

February 2026

## **Burroughs Wellcome Fund Travel & Expense Reimbursement Policy**

The Burroughs Wellcome Fund (BWF) Travel and Expense Reimbursement Policy is provided to employees, board and committee members, awardees, and other guests, contractors, etc. (TRAVELERS) regarding payment and/or reimbursement for reasonable costs incurred to participate in BWF meetings or the conduct of BWF business. If you have specific concerns about this policy, please contact the Meetings department at [bwf.meetings@bwffund.org](mailto:bwf.meetings@bwffund.org)

It is impossible to cover every travel scenario in this policy. In general, TRAVELERS are asked to consider options that utilize BWF resources most responsibly and efficiently. Expenses should be appropriate for a nonprofit organization to avoid any appearance of impropriety or personal benefit and must be documented with receipts to satisfy audit and tax law requirements. Additional information relevant to BWF employees may be found in the employee handbook.

**Accessibility and Accommodations:** BWF is committed to ensuring full access and participation for individuals with disabilities. In accordance with the ADA, reasonable accommodations may be provided when essential for participation in BWF events or for travel conducted on behalf of BWF. To allow time for review and implementation, requests should be made in advance when possible. TRAVELERS should contact the Meetings Department at [bwf.meetings@bwffund.org](mailto:bwf.meetings@bwffund.org). All requests are reviewed on a case-by-case basis.

Situations that may be in conflict with this policy must be reviewed prior to the purchase of any travel arrangements. BWF recognizes that circumstances can occur that prohibit prior approval. However, TRAVELERS should communicate these instances prior to requesting reimbursement to avoid misunderstandings and delays in the process. Failure to communicate may forfeit rights to reimbursement.

When expenses are not paid directly by BWF, detailed and itemized receipts must be submitted for reimbursement. NOTE: Transactions from credit card/bank account statements or other payment processors are not acceptable receipts. Receipts should clearly reflect dates, amounts, and some form of information showing what the expense is. Requests for reimbursement must be submitted within 30 days of the conclusion of the BWF-related travel.

BWF uses SAP's cloud-based system CONCUR for expense reimbursement processing. Non-employee TRAVELERS can expect to receive an email containing instructions within five business days following the conclusion of BWF events.

All reimbursements will be made in US Dollars (USD). Receipts in other currencies should be entered in CONCUR reflecting the original currency. CONCUR will convert the amount to USD.

### **Multipurpose Travel**

TRAVELERS may need or want to combine BWF-related travel with other travel. Examples include overlapping or consecutive business trips or extending a trip for personal reasons. These situations must be communicated with BWF's Meeting Professional in advance when planning and booking arrangements.

BWF will cover costs for the defined duration of the BWF-related portion of the trip. Any additional lodging, meals, and transportation costs will not be covered by BWF.

When airfare is booked to accommodate additional travel and the TRAVELER requires reimbursement, provide the detailed receipt of what was purchased, as well as documentation of what would have been purchased for BWF only purposes. This price comparison documentation must be done at the time of purchase of the alternate option. BWF will reimburse the lower amount. If a TRAVELER chooses to drive instead of fly, BWF will reimburse mileage if the round trip mileage reimbursement is less than the airfare. If not, BWF will reimburse what the airfare would cost.

### **Travel Companions**

Expenses for travel companions are not covered by BWF unless explicitly stated in specific meeting or event materials.

For non-employees, when travel companion costs are covered by BWF, the additional costs paid will be reported by BWF to the IRS on Form 1099 when these costs plus any other compensation, such as honoraria, exceed reporting threshold amounts in a calendar year. This can include, but is not limited to increases in meals, travel, entertainment, and/or lodging costs.

### **Booking Travel Accommodations**

BWF has a relationship with World Travel to assist with booking travel accommodations. They can be reached by telephone at (877) 778-8716 or email at [greenteam@worldtrav.com](mailto:greenteam@worldtrav.com). Identify yourself as a traveler with Burroughs Wellcome Fund. Alternatively, BWF's Meetings Department can contact World Travel for you if necessary. They can be reached at [bwf.meetings@bwfund.org](mailto:bwf.meetings@bwfund.org). BWF Employees are encouraged to use the CONCUR Travel system to make travel arrangements. Any travel expenses paid directly by BWF should not be included in reimbursement reports submitted in CONCUR.

### **Air Travel**

For events organized through Cvent (participants receive an email invitation with a link to a registration website), air travel must be booked directly through the registration system. A World Travel agent will contact you by email to finalize your booking.

World Travel has been instructed to encourage all travelers to select the lowest fare possible for each trip taken on behalf of BWF. BWF will purchase non-refundable coach/economy class airline tickets. Upgrades within coach will be covered. Air travel consisting of ten hours or more of flying time **one way** is eligible for business class. TRAVELERS may use their own frequent flyer miles or personally pay extra to upgrade to business or first class on other flights. TRAVELERS who wish to participate in frequent flyer programs do so at their own discretion.

Additional air travel-related expenses eligible for reimbursement with receipts include checked baggage fees and inflight Wi-Fi. Tips to skycaps are also reimbursable. Checked baggage fees are limited to one bag each way at the standard base cost; charges for overweight or extra bags are not reimbursable.

### **Ground Transportation**

When needed, BWF encourages the use of the most economical ground transportation options and will reimburse such expenses including tips. Examples of acceptable options include taxis, airport shuttle services and public transportation services (buses or subways). Ride-sharing services (i.e. Uber and Lyft) are reimbursable. Upgrades that may be viewed as extravagant or luxury are not reimbursable. Ground transportation costs will be reimbursed for BWF-related activities only.

### *Personal Vehicles*

For convenience or economy, TRAVELERS may occasionally choose to use their own vehicles when traveling for BWF purposes. In these instances, TRAVELERS will be reimbursed at the standard IRS mileage rate in effect on the dates of travel. Toll and parking charges are reimbursable, but fuel costs, or charging costs in the case of electric vehicles, are not.

Mileage should be entered in CONCUR Expense using the built-in mapping feature by selecting Personal Car Mileage expense type and entering complete addresses for starting and ending points. If you have multiple travel points, they should all be reflected in CONCUR. **Do not combine multiple days into one entry; each day of travel should be recorded separately.**

Employees should refer to the Employee Addendum for additional employee-only guidelines.

BWF will not be responsible for the costs of repairs or damage to a personal vehicle incurred while traveling for BWF purposes. Likewise, any traffic tickets received by an individual during BWF travel, including both moving and non-moving violations, are the responsibility of the individual. BWF is also not liable for any third-party damage and/or injury that results from the use of a personal vehicle.

#### *Rental Vehicles*

Rental vehicles must be approved in advance and should represent the most economical ground transportation option. Only non-luxury class vehicles should be reserved. Electric or hybrid vehicles are allowed when the cost is comparable. Gas purchases and electric charging fees for rental vehicles are reimbursable.

As with the use of personal vehicles, BWF will not be responsible for traffic tickets (including both moving and non-moving violations), repairs, or damage to a rental car. BWF is also not liable for any third-party damage and/or injury that results from the use of a rental car. Individuals should purchase the physical damage waiver insurance offered by the rental car company, which is reimbursable by BWF.

#### **Lodging**

Events organized and hosted by BWF will generally have a block of dedicated hotel rooms when overnight lodging is necessary. These accommodations are reserved through the event registration website and billed directly to BWF.

When traveling for other purposes where overnight lodging is necessary, reservations should be made at “full service, well appointed” hotels while avoiding properties that might be described as “extravagant or luxury.” While this description is not precise, it is a general common-sense description to guide hotel selection.

All rooms, taxes, and gratuities will be paid or reimbursed by BWF. Basic internet service at hotels is also covered, if it is not provided as part of the room fee. Valet parking charges are only covered when self-parking is not an option.

BWF will not pay for or reimburse TRAVELERS for: pay-per-view charges, health clubs, spa services, gift shop purchases, site-seeing fees, telephone calls, or any other expenses incurred by the individual which would be considered personal.

#### **Meals**

BWF will reimburse reasonable, actual expenses of a traveler’s meals plus tips. Expenses for meals and the choice of restaurants are expected to be appropriate for a nonprofit organization. Itemized receipts must be provided. In the instances where a restaurant provides a separate, summary credit card receipt where gratuity is added, this must be submitted **in addition** to the itemized receipt showing what was purchased.

When group meals are organized at BWF events (breakfast, lunch, or dinner), outside food purchased will not be eligible for reimbursement.

The IRS considers business travel to be concluded upon returning to your home city or general area. This also applies when continuing travel for non-BWF purposes. Food and drink purchases after that point, whether the traveler returns home or continues on for personal travel or non-BWF business, are not eligible for reimbursement.

#### **Non-Reimbursable Expenses**

The following expenses are considered personal or non-work-related and are **not eligible for reimbursement** under BWF's travel policy:

- Personal items
- Laundry services
- Health clubs
- Childcare
- Magazines/newspapers
- Pay-per-view charges
- Spa services
- Site-seeing fees
- Telephone calls
- Credit, debit, and charge card fees (including interest, annual costs, etc.)
- Lost or stolen goods
- Repairs or damage to a personal vehicle incurred while traveling for BWF purposes
- Traffic tickets (moving and non-moving violations, including parking fines)
- Third-party damage and/or injury resulting from the use of a personal vehicle
- **Travel insurance (unless there are extenuating circumstances and prior approval has been obtained)**
- **Frequent flyer memberships and airline lounge fees**

This list is not exhaustive. BWF reserves the right to determine, at its sole discretion, whether any expense is personal or non-reimbursable. TRAVELERS are encouraged to seek clarification **before** incurring any questionable expenses, as reimbursement is not guaranteed.

Guidelines for specific meetings may differ from this policy.

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