



TRAVEL POLICIES AND PROCEDURES

PURPOSE:

In support of Match Education's ("Match") mission, employees and AmeriCorps members ("staff" or "travelers") may have reason to travel in an official capacity, including, but not limited to, attending professional conferences, interfacing with stakeholders, recruiting staff/students, and observing other organizations. Given Match's responsibility as a steward of public funding, and inherent budgetary constraints, such travel should only be undertaken when it is deemed to be absolutely necessary and advantageous to the advancement of the mission. **The purpose of the Travel Policies and Procedures (the "Travel Policy") is to ensure that travel is undertaken judiciously, that costs are incurred prudently, and to minimize administrative burden resulting from travel.**

STATEMENT OF PROTOCOL:

Match will pay for, or reimburse, qualifying *incremental costs*¹ incurred by staff as a direct result of travel, provided that expenses are incurred in accordance with the policies contained herein. If a circumstance arises that is not specifically covered in the travel policies, the most conservative course of action should be adopted. Designated approval authorities, including the business office, are required to review expenditures and withhold reimbursement if there is reason to believe that expenditures are inappropriate or extravagant.

ADMINISTRATIVE GUIDELINES:

Travel must be authorized by the traveler's supervisor and the Director of Operations of the traveler's school/business unit, if applicable. Absent extenuating circumstances, travelers should ensure that high-cost expenses (e.g. flights, hotels, rental cars) are purchased by the head of his/her business unit, who will use a Match American Express credit card. Other incremental costs may be reimbursed through Match's reimbursement software, Tallie.

DOCUMENTATION PROCEDURES:

To ensure timely reimbursement and payments to vendors, staff must:

1. Attempt to remove taxes on purchases by providing a copy of the appropriate (i.e. [School](#) or [Foundation](#)) tax exemption certificate to the vendor. Tax exemptions certificates can also be found under "Tax Exemption Certificates" on the Finance Office Website (**note** Not all vendors can remove taxes, especially if the vendor is located outside of Massachusetts);
2. Obtain original, itemized, receipts that clearly indicate the vendor name, transaction date, item(s) purchased, unit cost, and total receipt amount:
 - a. Purchases of personal items and/or entertainment expenses should not be included on receipts submitted for reimbursement. Please obtain separate receipts for personal items when possible;

¹As a guiding principle, please keep in mind that "staff should not be financially penalized for work travel but neither should they benefit." Travelers should only submit for reimbursement incremental costs above expenses that the individual would have incurred if they were not traveling.



- b. Purchases from non-business vendors (e.g. yard sales, Craigslist, etc.) are not allowed; and
3. Follow all Tallie reimbursement polices found on the Finance Office Website.

TRANSPORTATION POLICIES:

Travelers should incur the lowest reasonable transportation expenses, and abide by the following guidelines:

1. Airplane/Train:

- Staff should book tickets at least 14 days, and preferably 30 days, in advance of the departure date to avoid increased fares:
 - i. Costs incurred by traveler's failure to cancel or modify reservations in a timely fashion are not reimbursable. This includes fees to change flights.
 - ii. E-tickets/receipts must show the method of payment and indicate that payment was made. A travel confirmation with estimated costs is not considered a receipt or invoice.
 - iii. Travelers may not give preference to a particular airline or provider
- First/business class, premium seating, early boarding, and other similar amenities are not eligible for reimbursement or purchase.
- Staff are encouraged to avoid baggage fees whenever possible. Such fees will only be reimbursed when there is a compelling reason for an individual to check a bag (e.g. the traveler must travel with a case of recruiting materials).
- **Taxis/ ride sharing services (e.g. Uber)(collectively, "taxi") to and from airports/train stations will only be reimbursed when public transportation is not available, or when the ride is required outside of normal work hours (i.e. early morning and late evening).**
- Should a traveler wish to book a trip for dates beyond those required by official business for personal reasons, he/she must make a good faith effort to determine and document an accurate fare price differential (i.e. submit a screenshot to his/her supervisor) and will be responsible for paying any resulting increased costs.

2. Automobile:

- **Commercial rental vehicles** should be utilized only when a rental vehicle is more cost-effective than any other type of transportation, or if the destination is not otherwise accessible:
 - i. Travelers should take advantage of Match's standing discount of up to 25% with Avis and Hertz:
 1. **HERTZ:** Discount Code – 1791978, PIN Number – BAPGOLD;
 2. **AVIS:** When reserving a vehicle online, click "I Have a Discount Code", and enter AWD #S023600;
 - ii. Travelers must rent the most economic vehicle available;
 - iii. Travelers should be aware of insurance coverage that may be provided by their personal auto insurance, by the purchasing credit card, or other sources. Rental insurance should be purchased only when needed;
 - iv. Reimbursement for tolls incurred while driving rental cars on official business *is* allowed;
 - v. Gasoline purchases for rental vehicles are reimbursable with receipts. Rental vehicles are the only types of vehicles for which Match allows gasoline reimbursements;



1. Travelers must fill the gas tank before returning the vehicle to the rental agency to avoid increased fees; and
 - vi. Parking tickets and other fines for driving violations are not reimbursable.
- **Taxis** will be reimbursed only when they are the most cost-effective mode of transportation, or when public transportation is not available.
- **Personal automobiles** may be utilized when travel is required outside of the scope of staff's normal job duties, and are reimbursable only when such travel directly causes the employee to incur incremental additional costs:
 - i. Reimbursement for usage of a personal automobile is based solely on the IRS mileage rate. This rate represents reimbursement for all vehicle related expenses including, but not limited to, gasoline, wear and tear, and personal auto insurance. Gasoline purchases for personal automobiles are not reimbursable.

LODGING POLICIES:

Travelers will be reimbursed at the single room rate in a "business economy" or "budget" hotel for the reasonable cost of hotel accommodations. Convenience, the cost of staying in the city in which the hotel is located, and proximity to other venues on the individual's itinerary should be considered in determining reasonableness:

1. If the lodging receipt shows more than a single occupancy, the single room rate must be noted. If reimbursement for more than the single room rate is requested, the name of the second person must be included in a note in the reimbursement request.
2. Travelers should take advantage of discounted room rates whenever possible;
3. The nightly rate per person must be less than the per diem lodging rates set for each city by the U.S. General Services Administration. Travelers should determine the maximum rate by searching the city where they will be staying using [this link](#):
 - a. Travelers should note that maximum rates are calculated using historic pricing trends, and as such, rates vary by month.

MEALS POLICIES:

Meal purchases are reimbursable only for out of town travel. Non-meal food/drink costs (e.g. snacks, coffee, soda, and candy) and alcoholic beverage purchases **will not be reimbursed**:

1. Travelers may spend up to the following amounts² for each meal that is reasonably required to be purchased as a direct result of travel:

² Note that these are maximum values and not guaranteed amounts per meal or per day (i.e. travelers may not request reimbursement for a single \$32.50 meal for a day of travel) – employees will be reimbursed only for actual costs. When submitting reimbursements for meals that were greater than the maximum value for that meal, employees must manually change the reimbursement request to reflect the maximum amount for that meal.



- Breakfast: \$7.50
 - Lunch: \$10.00
 - Dinner: \$15.00.
2. If a meal is served on the plane, included in a conference registration fee, or built into the standard hotel room rate, a meal reimbursement may not be claimed.
 3. If an employee believes he or she needs to make a meal purchase for him/herself and/or for non-Match individuals (i.e. clients and donors), that employee should attempt to keep the total meal cost to a reasonable amount. For such client or donor meals, no more than two alcoholic beverages per attendee may be purchased. The employee must adhere to all other meal policies.