Simons Foundation – Simons Symposia
Travel and Expense Reimbursement Policy
Simons Symposia Travel Policy

Purpose
This policy details those logistical and administrative aspects of the Simons Symposia. Participants who incur expenses while traveling to and attending the Simons Symposia at the Schloss Elmau Luxury Resort and Hideaway in Germany are encouraged to review this document.

In general, Simons Foundation reimburses participants for authorized, reasonable and documented meeting expenses. These expenses include transportation, lodging, meals and other necessary services incurred while participating in the Simons Symposia. The foundation relies on symposia participants to make reasonable, cost effective judgments when incurring expenses.

The foundation requires that all expense reports to be filed with original documentation within thirty (30) days of the charges being incurred. The foundation does not reimburse any excessive, tardy, undocumented or unreasonable expenses.

Participation
By agreeing to participate in the Simons Symposium, invitees confirm that they are available for the entire meeting week. Scientific activities will take place Monday through Friday, thus participants should arrive the Sunday before the meeting and depart on the Saturday after the meeting. No accommodations will be made for partial participation.

Guests
It is the foundation’s policy to discourage spouses, families or others from joining participants during the meeting. Participants who choose to invite guests to come before or stay on after the meeting do so at their own expense. Simons Foundation will not cover expenses associated with such extensions.

Air Travel
Simons Foundation will arrange your air travel to and from Germany. The destination airports are Munich International Airport (MUC) or Innsbruck (INN) Airport depending on the best available route. Protravel is the official travel agency of the foundation and all air travel to and from the symposium must be booked through them. Any other arrangement must be pre-approved by Meghan Fazzi (mfazzi@simonsfoundation.org).

Susan Gatewood is the foundation’s Protravel representative and will be provided with your name and contact information. To initiate the booking process you will be asked to register for the symposium online. A copy of your registration information will be sent to Susan Gatewood who will then contact you with a flight itinerary.

ProTravel International, Inc.
Susan Gatewood
Business class may be booked for flights that exceed five hours in duration—the foundation will only bear the cost of coach class flights on shorter routes. Participants who elect to upgrade to a higher class of service outside of these guidelines may do so at their own expense.

Documentation for reimbursement of travel not booked through Simons Foundation travel agent as above must include the original airline passenger receipt and boarding passes. A trip itinerary is not acceptable documentation for reimbursement. If the original airline passenger receipt is not available, an explanation should be submitted with expense reports.

Should personal travel needs require travel to a destination other than an originating departure point the foundation will reimburse participants for the most economical round-trip fare equivalent between the original departure destination and MUC or INN. Supporting documentation for flight prices must be submitted with expense reports.

Travel paid with frequent flyer miles cannot be reimbursed. The foundation pays for a maximum of two checked bags per person per flight.

Car Rental
The foundation discourages car rentals. If you find you need to rent a car, please contact Meghan Fazzi prior to booking.

Transportation to and from Your Home Airport
Simons Foundation urges participants to choose the most economical option when traveling to and from your home airport. Some options include public transportation, taxi, car service or personal automobile, whichever is less.

Mileage Reimbursement
Mileage will be reimbursed for use of a personal automobile for transport to and from one’s home airport. A printout from Google Maps or similar application should be included in your expense report as supporting documentation for destination distance. The mileage allowance follows IRS policy, which, as of 2015, is $0.575/mile.

Documented parking and toll expenses are reimbursable expenses.

Train
The foundation requires that all train tickets be booked Coach class with the exception of Amtrak Acela trains where Business class is acceptable. Participants electing to upgrade to a
higher class of service may do so at their own personal expense. Train reservations must be made through Protravel.

**International Ground Travel**
The foundation will reimburse all reasonable ground transportation expenses to and from the airport when traveling to the Simons Symposia. Documented transportation costs will be reimbursed with an original receipt.

**Between the Airport and Schloss Elmau**
Transportation from the airport to the resort will be arranged directly by the foundation. Meghan Fazzi must preapprove any ground transportation outside this arrangement.

**Lodging and Dining at Schloss Elmau**
The foundation will arrange standard accommodations for all symposia participants at the resort for a total of six nights with arrival on Sunday and departure on Saturday. All meals Monday through Friday will be arranged and paid for directly by the foundation. On the days of arrival and departure (Sunday & Saturday), participants are free to dine on their own.

Room and hotel charges beyond the basic lodging and meal costs included in the package are not reimbursable.

**Incidentals**
Upon check-in at Schloss Elmau, you will be asked to provide a credit card to cover any incidentals accrued while attending the symposium.

All of the following charges are covered directly by the Simons Foundation:

- Airline tickets
- Airport transfers
- Resort accommodations for 6 nights
- All group meals and non-alcoholic beverages while onsite at the resort
- Arrival and Departure Meals
- Gratuities and maid service

All of the following charges are NOT covered directly by the Simons Foundation:

- Gift shop purchases
- Additional and resort activities apart from the group excursion
- Taxis in Germany
- Items purchased in Germany
- Alcoholic beverages not part of group dinners
- Mini bar
- Room Service outside arrival and departure meals
Day of Travel Dining
On days when participants are traveling to or from symposia, the foundation will reimburse up to US $50 per day for meals. The meal detail receipt must be submitted for reimbursement as well as the credit card receipt if paying by credit card.

Expense Reporting
Original receipts are required for all expenses not paid directly by the foundation. In the event a receipt is lost and an original receipt is not available, a written statement should be submitted with the expense report stating that the original receipt is not available and that the reimbursement has not been previously received. The written statement should include the amount, date, business purpose, and that amounts stated were truly incurred.

The foundation requires participants to complete Simons Foundation Reimbursement Expense Report. Only expenses claimed on the official report are reimbursed. The Reimbursement Expense Report can be obtained from Meghan Fazzi (mfazzi@simonsfoundation.org). Expense reports must be submitted within 60 days of the date of the expense.