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1. Purpose

This document establishes policies guiding the direct payment and reimbursement of travel and related expenses incurred during the conduct of PMI-related business. It is PMI’s policy to cover and reimburse all volunteers for ordinary, necessary and reasonable travel expenses that are directly connected with or pertaining to the transaction of PMI-related business. Volunteers are expected to exercise prudent business and personal judgment regarding expenses covered by this policy.

2. Policy Statement

Prior to contacting PMI’s travel consultant, volunteers must create a PMI travel profile. The PMI meeting host will provide the link and instructions to create the profile when he or she sends the Official Meeting Announcement. If the volunteer has an existing PMI travel profile, the same link can be used to update or change anything in the profile. There should be only one travel profile per person.

The PMI meeting host will provide the volunteer with a “meeting code” or “cost code” which will be specific to the particular meeting. The volunteer will be required to give the code to PMI’s travel consultant when they request travel arrangements.

All travel arrangements including air, train and rental car must be booked through PMI’s In-house Travel Consultant. (Note: An exception to this procedure may be granted if the PMI meeting attendee is able to obtain a lower fare from another source. If this is the case, the PMI meeting attendee must document the date, flight numbers, cost of lower fare and source to PMI’s In-house Travel Consultant and copy PMI’s Events Department. If PMI’s In-house Travel Consultant is not able to match the fare, the PMI meeting attendee may book elsewhere.)

Those volunteers choosing to combine PMI business travel with personal vacation/business travel must also utilize PMI’s In-house Travel Consultant. In this instance, PMI’s In-house Travel Consultant will request the volunteer’s personal credit card number. PMI’s In-house Travel Consultant will provide the volunteer with the PMI-related charges to be submitted to PMI for reimbursement.

All travel inquiries for meetings of approximately 50 attendees or less should be directed to PMI’s In-house Travel Consultant:

Phone: +610-355-1687/direct line
       +610-356-4600 x 1087/PMI Switchboard

E-mail: travel@pmi.org

Hours: Monday - Friday, 8:30 a.m. - 5:00 p.m. (US Eastern Time)

All travel inquiries for meetings of approximately 50 or more attendees are handled by World Travel’s Group department:

Phone: +800-867-2970/direct line – Group Department
       +610-327-9000 x 5914/World Travel switchboard

E-mail: groupdepartment@worldtravelinc.com

Hours: Monday-Friday, 8:30am – 5:00pm Eastern time
The PMI Meeting Host will instruct volunteers which office to contact when meeting announcement is sent.

In case of emergencies such as flight cancellations, World Travel’s After Hours department can be contacted:

+800-874-6700 or +610-296-9300

Hours: 24hours/7 days a week including holidays

Please make every attempt to finalize your travel needs at least 21 days in advance to secure the lowest airfare.

Volunteers are expected to travel in the lowest applicable Coach Class for all flights. PMI’s In-house Travel Consultant is mandated to offer the lowest airfare available to volunteers traveling on PMI-related business. When attending a PMI meeting, travelers are required to contact the designated travel agency at least 21 days prior to book your flight or immediately upon receiving the “official meeting announcement”. You may be required to make a connection to travel; however, only one connection per one-way travel is expected. The use of a connecting flight is required under this procedure only if the savings to PMI is 25% or greater.

PMI will reimburse the traveler for a Saturday night “stay over” at a meeting location, if the discounted air fare plus the costs of another night’s stay, meals and other related expenses is less than the costs of arriving or departing at the normal scheduled meeting date. Prior approval from the meeting host must be given to the Events Manager in advance.

When contacting PMI’s In-house Travel Consultant, please identify yourself as a PMI volunteer traveling on PMI-related business. Travel arrangements will not be made through PMI’s In-house Travel Consultant agency prior to the volunteer’s receipt of the official meeting announcement. The official meeting announcement contains the PMI meeting code number that is required by volunteers in order to request travel information. You should receive an electronic response from PMI’s In-house Travel Consultant within two working days.

A list of attendees authorized to travel on PMI-related business must be given to PMI’s In-house Travel Consultant in advance by the meeting host. If for some reason your name does not appear on the list, the travel consultant will take your reservation but will not process it until the PMI meeting host has given authorization.

Any individual traveling on PMI-related business that is not associated with a group meeting must receive approval from the inviting PMI host prior to the ticketing. The PMI host is responsible for notifying PMI’s In-house Travel Consultant in advance to provide authorization, approval and cost code.

All unused airline tickets must be accounted for and returned to PMI’s In-house Travel Consultant for refund or re-ticketing. The window for returning unused tickets is 5 working days, after which time the costs of the unused ticket will be invoiced to you, assuming other use.

PMI’s In-house Travel Consultant is mandated to offer the lowest fare available when train travel is required.

Cars must be rented through PMI’s In-house Travel Consultant, but only when other means of transportation are unavailable, more costly or impractical. In this instance, the
individual’s personal credit card is required. If considered a reimbursable expense, the individual must submit a PMI Expense Report with complete documentation.

All rentals should be for mid-size or smaller, unless four or more people are traveling together to the same destination and a larger rental provides value.

In the event that a volunteer needs to cancel a trip, the traveler must contact PMI’s in house travel consultant or World Travel immediately. If it is outside of business hours, World Travel’s After Hours department must be contacted at +610-296-9300 or +800-874-6700. It is the responsibility of the traveler to make certain that all airline, train, hotel, car and limo services are canceled. If World Travel cannot be reached, the traveler must contact the airline, train, PMI meeting host, as soon as possible.

If the airline ticket is nonrefundable, a credit will be issued in your name for future PMI travel on that airline minus the exchange fees. The credit is good for travel up to one year after the ticket issue date. If the ticket is refundable, it will be refunded.

If a volunteer is delayed on his or her way to the airport and misses their flight, he/she must make sure that the airline is notified prior to the departure time or the unused ticket will have no value. The traveler should proceed to the airport and take the next available flight to his/her destination.

Personal cars may be used for PMI-related business travel when other transportation is unavailable or not economical. The use of personal cars for business will be reimbursed at the standard rate prescribed by PMI. (Refer to PMI Expense Report).

Travel expenses for a spouse/guest are not reimbursable as a business expense. If a volunteer is being accompanied by a spouse/guest and PMI is providing travel arrangements, the volunteer must provide a personal credit card to be charged for the travel arrangements made on behalf of the spouse/guest. PMI will assume responsibility for the volunteers housing costs only and will not exceed charges incurred above and beyond the single person room rate.

All points accrued by a frequent flyer or other incentive point affinity cards by a volunteer traveling on PMI-related business are theirs to keep. However, PMI travelers may not make travel arrangements to maximize their points when it costs more money, add non-productive time or link additional destinations to the trip. PMI will not pay any fees to support any affinity incentive program. Guest or spouse travel booked on a personal card will accrue to that individual and not to PMI.

All travel transactions provided by PMI’s In-house Travel Consultant for air, bus and train are billed directly to PMI (except where noted) and allocated to the appropriate program’s budget.

Exceptions to this travel policy may apply as a result of a PMI traveler’s existing medical condition, such as back injuries or medical emergencies. All requests must be submitted to and approved in writing by the Chief Executive Officer/Chief Executive Officer designee.
3. Policy Distribution
This policy applies to all PMI volunteers with the exception of the Board of Directors. This information will be distributed as needed to appropriate volunteers.

4. Related Documents

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5. Revision History

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

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