



PMI Volunteer Travel & Expense Policy

Policy Level: 3

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Accountable:

President and CEO

Responsible:

Chief Financial Officer

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1. Purpose

It is PMI's practice to reimburse PMI Volunteers for their reasonable and approved expenses incurred in connection with travel and other business conducted on behalf of PMI, subject to guidelines and procedures set for in this policy, as well as any applicable policies and procedures shared by any PMI Volunteer Engagement Liaison. The purpose of this policy is to provide clear guidelines for PMI-related business travel and expenses to ensure only ordinary, necessary, and reasonable travel and expenses are covered or reimbursed by PMI.

2. Travel & Expense Policy

It is a priority of PMI to support the safety and preparedness of individuals incurring PMI related business travel and expenses, and to ensure that such travel and expenses are consistent with the mission, vision and values of the organization. PMI will cover the cost of ordinary, necessary, and reasonable business travel and expenses, provided that such expenses are properly supported, submitted, approved on a timely basis, and adhere to PMI policy as well as to any applicable federal laws and regulations. PMI will not reimburse travel and other expenses that are deemed to be unreasonable or extravagant based on the facts and circumstances of the situation.

This policy has been developed to provide individuals conducting PMI business with a reasonable level of service and comfort at the lowest possible cost, clarify individual responsibilities for adherence to established guidelines, and maximize PMI's ability to negotiate discounted rates with preferred suppliers and reduce overall expenses.

All PMI-related events or meetings that require the rental of a venue and the use of services such as audio/visual rentals, catering and group transportation fall outside of the scope of this policy and must be coordinated through the Events Department in conjunction with the Procurement Department. These departments will work to secure reasonable accommodations and appropriate preferred vendors to provide necessary technology, audio/visual, catering, and group transportation services as well as any other necessary items/services. All approved and appropriate meeting related expenses should be billed directly to PMI.

2.1 Travel Approvals

Volunteers must be approved to travel on PMI-business, and they may receive approval via one of two means. The first way is when a volunteer is invited to attend a PMI-organized event and is sent an Official Meeting Announcement (OMA). The second way is through an approved PMI travel request for travel not related to an official PMI meeting. The following provides details on each.

2.1.1 Travel initiated by a PMI Official Meeting Announcement (OMA)

Volunteers may book their travel only after an official meeting announcement (OMA) has been approved by PMI's CEO and shared with them through their staff liaison. Volunteers must provide the meeting code number contained in the OMA to PMI's contracted travel agency (CTA) who will confirm the volunteer is on the authorized attendee list for the meeting prior to making any travel arrangements. If a volunteer name does not appear on the list, CTA will take the volunteer's reservation but will not process it until the PMI meeting host has given authorization.

2.1.2 Travel not initiated by an Official Meeting Announcement (OMA)

Volunteer travel for PMI-related business not associated with a group meeting will not have an OMA and the following process must be followed:

- The PMI host / Volunteer Engagement Liaison (VEL) will initiate and administer the approval process for such travel by requesting approval from the Executive Sponsor or Region Managing Director.
- The Volunteer must receive approval from the inviting PMI host / VEL prior to contacting CTA.
- The PMI host / VEL is responsible for notifying CTA in advance to authorize the travel and provide the appropriate account codes.
- The PMI host / VEL is responsible for providing the volunteer with the Release of Liability and Assumption of Risk waiver (see section 6 on Related Documents) for volunteer review and signature.
- Once approval is attained, the traveling volunteer must review and sign the Release of Liability and Assumption of Risk waiver and submit it to the VEL prior to booking travel.
- The VEL must review the waiver to ensure it is complete and forward the completed and signed Release of Liability and Assumption of Risk waiver to volunteer@pmi.org for record keeping. In addition, the VEL is required to maintain a copy in their files.
- The Volunteer may then book travel through CTA.

2.2 Travel Profile

Each traveler is responsible for creating and managing a travel profile in Concur. There should only be one travel profile per person. It is the responsibility of the traveler to keep their profile up to date, including their current email, passport and visa information. The travel profile may also include information on dietary restrictions, if applicable. If a traveler has an existing travel profile, they may update or change their profile through Concur.

For assistance managing travel profiles, please contact ConcurHelpDesk@pmi.org.

2.3 Making Travel Arrangements

All PMI-related travel arrangements including air, train and rental car (if needed) must be made through PMI's CTA and charged to PMI's corporate credit card unless otherwise stated. Travel should be secured through CTA via Concur, when access allows. Otherwise, it should be secured through PMI's CTA. The CTA will first utilize any PMI award points available to book travel whenever possible.

Travelers living outside the continental United States, Canada or Mexico may be required to book travel with a local source to adhere to government regulations and/or to secure lower fares. If this is the case, the traveler is required to document the date, flight numbers, cost of lower fare and source to either PMI's CTA or their group travel department. If CTA is not able to match the fare, the traveler may book independently and seek reimbursement through PMI's expense report process. Travelers must advise CTA and the appropriate PMI representative of the booked travel itinerary to document arrival and departure, secure hotel room reservations, and/or ground transportation when applicable. Supporting documentation from CTA indicating maximum reimbursement allowable based on comparable flights CTA could offer must be attached to the expense report.

Travelers choosing to combine PMI business travel with personal vacation/business must book their travel using the CTA. Travelers wishing to make travel arrangements through CTA for a family member, partner or other accompanying person are individually responsible for any additional travel costs. PMI will not reimburse for any expense incurred for or by the family member, partner or accompanying person. Any charges not covered by PMI will be charged to the individual's personal credit card number.

The individual will need to submit approved PMI-related charges, with receipts, to PMI for reimbursement.

PMI's CTA is located near Philadelphia, USA. They can be reached at +1-610-355-1687 Monday through Friday, 8:00 am to 4:30 pm Eastern Time and may be reached by telephone at, or +1-610-296-9300 after regular hours. CTA can also be reached via email at pmitravel@worldtravelinc.com.

The [Concur travel portal](#) is available 24 hours a day, 7 days per week. Concur Online Travel Support through CTA is available via e-mail at onlinehelp@worldtravelinc.com or via telephone from 8:00 am-8:00 pm Eastern Time at +1-800-221-4730.

2.4 Travel Arrangement Guidelines

PMI requires that, wherever possible, practical and applicable, all travel plans be made at least twenty-one (21) days in advance via Concur in order to take advantage of airline fare discounts and hotel early booking rates. Exceptions to the 21-day advance request will be made if a meeting is scheduled less than 21 days in advance of a traveler's involvement. If the traveler is able to obtain a lower fare from another source, the traveler must document the date, flight and/or train numbers, cost of lower fare and source to PMI's CTA. If the lower fare cannot be matched, the traveler may book elsewhere.

Travelers must identify themselves as a PMI traveler and indicate the nature of the relationship to PMI when contacting CTA.

All travel arrangements must be made with a return date in mind; no open-ended return flight tickets will be permitted. If the return date is not confirmed, flights should be booked initially with an approximate return date, and if necessary, changed as soon as the actual return date and time are known.

Air travel will be booked in the lowest applicable coach class. Travelers are required to consider all alternatives as presented by CTA. These include different carriers, airports, and connecting flights within a three-hour window that result in a savings of at least \$150 United States Dollar (USD) per round trip for domestic travel and within five-hour window that result in a savings of at least \$400USD for international travel. Personal miles or coupons can be used to upgrade to business/first class, or traveler may opt to pay personally for the price difference between coach and business/first class. CTA will request a personal credit card from the traveler at the time of booking to charge the difference in fare.

Train travel is booked at the lowest fare available, unless there is a manager approved bona fide business need. For clarification, Acela is considered business class for rail.

Rental cars should only be used in conjunction with overnight travel when use of a rental vehicle is the most cost-effective option as compared to taxi, rideshare (ie. Uber, Lyft), shuttle, or other forms of transportation. Rental cars are limited to classes up to mid-sized (economy/compact preferred) unless four or more people are traveling together to the same destination and a larger rental provides a greater value. When renting a car, the traveler should obtain insurance through the rental company and expense the costs as part of their expense reimbursement.

Exceptions to this policy for medical reasons should be approved by PMI Talent representative and communicated to CTA. To request a medical exception, travelers should provide a physician's letter stating the required need directly to PMI Talent. PMI representatives should not request medical or diagnosis information from the traveler.

2.5 Itinerary Confirmation, Changes, Cancellations, and Unused Tickets

Travelers are required to confirm the accuracy of their CTA itinerary within twenty-four (24) hours of receipt to ensure that all flights, trains, lodging arrangements, and possible car rentals are correct. If a discrepancy is found, the traveler should contact PMI's CTA directly within the stated 24 hours to void any tickets and reservations without a penalty fee.

Any changes to an itinerary due to a traveler's desire to return earlier than ticketed will be the responsibility of the traveler. PMI will not be responsible for change fees exceeding \$50, except in cases of manager-approved bona fide business need.

If a traveler needs to cancel a trip, he/she must contact CTA immediately. It is the responsibility of the traveler to make certain that all airline, train, hotel, car rental or services are canceled.

All unused airline and train tickets must be accounted for and returned to PMI's CTA for refund or re-ticketing. The window for returning used tickets is five (5) business days, after which time the costs of the unused ticket will be invoiced to the traveler, assuming other use.

2.6 Visas and Vaccinations

Visas and vaccinations required in connection with PMI travel will be reimbursed by PMI. Preferred vendor VisaHQ or similarly cost-effective selection should be used for visas. Normal passport charges and/or renewals will not be reimbursed by PMI. In the event that a visa needs to be expedited for purpose of PMI travel and/or at PMI's request, PMI will reimburse the cost to expedite the application.

2.7 Travel Insurance

When traveling on PMI business outside of the traveler's home country, a Travel Accident policy is available to help the traveler obtain proper medical care in the event they are injured due to an accident. This is not a comprehensive medical policy and only provides coverage for injuries resulting from an accident. It does not provide general illness coverage. In cases where personal travel is combined with business travel, this policy coverage only applies to the days related to PMI Business travel. For more information, please contact your VEL.

2.8 Incentive Programs

All points earned under frequent traveler programs, other incentive plans, or affinity cards while traveling on PMI-related business are retained by the individual traveling on PMI business. Travelers may not make travel arrangements to maximize their points if additional costs are incurred, or non-productive time or additional destinations are added. PMI will not reimburse any fees associated with an affinity incentive program.

3. Additional Volunteer Travel Policies

The following additional travel policies apply to PMI volunteers. These guidelines are in addition to the general travel policy and prevail over the general travel policy in the event of conflicting guidelines.

The PMI representative to notify of travel plans is the specific staff VEL assigned to the volunteer. Exceptions to Travel Arrangement Guidelines not already addressed in this policy may be granted by the CEO or CFO on a case-by-case basis.

Mileage reimbursement will be provided at the current IRS mileage rate for miles in service to charitable organizations. Please convert kilometers to miles for calculation purposes.

Any questions on travel policies or reimbursements of expenses arising during the course of business which are not answered by this policy should be directed to the volunteer's VEL.

4. Expense Reimbursement Policy

PMI requires that all expense reports be completed and submitted to PMI within four weeks of an activity for reimbursement. Expense reports submitted three months or later than the date incurred will not be reimbursed.

Expense reimbursements will be submitted via the Concur Travel and Expense online portal. Receipts must be electronically attached to all expenses. Exceptions may be made for amounts under \$25 for which a receipt could not be obtained (such as cash tips). Expense reports will not be paid without proper approvals. It is the responsibility of the approver to ensure that valid supporting documentation is included and the request for reimbursement complies with all aspects of this policy. Expense reports are paid weekly on Wednesdays for all expense reports with *full* approval(s) by COB the previous Friday.

4.1 Direct Deposit and Wire Transfers

4.1.1 ACH Funds Transfer Form

PMI will pay all U.S. domestic expense report reimbursements via ACH in USD. Individuals must complete and submit an ACH Funds Transfer form or an International ACH Funds Transfer form (refer to section 6, Related Documents).

4.1.2. For any additions or edits to Volunteer's banking information, please contact your Volunteer Engagement Liaison. International Wire Transfer Form

Reimbursements outside the U.S. will be made via international ACH or wire transfer in the individual's local currency unless not supported by Wells Fargo, PMI's banking institution, in which case funds will be wired in USD. For such reimbursements, an International Wire Transfer form must be completed (refer to section 6, Related Documents). The wire transfer or international ACH will credit the reimbursement funds directly to the individual's international bank account.

Upon completion, the form should be submitted directly to accounts.payable@pmi.org for further processing. For any additions or edits to Volunteer's banking information, please contact your Volunteer Engagement Liaison.

4.2 Expense Reimbursements

PMI will reimburse travelers for business related expenses supported by appropriate documentation/support as noted in section 4.

4.2.1 Reimbursable Expenses

Reimbursable expenses include:

Transportation Expenses:

- Air and rail travel as outlined in section 2.3 and 2.4
- Car rental fees as outlined in section 2.3 and 2.4
- Traveler's first baggage fee

- Second baggage fee or excess weight fee, only in cases of bona fide business need, provided that the specific business need is included in the relevant expense report.
- Mileage costs when using a personal vehicle on PMI travel. Mileage is reimbursed at a prescribed rate identified by the United States Internal Revenue Service (IRS). See section 3 for more details on type of IRS rate applicable.
- Gas/Fuel costs for refueling of a rental car (should be done at a gas station other than the rental agency itself to reduce cost). Gas costs will not be reimbursed when using a personal vehicle as this cost is covered by the mileage allowance that should be requested instead.
- Taxis, rideshare services such as Uber or Lyft (lowest available fare; Premier, Black or similar upgrades are not allowed) airport/hotel shuttles, tolls and parking costs.
- Airport/train station parking
- Tips/gratuities will be reimbursed for reasonable and customary gratuities for taxi, rideshare services, shuttle drivers and valet services. Receipts should be provided when available.
- Necessities (up to \$250) purchased due to lost/delayed luggage. When submitting for reimbursement, the traveler must include a copy of the claim filed with the airline. Should the airline reimburse the traveler, the traveler must return any funds reimbursed by PMI.
- Loss/theft of personal funds or property up to \$500, subject to submission of a copy of the corresponding police report.

Communications Expenses:

- In-flight Wi-Fi access (when available) as well as Wi-Fi/wired internet access in hotel room
- In-room telephone usage (reasonable business-related calls whether local or long distance) as well as reasonable charges for travelers to keep in touch with their families/partners and conduct urgent personal business.
- Telephone calls made on personal cell phones or from the traveler's home telephone for PMI business will be reimbursed when supported with appropriate documentation of length of call, charge for call and business purpose of call.

Lodging Expenses:

- Standard accommodations, provided that the room cost should not exceed \$350 per night. The limit may vary based on the geographic location, but amounts in excess of \$350 per night should be approved in advance by the CFO. As used in this section, standard accommodations shall mean a standard business room inclusive of preferred bed (e.g., desk, bed, in-room private bathroom, access to Wi-Fi).
- Notwithstanding any of the foregoing in this section, the cost of the lodging must be ordinary, necessary, and reasonable and should not be extravagant based on the geographic location.

- Tips/gratuities will be reimbursed for reasonable and customary gratuities for hotel bellman/porter and hotel housekeeping. Receipts should be provided when available.
- Any lodging expenses charged to the room must be supported by detailed receipts.

Meal Expenses:

- Personal meal costs (excluding events where PMI is providing meals). Meals should not total more than \$100 per day. Itemized receipts must be provided for reimbursement. Meal reimbursement requests for more than one (1) guest will require a listing of attendees, their organizations, and the purpose of meal.
- Alcohol costs are generally reimbursable as long as they are ordinary, necessary and reasonable within the context of the specific PMI meeting. Travelers are expected to consume alcohol responsibly and in moderation. Itemized receipts with attendees must be submitted.
- Groceries purchased in lieu of meals due to dietary or religious restrictions will be reimbursed based on an itemized receipt.
- Tips/gratuities will be reimbursed for reasonable and customary gratuities for meals based on the geographic location. Receipts should be provided when available.

Other Expenses:

- Laundry/dry cleaning/suit pressing incurred during business travel
- Office services (i.e. faxes, copies, overnight delivery/postage) when not able to secure for free through hotel/meeting venue
- Currency conversion costs
- Additional items as required by individual contractual obligations, subject to approval by the individual's PMI representative (VEL for volunteers).
- All of the above require itemized receipts even if included in the hotel folio.

4.2.2. Non-reimbursable Expenses:

Non-reimbursable expenses include, but are not limited to:

Transportation Expenses:

- Upgrade/additional fare costs for purchase of preferred seats such as exit row, bulkhead or specific location seats
- Travel insurance provided by airlines/rail providers.
- Car services (Rideshare such as Uber, Lyft should be utilized using lowest available fare; Premier, Black or similar upgrades are not allowed. Other safe, economically appropriate options may also be considered.)
- Affinity/Rewards programs fees
- Affinity/Rewards program points/miles redeemed to book PMI business travel

- Lounge access fees
- Satellite radio or other unnecessary options when renting a vehicle
- Parking tickets, moving violations and any other traffic-related fines
- Auto repairs for personal vehicles
- Cost differential on premium or luxury car rentals
- Avoidable “no-show” charges for airline/rail, hotel or car rentals

Entertainment Expenses:

- Sightseeing, movies, theater events, and sporting events
- Gifts

Lodging Expenses:

- Suites, penthouses, and other luxury accommodations
- Hotel gym or hotel spa access/usage fees
- Mini-bar charges

Meal Expenses:

- Meals are not reimbursable at PMI events where meals are provided, except in cases to accommodate dietary restrictions or in cases where networking obligations prevent consumption of provided meals.

Other Expenses:

- Toiletries and personal grooming items such as toothpaste, toothbrushes, mouth wash and other personal grooming items. This also includes barber, hair stylist, shoeshines, and other grooming costs.
- Neck pillows, blankets, and other travel comfort items
- Books, magazines, newspapers and any other personal reading materials
- Credit card penalties and interest charges
- Babysitting, childcare, and pet boarding expenses
- Any expenses incurred by family members/partner accompanying traveler
- Expenses related to personal or vacation days while on PMI business trip
- Briefcase and/or luggage purchases (including laptop bags)
- Prescriptions, over-the-counter medications, or other medical expenses
- Personal clothing or clothing accessories, unless due to lost or delayed luggage (see above regarding when reimbursement would be applicable)
- Cell phone chargers, cases, batteries, headsets, and other phone accessories
- Charitable donations
- Adult entertainment in any form will not be reimbursed under any circumstances

5. Policy Distribution

Internal for Action and Awareness:

- President and CEO
- Chief Financial Officer
- Vice President, Finance
- PMI's CTA
- All PMI Staff
- All PMI Volunteers

6. Related Documents

Related procedures, forms, and other supporting documents enforce, maintain, and verify policy compliance. The procedures and forms below support this policy.

Volunteers wishing to access any of the documents below should contact their staff Volunteer Engagement Liaison.

Staff Volunteer Engagement Liaisons should access the documents below via the OnePMI Volunteer Engagement Resource Hub, specifically the Governance Resources section of the [Resources and Tools](#) page.

Document Name	Document Type (Procedure, Form, User Guide, etc.)
ACH Funds Transfer Form	Form
Concur Travel and Expense	Online Portal
International Wire Transfer Form	Form
Release of Liability and Assumption of Risk	Waiver

7. Revision History

This policy is to be reviewed for updates on an annual basis. Changes to this policy are made as necessary under the direction of the preparers and approvers. The change log describes new topics and other changes.

Action (Creation, Revision, Review)	Effective Date	Changes/Approvals
Creation	June 2000	
Revision	April 2007	Ownership and title changes due to organization restructure
Revision	March 2010	Transferred ownership from Events to Finance and Administration, made minor edits to verbiage, and drafted in updated branded template
Revision	January 2015	Revised policy to be more comprehensive and include information on expense reimbursement; transferred to new policy template
Revision	October 2019	Policy updated to standardize general PMI travel policies. CTA hours and contact info updated. Section added for volunteer-specific provisions. Edits made to move verbiage to appropriate section(s), to provide additional details, and to provide additional clarity.
Revision	February 2022	Policy updated to include travel booking guidelines for travel not initiated by an Official Meeting Announcement.
Revision	October 2025	Policy updated to align with accommodations in Board T&E Policy (updated Oct 2024)

8. Glossary

This policy uses the following specific terms, acronyms, and abbreviations:

Term	Definition
ACH	Automated Clearing House is an electronic network for financial transactions in the United States.
VEL	Volunteer Engagement Liaison
CTA	Refers to PMI's "contracted travel agency"