personal responsibility.
- **Reimbursement requests** must be submitted within 30 days of return, with itemized receipts and appropriate explanations.

- Employees are responsible for any **finances, penalties, or citations** incurred while traveling, including but not limited to parking tickets, traffic violations, or airline fees resulting from personal oversight. These are not reimbursable.
- If an **airline loses an employee's luggage** during business travel and the employee must purchase essential items (e.g., toiletries, one or two clothing items), JELF will reimburse reasonable and necessary expenses. Receipts and a brief explanation of the situation must be submitted. Non-essential or luxury purchases will not be covered.

### **Responsibility**

Employees are expected to exercise sound judgment and act in alignment with JELF's values of professionalism, integrity and purpose-driven decision-making. Travel and expense choices should reflect our responsibility to the students we serve — being cost-conscious, transparent, and thoughtful with organizational funds. All expenses submitted for reimbursement must be clearly documented, and employees are encouraged to ask questions whenever unsure.