

Policy Manual for PMI Chapters

LAST UPDATE: OCTOBER 2023



The Policy Manual for the PMI Chapters will continue to experience revisions and updates in the coming weeks or months to align with PMI's evolving practices. The policies stated in this document are current as of the date indicated above. We kindly request that you refer to Section 1.2, titled "Policy Distribution and Updates," to access the most recent edition.

This edition serves as an update to the June 2021 version, featuring numerous minor edits for accuracy and style. We specifically wish to highlight significant additions and updates:

- PMI Cultural Values
- Chapter Cooperation Policy
- Chapters with Toastmasters Clubs
- SCRUM Alliance
- Authorized Training Partners (ATPs)
- Dissolution
- Chapter Membership Dues
- Chapter Conflict Management



Table of Contents

- 1. Welcome..... 10**
 - 1.1 Purpose of This Manual 10
 - 1.2 Policy Distribution and Updates 10
 - 1.3 Questions on Chapter Policies 10
- 2. Chapter Board and Leadership Policies..... 10**
 - 2.1 Definition of a Chapter Leader 10
 - 2.2 Purpose of the Chapter Board 10
 - 2.3 Alignment with PMI Culture Values 11
 - 2.4 Chapter Board Responsibilities 12
 - 2.4.1 Laws..... 12
 - 2.4.2 Articles, Bylaws, and Charter 12
 - 2.4.3 Tax Filings 12
 - 2.4.4 Records Management 12
 - 2.4.5 Annual Report 12
 - 2.4.6 Policies and Procedures 12
 - 2.5 Adherence to Fiduciary Duties 12
 - 2.5.1 Duty of Care 12
 - 2.5.2 Duty of Loyalty 13
 - 2.5.3 Duty of Obedience 13
 - 2.5.4 Duty of Integrity 13
 - 2.5.5 Duty of Foresight..... 13
 - 2.6 Chapter Leader Residence Policy..... 13
 - 2.7 Chapter Election Policies 13
 - 2.7.1 Nomination and Election Policy Requirements 13
 - 2.7.2 Nominating Committee 13
 - 2.7.3 Maintenance of Officer Listings 14
 - 2.7.4 Use of Electronic Voting..... 14
 - 2.8 References 14
- 3. Chapter Charter Policies 14**
 - 3.1 PMI Chapter Charter Agreement..... 14
 - 3.1.1 Authority and Responsibility..... 14



- 3.1.2 Agreement Approval 15
- 3.1.3 Awareness..... 15
- 3.2 Chapters with Branches..... 15
- 3.3 Chapter Reorganization..... 15
- 3.4 Chapter Services..... 15
 - 3.4.1 Required Services..... 15
 - 3.4.2 Recommended Services..... 16
 - 3.4.3 Optional Services 16
- 3.5 Chapter Charter Renewal 16
 - 3.5.1 Purpose 16
 - 3.5.2 Charter Renewal Deadline 16
 - 3.5.3 Minimum Performance Requirements 16
 - 3.5.4 Charter Renewal Compliance Review 17
 - 3.5.5 Charter Renewal Policy Compliance 18
- 3.6 Annual Planning Collection..... 18
- 3.7 References 19
- 4. Chapter Management Policies 20**
- 4.1 Incorporation Policy 20
 - 4.1.1 Considerations for Incorporation..... 20
 - 4.1.2 Proof of Renewal of Incorporation or Registration 21
- 4.2 Chapter Bylaws Policy 21
 - 4.2.1 Adherence to Bylaws Template 21
 - 4.2.2 Required Review of Chapter Bylaws 21
 - 4.2.3 Bylaws Review and Approval 22
- 4.3 Insurance Coverage Policies 22
 - 4.3.1 Insurance Coverage for PMI Chapters 22
 - 4.3.2 Chapters within the United States and Canada 23
 - 4.3.3 Chapters outside of the United States and Canada 23
 - 4.3.4 Local Primary Compulsory Coverage 23
 - 4.3.5 Certificate of Insurance 23
 - 4.3.6 Invoicing and Payment..... 24
- 4.4 Insurance Policy Coverage Descriptions..... 24
 - 4.4.1 Commercial General Liability Coverage (within the United States and Canada) 24



- 4.4.2 International Commercial General Liability (outside of the United States and Canada) 25
- 4.4.3 Professional Liability Coverage (Directors’ and Officers’ Liability) 25
- 4.4.4 Media Liability Coverage for All Chapters..... 25
- 4.4.5 Coverage Exclusions Applicable to All Insurance Policies 25
- 4.5 Tax Policies 26
 - 4.5.1 Chapters outside of the United States..... 26
 - 4.5.2 Chapters within the United States 26
 - 4.5.2.1 IRS Requirements for U.S.-Incorporated Chapters 26
 - 4.5.2.2 PMI Federal Group Tax Exemption 26
 - 4.5.2.3 Filing Federal Taxes 26
 - 4.5.2.4 Federal Tax-Form Filing Details..... 27
 - 4.5.2.5 Filing State Taxes..... 27
 - 4.5.2.6 Copies of Tax Filings Required by PMI 28
- 4.6 Information Security Policies 28
 - 4.6.1 Designated Chapter Security Role 28
 - 4.6.2 Chapter Security Policies..... 28
 - 4.6.3 Security Awareness 28
 - 4.6.4 Technology Asset Security 29
 - 4.6.5 Security Patch Management..... 29
 - 4.6.6 Virus and Malware Protections..... 29
 - 4.6.7 Backups 29
 - 4.6.8 Access Control..... 29
 - 4.6.9 Passwords 30
 - 4.6.10 Activity Monitoring 30
 - 4.6.11 Payment Data Protection..... 30
 - 4.6.12 Personal Data Protection 31
 - 4.6.13 Incident Reporting 31
 - 4.6.14 Regulatory Compliance 31
 - 4.6.15 Chapter Security Risk Assessment 31
 - 4.6.16 Chapter Vendor and Third-Party Security..... 31
- 4.7 Chapter Alliance and Collaboration Policies 31
 - 4.7.1 PMI Chapter Toastmasters Club Policy 33
 - 4.7.2 Scrum Alliance..... 34



4.7.3. Academic Institutions – PMI Chapter Student Clubs 34

4.8 References 35

5. Chapter Identification Policies..... 36

5.1 Chapter Name Policy 36

 5.1.1 Determining a Chapter Name 36

 5.1.2 Chapter Name Approval..... 36

 5.1.3 Managing Chapter Name Conflicts 37

 5.1.4 Chapter Name Change Policy..... 37

5.2 Chapter Logo Policy 37

5.3 References 37

6. Chapter Membership Policies 38

6.1 Chapter Membership Eligibility 38

6.2 Chapter Use of PMI Membership Information and Data 38

6.3 Membership and Prospect Database Information Policy 38

6.4 Member Notice and Consent Regarding Use of Application Information..... 38

6.5 Appropriate Use of Membership Data 39

 6.5.1 Permitted Use of Membership Data with Prior Consent..... 39

 6.5.2 Membership Directory Disclaimer 39

6.6 Unpermitted Use of Membership Data 40

6.7 Adherence with Privacy Laws..... 40

6.8 Member List Exchanges among Chapters..... 40

6.9 Member List Exchanges among Other Organizations 40

6.10 Sale of Lists Prohibited 41

6.11 Ownership of Information..... 41

6.12 Confidential Information..... 41

6.13 Return of Confidential Information upon Dissolution..... 41

7. Chapter Dues Policies..... 42

7.1 Purpose of Chapter Dues 42

7.2 Setting Dues 42

7.3 Changing Dues 42

7.4 Collecting Dues..... 42

 7.4.1 Chapter Membership Requirements 43

 7.4.2 Renewals 43



- 7.4.3 Membership Expiration 43
- 7.4.4 Incorrect Processing of Chapter Membership 43
- 7.4.5 Membership Transfers..... 43
- 7.4.6 Membership Refunds in the Event of Member Resignations..... 43
- 7.5 Requirements for Dues Disbursals from PMI..... 43
 - 7.5.1 Automated Clearing House (ACH)..... 44
 - 7.5.2 Wire Transfers..... 44
 - 7.5.3 Accuracy of Account Information 44
- 7.6 Reconciling Dues Received 44
- 7.7 References..... 44
- 8. PMI Intellectual Property Policies..... 45**
 - 8.1 Brand Governance and Guidelines 45
 - 8.2 Use of PMI Logo and Development of Chapter Logo 45
 - 8.3 Use of PMI Trademarks 46
 - 8.3.1 Purpose of Trademarks 46
 - 8.3.2 List of PMI Marks and Trademark Definitions 46
 - 8.4 Guidelines for Use of PMI Marks by PMI Chapters..... 47
 - 8.4.1 Proper Use of PMI Trade or Service Marks..... 47
 - 8.4.2 Alterations of PMI Trade or Service Marks 47
 - 8.4.3 Proper Use of PMI Certification Marks 48
 - 8.4.4 Use in Conjunction with Third Parties..... 48
 - 8.4.5 Trademark Registration of Chapter Logo Prohibited..... 48
 - 8.5 Examples of Correct and Incorrect Usage of PMI Marks..... 48
 - 8.5.1 Proper Usage..... 48
 - 8.5.2 PMI Mark and Logo 49
 - 8.5.3 The PMI Talent Triangle® 50
 - 8.6 Attribution Statement..... 51
 - 8.7 PMI Certification Program Advertising Policy 51
 - 8.8 Use of PMI Copyrighted Materials 52
 - 8.8.1 Reproduction and Distribution of PMI Copyrighted Material 52
 - 8.8.1.1 Photocopies 52
 - 8.8.1.2 Reproduction of Periodicals in Chapter Publications 53
 - 8.8.1.3 Translation of Periodicals for Chapter Distribution 53



8.8.1.4	Reproduction of Materials from PMI Standards for Use in Other Noncommercial, Chapter Member Use Only Works.....	54
8.8.1.5	Third-Party Use Prohibited	54
8.8.2	Derivative Works.....	54
8.8.2.1	Definition	54
8.8.2.2	Internal Chapter Use	54
8.8.2.3	Use with General Public, Third Parties, or Commercially Sold Products	55
8.8.2.4	Copyright Notice	55
8.8.2.5	Licensed Translations.....	55
8.9	References.....	56
8.10	Intellectual Property Appendices.....	56
Appendix 1	Form for Assignment of Copyright.....	57
Appendix 2	Terms and Conditions for the Derivative Work License Agreement	58
Appendix 1	Form for Assignment of Copyright.....	63
Appendix 2	Terms and Conditions for the Derivative Work License Agreement	64
9.	Chapter Website and Social Media Policies	69
9.1	Chapter Website Hosting, Naming, and Design	69
9.2	Chapter Website Development, Hosting, and Naming.....	69
9.2.1	Hosting with an Internet Service Provider (ISP).....	69
9.2.2	Domain Name Policies	69
9.2.2.1	Domain Name Selection.....	69
9.2.2.2	Domain Name Hosting	70
9.2.3	Chapter Website Logo Use.....	70
9.2.4	Chapter Website Web Content.....	70
9.3	Links to the PMI Home Page (PMI.org)	70
9.4	Social Media Policy	71
9.4.1	Adherence to PMI Social Media Guidelines.....	71
9.4.2	Consistent Use of PMI Identification	72
9.4.3	Promotion of Chapter Achievements and Newsworthy Activities	72
9.5	References	72
10.	Chapter Educational Activity Policies	73
10.1	Professional Development Units for Chapter Events	73
10.2	Chapter Responsibilities When Offering PDUs.....	73



10.3 Use of PMI Education Provider Portal and CCR System (CCRS)	73
10.3.1 Access to the Education Provider Portal.....	73
10.3.2 What PDU Activities Should Be Entered in the CCR System?	74
10.4 Corporate Training.....	74
10.5 Authorized Training Partner (ATP) Program.....	74
10.6 References.....	75
11. Chapter Benefits and Recognition Policies	75
11.1 Chapter of the Year Awards Program.....	75
11.2 Chapter Leadership Impact Award.....	76
11.3 Chapter Milestone Program.....	76
11.4 Discount on PMI Book Orders.....	77
11.4.1 Orders	78
11.4.2 Payment	78
11.4.3 Returns.....	78
11.5 Leadership Institute Meeting Registration Policy	78
11.6 Chapter Speaker Hub	78
11.7 Additional Support.....	79
11.8 References.....	79
12. Chapter Conflict Management Policies*	79
12.1 Purpose of the Conflict Management Program.....	79
12.2 Program Scope	79
12.4 Disputes Subject to Conflict Management	80
12.5 Conflict Management Oversight	80
12.6 References	80
13. Chapter Probation Policies	81
13.1 Purpose of Probation	81
13.2 Reasons for Probation.....	81
13.3 Probation Measures	81
13.4 Notification of Probation.....	82
13.5 Probation Outcomes	82
14. Chapter Dissolution Policies.....	83
14.1 Purpose of Chapter Dissolution	83
14.2 Process for Chapter Dissolution	83



1. Welcome

Welcome to your volunteer role as a PMI chapter leader! Volunteers are the lifeblood of PMI, providing services to both the profession and the Institute. Volunteers and effective volunteer partnerships with PMI team members are the best way to accomplish the Institute's goals and objectives. Thank you for your valuable time and contributions in furthering PMI's efforts to advance the practice, science, and profession of project management throughout the world.

1.1 Purpose of This Manual

This manual contains policies and resources that establish the rules, intentions, and directions for the governance of PMI chapters, including their branches, where applicable. Whether you are a newly elected or appointed officer or have been a long-time PMI chapter volunteer, this manual will assist you in your role as a PMI chapter leader.

1.2 Policy Distribution and Updates

The chapter president must ensure the chapter board of directors uses the most current version of this manual. New and updated policies, procedures, and guidelines are published on the PMI Chapter Collaboration Platform (CCP) > Documents > OLC > Chapter Governance & Policies folder. This document may also be located on the PMI Chapter Volunteer Resource Hub under the Governance header.

1.3 Questions on Chapter Policies

Contact the PMI Chapter Engagement Team at chaptersupport@pmi.org if you have any questions about the policies and references in this manual.

2. Chapter Board and Leadership Policies

2.1 Definition of a Chapter Leader

A chapter leader is a volunteer who is in a chapter-elected or appointed position.

2.2 Purpose of the Chapter Board

A chapter board consists of members described as a trustee, director, officer, or chairperson. The board has a fiduciary responsibility to the members who elected them. The board directs the chapter toward a sustainable future by adopting sound, ethical, and legal governance, and financial management policies to ensure the chapter can advance its vision and mission.



2.3 Alignment with PMI Culture Values

PMI is driven by a clear mission and an underlying set of Culture Values to drive how we volunteer, work, and collaborate. As a global organization, our Culture Values are guiding principles leveraging our diversity to form one united, vibrant, and successful organization.

Co-created by our community our Culture Values are By PMI For PMI and the language chosen represents our commitment to each other and to the project management community:

- *Make It Easy.* We are easy to deal with. When things slow us down, we find a better way. We prioritize the impact that matters most and take the most direct route to it.
- *Aim Higher.* We set the standard in top quality work to create the greatest impact for the PMI community. We lead the way by thinking long term and acting in the short term. We fearlessly take ownership of what we do, knowing every action counts.
- *Be Welcoming.* We create genuine belonging for all, because our differences make us stronger. We act with humanity, showing care, empathy and respect for others' needs. We assume good intent and seek to understand, not judge.
- *Embrace Curiosity.* We are always seeking ways to better serve the PMI community. We see challenges as opportunities to innovate and take them. We feel able to fail fast in order to get it right.
- *Together We Can.* We build deep, trusting relationships that help us work towards our mission together. We use our shared purpose to unite us as a community and drive us forward to create impact. We act in alignment with our global goals, while being empowered to deliver locally.

Each member of PMI is bound to the *PMI Code of Ethics and Professional Conduct*. Honesty, responsibility, respect, and fairness drive ethical conduct for the project management profession and chapter operations. Chapter leaders, personnel, and volunteers shall not engage in the following behaviors that do not align with PMI values:

- Slandering, ridiculing, or maligning a person or their family; persistent name-calling that is hurtful, insulting, or humiliating; using a person as the butt of jokes; abusive and offensive remarks
- Pushing, shoving, kicking, poking, tripping, assault or threat of physical assault, damage to a person's work area or property
- Nonverbal gestures that can convey threatening messages
- Socially or physically excluding or disregarding a person in chapter work-related activities



2.4 Chapter Board Responsibilities

The chapter board of directors must adhere to the following responsibilities to ensure the utmost integrity of the officers and the organization.

2.4.1 Laws

The chapter must adhere to local, state, or provincial, and federal laws surrounding not-for-profit organizations.

2.4.2 Articles, Bylaws, and Charter

The chapter must adhere to its Articles of Incorporation, chapter bylaws, and PMI Chapter Charter Agreement. Each of these documents has legal standing to regulate how the chapter carries out its business. Interested parties can challenge the chapter and its leaders on adherence to these governance documents. The chapter bylaws must offer the chapter board of directors enough flexibility to act on the members' behalf without having to ask for permission to act.

2.4.3 Tax Filings

The chapter must file in its own legal name and make accurate and timely reports of tax filings available to PMI. Independent audits of the chapter's financial records are also encouraged.

2.4.4 Records Management

The chapter must maintain accurate records related to its business affairs. If a chapter is challenged about any of its past or current practices or policies and cannot produce appropriate documentation to substantiate its defense, the chapter and its leaders may be at risk.

2.4.5 Annual Report

The chapter must publish an annual report stating its programs, officers, and financial condition.

2.4.6 Policies and Procedures

The chapter must develop and maintain operational policies and procedures, including the nomination, election, and financial management policies. Policies and procedures must be fair, equitably applied in every situation, and nondiscriminatory.

2.5 Adherence to Fiduciary Duties

PMI chapter leaders must adhere to fiduciary responsibilities to foster effective governance, set ethical leadership expectations, maintain accountability, and reduce liability exposure.

2.5.1 Duty of Care

A leader must exercise the same level of care over the chapter's business as a reasonable person would over their personal business. Chapter leaders have a duty to



be informed and to maintain confidentiality on matters that are brought to their attention.

2.5.2 Duty of Loyalty

A leader must act in an independent manner, avoid conflicts of interest, and uphold the interests of the members and the chapter above personal interests.

2.5.3 Duty of Obedience

The chapter board of directors must speak with one voice. A chapter leader must support board of director decisions and policies even if they personally disagree.

2.5.4 Duty of Integrity

A leader must follow all governance documents and chapter policies in an ethical and honest manner, including the PMI Code of Ethics and Professional Conduct and the Guidelines for Conduct of PMI Chapter Leaders.

2.5.5 Duty of Foresight

The chapter board of directors should build a consistent practice of foresight to act as responsible investors and champions and anticipate evolving mix of requirements required to thrive in the future.

2.6 Chapter Leader Residence Policy

Chapter leaders represent their communities and are expected to interact and engage with community members. Chapter leaders with voting rights must reside in the geographical area as defined in the Chapter's Charter Agreement of the chapter's operation for a minimum of six months each year. The chapter board may apply this policy to nonvoting volunteers at their discretion. Requests for exclusions to this policy can be made to the region's Chapter Engagement Team.

2.7 Chapter Election Policies

Annual elections are required and are an integral part of the chapter's existence. Chapter leaders must promote election of officers, onboard and train new board members, and monitor volunteer performance.

2.7.1 Nomination and Election Policy Requirements

The chapter board must have well-written nomination and election policies to promote and insure fair and timely elections.

2.7.2 Nominating Committee

The chapter board must approve a nominating committee to manage the nomination and election process. The nominating committee interviews and evaluates applicants in accordance with the chapter's policy for board opportunities and announces a slate of qualified candidates.



2.7.3 Maintenance of Officer Listings

It is the responsibility of the chapter president or chair to update officer listings within the PMI Component System (CS). Updates must occur promptly following annual elections to ensure continuity of leadership access to records within the CS.

2.7.4 Use of Electronic Voting

PMI provides the use of a no-cost electronic voting service to help chapters comply with all nomination and election policies and timelines. PMI strongly recommends that chapters use this resource. The chapter must contact the regional chapter engagement team at least four to six weeks in advance of the election to request the use of electronic voting.

2.8 References

REFERENCE	LOCATION
PMI Chapter Volunteer Resource Hub	https://www.pmi.org/leadership-central/chapter-volunteer-resources
Chapter Collaboration Platform (CCP)	https://ccp.pmi.org/#/welcome
PMI Code of Ethics and Professional Conduct	Available from www.PMI.org/CodeofEthics
PMI Strategic Plan	Volunteer Resource Hub > Essential Resources> PMI Strategy (https://www.pmi.org/leadership-central/chapter-volunteer-resources)
PMI Chapter Leader Guide: Financial Management of PMI Chapters	Volunteer Resource Hub > Essential Resources> Chapter Leaders Guides (https://www.pmi.org/leadership-central/chapter-volunteer-resources) Available from the PMI Marketing Portal (https://marketing.pmi.org/) > Media Library > Chapter Leaders Guide

3. Chapter Charter Policies

3.1 PMI Chapter Charter Agreement

The PMI Chapter Charter Agreement is a uniform, legally binding agreement defining the affiliation between PMI and the chapter. It defines the responsibilities and accountability that are expected of each party.

3.1.1 Authority and Responsibility

The PMI Chapter Charter Agreement incorporates into one document those organizational policies with which PMI chapters are required to comply. It provides



flexibility and adaptability for legal requirements from country to country. PMI chapters have the authority and responsibility to develop their own policies, programs, services, and initiatives in support of the overall mission and objectives of PMI.

3.1.2 Agreement Approval

Upon incorporation, PMI creates an official PMI Chapter Charter Agreement document, signed by the PMI President and Chief Executive Officer (CEO) via electronic signature tool. for the chapter to sign.

3.1.3 Awareness

All chapter board members must read and understand the terms of the PMI Chapter Charter Agreement to understand, and comply with, the requirements of their relationship with PMI.

3.2 Chapters with Branches

A chapter chartered as a chapter with branches receives a PMI Chapter Charter Agreement with specific language allowing for the creation of branches and outlining the authorities and limitations placed on branch operations and representation.

If branches are necessary, contact your regional chapter engagement team to complete a defined reorganization process to be chartered and recognized as a chapter with branches. Once a chartered chapter becomes a chapter with branches, it will receive an updated PMI Chapter Charter Agreement to reflect this structure change.

3.3 Chapter Reorganization

Existing chapters must follow the PMI chapter reorganization process to expand their geographic area of operations beyond their current approved territories, establish chapter or student branches, or undertake chapter mergers. If your chapter wishes to undertake such a reorganization, please contact your regional chapter engagement team to learn more about the defined reorganization process.

3.4 Chapter Services

Chapters must demonstrate alignment with the PMI Strategic Plan through an annual process of renewing the PMI Chapter Charter Agreement through a process known as Charter Renewal. The annual Charter Renewal includes the submission of the annual plan and Catalog of Core Services. The Core Services are classified into three categories - required, recommended, and optional services. A chapter is determined to be in alignment when each of the services received by its members is associated with a PMI Strategic Plan objective as described in the Catalog of Core Services.

3.4.1 Required Services

Required services are activities and benefits to be met by all PMI chapters. These services and benefits may be delivered in a variety of ways. Target metrics are self-



defined by the chapter's board and should be developed through effective annual planning.

3.4.2 Recommended Services

Recommended services are activities and benefits which do not have to be met by all chapters but provide value to chapter members. Once a chapter has consistently demonstrated high performance in delivering required services, Chapters are encouraged to consider adding these recommended services during their annual planning process. The service catalog includes examples of recommended services.

3.4.3 Optional Services

Once a chapter has consistently demonstrated high performance in delivering required and recommended services, the chapter can plan for the delivery of optional services. Optional services are activities or benefits that go above and beyond the required and recommended services. The Catalog of Core Services includes examples of optional services.

3.5 Chapter Charter Renewal

Each chapter must complete and submit the charter renewal application annually to maintain its charter agreement with PMI. It is the chapter president's responsibility to complete the charter renewal application, with the assistance and support of the Finance role. Other board members may be called upon to support. This annual charter renewal process is completed online in the Component System (CS).

3.5.1 Purpose

The annual charter renewal process reaffirms chapters are aligned to the terms and conditions outlined in the PMI Chapter Charter Agreement, meet PMI's minimum performance requirements, and are in compliance with PMI policies. The renewal process also verifies chapter activities offered during the previous year. The chapter must verify it maintains an incorporated or registered status and complies with all relevant tax-filing requirements annually.

3.5.2 Charter Renewal Deadline

A chapter must complete the charter renewal process in the Component System (CS) by 31 March of each year.

3.5.3 Minimum Performance Requirements

PMI chapters must verify the following minimum performance requirements are met as part of the annual charter renewal process:

- The chapter must have a minimum of 25 members, all of whom must be current members of both PMI and the chapter.
- The incorporation or registration of the chapter must be complete and up to date, with all applicable renewals/documents filed.



- The chapter is required to submit an annual plan.
- The chapter must provide annual tax reports and annual financial reports.
- The chapter must submit amended governing documents to PMI for review, approval, and filing.
- The chapter must hold annual elections.
- The chapter must submit all officer names and contact information after elections are completed.
- The chapter must maintain appropriate insurance coverage in accordance with PMI chapter insurance policies.

The chapter must also provide verification that it has met legal requirements in its jurisdiction regarding:

- Required number of board of directors meetings with accompanying minutes
- Communication of information to members
- Required number of membership meetings
- Management operations in a manner consistent with its governing documents and applicable laws, including elections
- Delivery of the required core services to all chapter members

3.5.4 Charter Renewal Compliance Review

PMI may select a chapter's charter renewal for a more thorough compliance review. Submission of the charter renewal indicates agreement to comply with review terms. During the review, the chapter will be asked to submit copies of the following documentation to PMI. These documents must also be made available to all chapter members upon request:

- Meeting minutes from the required annual meeting
- Chapter board meeting minutes
- Email communications to the membership as required in the Catalog of Core Services
- Election results and documented policies
- Board transition and succession plans
- Leadership meeting attendance
- Confirmation of annual review of the chapter's governing documents, including the most recent version of the member-ratified bylaws signed by all current board members
- Chapter financial policies
- Detailed financial information including, but not limited to:



- Bank statements, financial statements, ledger books, and names of the assigned signatories of the chapter bank account
- Confirmation of annual review of the chapter's governing documents, including the most recent version of the member-ratified bylaws signed by all current board members
- Proof of direct and indirect tax filings

3.5.5 Charter Renewal Policy Compliance

The chapter must adhere to all applicable regulations and requirements according to PMI policies and procedures, including the PMI Chapter Charter Agreement, the chapter bylaws, and the policies in this manual.

- Failure to meet minimum performance requirements may result in the chapter being reassessed, placed on performance improvement plan, probation, or terminated.
- Chapters failing to submit a renewal or submit an incomplete renewal by the annual deadline must work with Regional Chapter Engagement team member to reconcile missing compliance evidence to complete and approve Charter Renewal as soon as possible but no later than 30 June.
- If there are discrepancies in the data a chapter provides, PMI may return a chapter's charter renewal application and request additional data.
- Misrepresentations of information provided to PMI on the charter renewal are considered a breach of the PMI Chapter Charter Agreement, and the chapter may be subject to probation. See Section 13 for information on chapter probation policies.
- Chapters that have not submitted Charter Renewal and/or have not had their Charter Renewal approved by 30 June, face loss of good standing and potential of being placed on probation on 1 October.

A Performance Improvement Plan (PIP) will outline the regional chapter engagement team's concerns and any areas of non-compliance with deadlines for the chapter to resolve or address PMI's feedback.

3.6 Annual Planning Collection

Each chapter is required to submit an annual plan on a yearly basis to be reviewed by the chapter engagement partner. The annual plan submission date is either linked to the charter renewal submission date of 31 March or a date will be conveyed by the regional chapter engagement team. The annual plan should be based on the annual planning template and include the following steps:

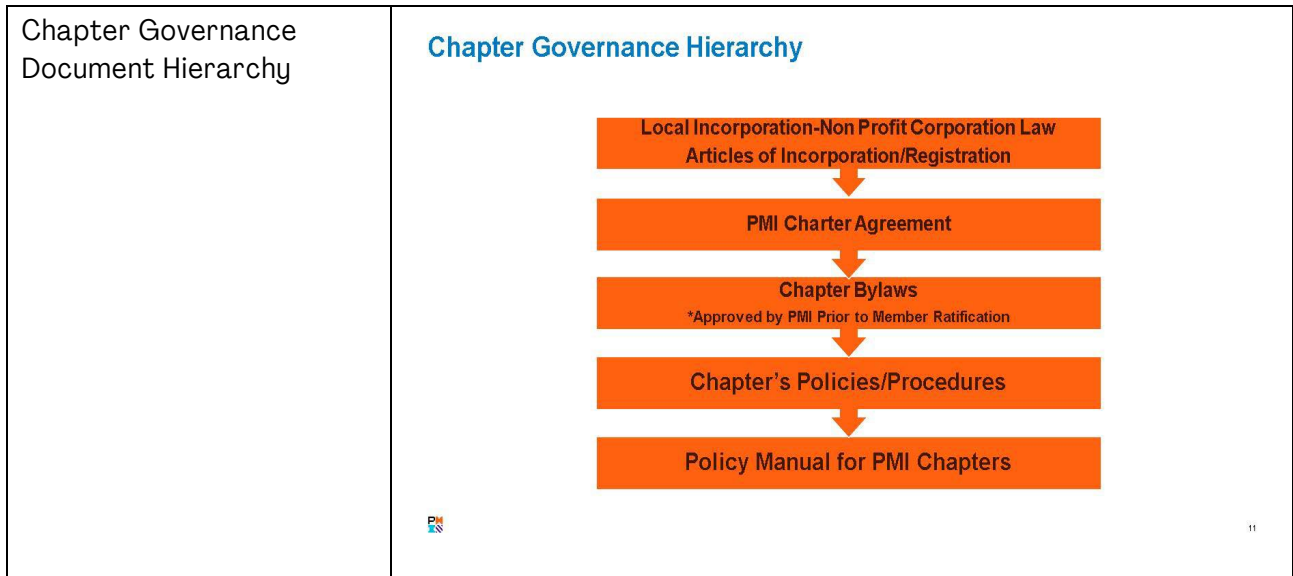
- Identifying business challenges



- Identifying business objectives
- Aligning planned programs and services to the Catalog of Core Services
- Defining How to Deliver on the planned programs and services by creating a new annual plan or modifying an existing annual plan
- Implementing the annual plan

3.7 References

REFERENCE	LOCATION
Chapter Reorganization Handbook	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Chapter Governance & Policies > Chapter Formation & Reorganization Handbooks https://ccp.pmi.org/#/document/document/volunteerresources
Chapter Reorganization Summary Form	Available from https://www.pmi.org/membership/chapters/formation
Leader’s Guide to Chapters with Branches	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Chapter Governance & Policies > > Chapter Formation & Reorganization Handbooks https://ccp.pmi.org/#/document/document/volunteerresources
Annual Planning— Guidelines, Templates, Tips	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Chapter Governance & Policies > Annual Planning & Catalog of Core Services https://ccp.pmi.org/#/document/document/volunteerresources
Charter Renewal FAQs	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Chapter Governance & Policies > Chapter Charter Renewal https://ccp.pmi.org/#/document/document/volunteerresources



4. Chapter Management Policies

4.1 Incorporation Policy

All PMI chapters must incorporate or register as a nonprofit organization according to the laws of the state, province, region, or country in which they primarily conduct their business activities. All PMI chapters must refer to and abide by Section 5. Chapter Identification Policies to determine their Chapter Name.

All PMI chapters are required to submit their executed Articles of Incorporation, or other applicable document, to PMI as part of the chapter formation process. The Articles of Incorporation must be included as one of the chartering requirements after the chapter’s business plan has been approved. PMI requires these documents be submitted in English.

Potential chapters may not become chartered until PMI approves their business plan and receives the incorporation/registration documents and other required materials as defined in the Chapter Formation Process.

4.1.1 Considerations for Incorporation

Some chapters will experience unique challenges in attempting to incorporate in certain jurisdictions. These challenges may include a lack of recognition of nonprofit organizations; a complex variety of rules, regulations, and processes; or no apparent legal mechanisms for incorporating the organization as a legal entity. In these instances, PMI may suspend the incorporation and formation process while the chapter further explores and presents options to PMI.



Requests to change the incorporation deadline must be submitted in writing to PMI. This temporary suspension of the deadline does not waive the requirement for the chapter to incorporate or register with an appropriate governmental body.

If a chapter encounters challenges in the incorporation process, the leadership will work with the regional Chapter Engagement team via their chapter engagement partner for assistance.

4.1.2 Proof of Renewal of Incorporation or Registration

The executed Articles of Incorporation or other applicable documents must have the seal of the applicable government or must otherwise demonstrate that the applicable governmental body has formally accepted the chapter's incorporation within the jurisdiction.

Once a chapter is incorporated, the leadership must submit proof of incorporation or registration renewal or valid proof of incorporation or registered status with each annual charter renewal. PMI requires the documents be submitted in English. It is not PMI's responsibility to know the local regulations for maintaining incorporated status; each state, province, region, or country has different requirements.

4.2 Chapter Bylaws Policy

In addition to the PMI Chapter Charter Agreement and Articles of Incorporation, chapter bylaws are a required and critical governance document for the chapter. Chapter bylaws are required to meet PMI policy and define where leaders can exercise flexibility to fit the needs of the chapter organization. Following PMI's approval, chapter members must approve the chapter bylaws.

4.2.1 Adherence to Bylaws Template

Chapter bylaws must include all sections and articles and conform to the language of the Chapter Bylaws Template, unless a different language is required by the incorporating jurisdiction. Chapter Bylaws must be submitted to the region's Chapter Engagement team for review and approval. Chapter bylaws (governing documents) from non-English speaking nations shall be written in both the native language and English, with the native-language version taking precedence. Chapter must provide PMI with a complete and professional English translation of its bylaws (governing document).

4.2.2 Required Review of Chapter Bylaws

Chapters are encouraged to review their bylaws every three years, or when the governance of the chapter is under review. All changes to the bylaws, no matter the significance must be reviewed and approved by PMI prior to membership approval. All newly revised bylaws must be submitted to your regional chapter engagement team for review and approval.



4.2.3 Bylaws Review and Approval

Chapters must obtain PMI's timely approval of chapter proposed bylaws before presenting bylaws to the chapter membership.

- The chapter bylaws must be based on an electronic copy of the PMI Chapter Bylaws Template.
- The chapter board must review the bylaws template and revise existing bylaws accordingly.
- The chapter board must submit the chapter's proposed bylaws to PMI for review. The review process will result in recommendations and revisions to the proposed chapter bylaws. The review process may take multiple iterations.
- After reviewing PMI's recommendations and revisions, the chapter board must edit, approve, and resubmit their proposed bylaws for review and approval by PMI.
- Once approved by PMI, the chapter board must present the updated bylaws to the chapter membership via email, website, or other legally acceptable means to articulate the importance of the member's involvement in the ratification vote. The voting process for bylaws must adhere to these points:
 - Chapter bylaws must designate that electronic voting can be conducted, if the jurisdiction allows.
 - If an electronic balloting tool is to be used, the chapter president or designee must forward all applicable information to your regional chapter engagement team. The chapter engagement team will set up the ballot, supervise the vote, and forward the results to the designated chapter leader.
 - If the chapter chooses to conduct its own bylaws ratification vote rather than using an electronic balloting tool, the chapter must notify PMI, provide proof of membership approval, update chapter records, and provide a copy of the member-approved bylaws to your regional chapter engagement team to be uploaded to the Component System (CS).

4.3 Insurance Coverage Policies

Chapters must obtain the appropriate insurance and maintain coverage in accordance with PMI chapter insurance requirements.

4.3.1 Insurance Coverage for PMI Chapters

Article 13 of the Charter Agreement states:

Each Chapter is required to have and maintain comprehensive, general liability insurance coverage. The Chapter is also encouraged, but not required, to seek other corporate protections, including, but not limited to, bonding for financial accounts and professional liability insurance for officers and directors. At its sole discretion,



PMI reserves the right to obtain insurance coverage for Chapters and/or to subsidize the insurance of Chapters.

PMI makes available certain insurance coverage on behalf of all PMI chapters. PMI subsidizes coverage for new chapters and those with limited financial resources. PMI secures and pays for the chapter insurance each year and then invoices chapters in Quarter 3. Chapters are encouraged to evaluate their risk(s) and independently obtain additional insurance policies as needed.

PMI works with an insurance broker to ensure that the policies, information, and coverage provided are continuous with a 12-month term. The term will run from January through January for U.S.-based chapters and April to April for chapters outside of the United States.

4.3.2 Chapters within the United States and Canada

All PMI chapters based within the United States and Canada, its territories, and possessions are provided with three types of insurance coverage:

- Commercial general liability
- Professional liability (directors' and officers' insurance)
- Media liability (chapter websites, media, and publishing activities)

4.3.3 Chapters outside of the United States and Canada

All PMI chapters based outside the United States and Canada, its territories, and possessions have three types of insurance coverage:

- International commercial general liability
- Professional liability (directors' and officers' insurance)
- Media liability (chapter websites, media, and publishing activities)

4.3.4 Local Primary Compulsory Coverage

The PMI insurance coverage for all PMI chapters is in excess of local primary compulsory coverage. However, certain types of coverage must be obtained locally either through a local insurance broker or directly from the insurer.

Chapter leaders must investigate if compulsory insurance is needed in their area. If needed, the chapter must obtain insurance coverage to meet this requirement. If a chapter obtains additional insurance policies, copies of the policies must be sent to PMI.

4.3.5 Certificate of Insurance

When sponsoring any gathering of chapter members or other chapter-sponsored event, all PMI chapters must apply for a Certificate of Insurance. A Certificate of Insurance is usually required by hotels, restaurants, and other meeting facilities to document the chapter has adequate insurance coverage. PMI has a well-established process in place with the insurance broker, and it is easy to get the requested Certificate of Insurance.



An Event Checklist form is included with the insurance package when the policies are distributed. This form must be submitted to the Regional Chapter Engagement team to process your Certificate of Insurance request. It can also be downloaded from the Chapter Collaboration Platform (CCP). A copy of this application will be kept on file at PMI.

4.3.6 Invoicing and Payment

Insurance invoicing and distribution are the same for all PMI chapters.

- Chapters chartered for one calendar year or longer and have a minimum cash balance of US\$2,500 as reported in the Financials section of the Charter Renewal, are invoiced for a portion of this insurance cost.
- The account balance for each chapter is determined from the amount reported on the annual Charter Renewal financial report or annual tax filing.
- Payment for chapter insurance is due to PMI by 1 November of each year. As a convenience to chapters, PMI can deduct the US\$200 insurance payment from the chapter's monthly or quarterly dues remittance. The chapter must make this request in writing to the region's chapter engagement team.
- Upon request, a receipt is provided for each chapter that uses this easy payment option. All chapter insurance payment information is uploaded to Insurance Records in the Business Records section of the Component System (CS).

4.4 Insurance Policy Coverage Descriptions

Leaders must review their chapter's insurance policies in full to understand coverage information, limits, and terms and conditions of the insurance coverage. Refer to the Limits of Liability section within the actual insurance policies to determine the exact insurance coverage amounts. After reviewing the insurance policies, chapter board members must determine if additional coverage is needed to ensure sufficient coverage from potential liability exposure. Any additional coverage obtained is a direct expense of the chapter.

4.4.1 Commercial General Liability Coverage (within the United States and Canada)

This insurance policy provides protection to U.S. or Canadian chapters, their board members, and other chapter volunteers, in the event of accidents or other unfortunate mishaps during a scheduled chapter event.

For example, if a member falls and is injured, the chapter will be covered for such an accident, as long as the terms and conditions documented in the policy are met.

Other areas covered under this policy include bodily injury, property injury, personal injury and advertising injury, independent contractors, contractual liability, and host liquor liability.



4.4.2 International Commercial General Liability (outside of the United States and Canada)

This insurance policy provides protection to chapters outside the U.S. and Canada, their board members, and other chapter volunteers if there are accidents or other unfortunate mishaps during a scheduled chapter event.

For example, if a member falls and is injured, the chapter will be covered for such an accident, as long as the terms and conditions documented in the policy are met.

Other areas of coverage included are premises operations, vendor liability, and host liquor liability, broad-named insured, and unintentional errors in disclosure.

4.4.3 Professional Liability Coverage (Directors' and Officers' Liability)

This insurance policy provides insurance protection for the chapter board of directors, appointed or elected volunteers, and chapter employees.

This coverage protects the chapter's representatives from liability for actions performed within the scope of their position as a chapter director, officer, or member. This coverage will not cover actions that are illegal or outside the scope of their positions as chapter directors, officers, or members. Chapters must pay a US\$15,000 retention amount prior to the claim being processed.

4.4.4 Media Liability Coverage for All Chapters

This insurance policy provides coverage for liability arising out of activities on the internet, in print, television, radio, social media and other forms of media. Examples of media include the chapter website or advertising placed on a third-party website or publication.

4.4.5 Coverage Exclusions Applicable to All Insurance Policies

The following exclusions apply to all types of insurance coverage as mentioned previously. For the complete summary of coverage exclusions, chapter leaders should read their chapter's insurance policies in full to understand the terms and conditions of the exclusions.

- Insurance coverage applies only to PMI chapter events held at non-PMI locations, not PMI global events.
- Insurance coverage does not include any physical locations owned or leased by any chapter of PMI (unless the lease is for a physical location for less than 7 days), nor does it cover any property of the chapter or individual members. The person or entity holding an interest in the property must obtain insurance coverage.
- Insurance coverage does not include employee liability benefits or workers' compensation insurance for employment. This coverage should be obtained within a chapter's local jurisdiction because laws surrounding employee benefits and workers' compensation vary.



4.5 Tax Policies

All PMI chapters must comply with direct and indirect tax-filing laws at the federal, state or provincial, national, or other legally appropriate government level. All chapters must demonstrate tax-filing compliance as part of the annual charter renewal process.

4.5.1 Chapters outside of the United States

Leaders of chapters outside of the United States are responsible for investigating and complying with direct and indirect tax reporting requirements in the jurisdictions in which they are incorporated or registered. Additionally, leaders of chapters outside of the United States must adhere to these policies to inform PMI of the chapters' exact direct and indirect tax filings.

- Copies of any direct and indirect tax filings submitted by PMI chapters to governmental authorities must be submitted to PMI. The tax filings submitted to PMI will be scanned and uploaded to the Component System (CS) as a permanent record of the chapters' tax filings.
- All PMI chapters outside of the United States must complete the Financial Report included in the Annual Charter Renewal.
- The chapter leader completing the Financial Report must verify that the chapter has researched any relevant tax-reporting requirements and has determined whether or not the chapter is required to file government tax reports.

4.5.2 Chapters within the United States

PMI has a determination of tax-exempt status from the United States Internal Revenue Service (IRS) under Section 501(c)(6) of the Internal Revenue Service Code (professional societies and business leagues). All U.S. PMI chapters must seek tax exemption as 501(c)(6) organizations.

4.5.2.1 IRS Requirements for U.S.-Incorporated Chapters

Once a chapter located in the United States has incorporated, the U.S. Internal Revenue Service (IRS) requires the chapter to obtain an Employer Identification Number (EIN).

4.5.2.2 PMI Federal Group Tax Exemption

PMI chapters in the United States must obtain an appropriate exemption from federal income taxes by authorizing PMI to include the chapter in the PMI Group Tax Exemption Program for PMI chapters. Each U.S.-based chapter is part of the group tax exemption. New chapters will be added to that year's documents. The chapter must inform its chapter engagement team to decline participation in the PMI tax-exempt program.

4.5.2.3 Filing Federal Taxes

Under the United States tax-reporting laws and regulations for non-profit organizations, PMI chapters are required to file additional tax reports if any of the conditions below are met:



- The chapter has US\$1,000 or more in gross income from unrelated business income, such as advertising revenue, merchandise sales, etc.; or
- The chapter employs staff for whom they must pay employment-related taxes.

4.5.2.4 Federal Tax-Form Filing Details

Each U.S.-based chapter must file the appropriate tax forms annually. Chapter leaders must obtain and complete the appropriate tax forms. Forms can be obtained from the IRS website (www.irs.gov) or from a tax advisor or preparer. The following table describes tax forms applicable to U.S.-based chapters:

FORM NAME	FORM DESCRIPTION AND USE WITH ALL AMOUNTS IN U.S. DOLLARS
Form 990	Reporting over \$100,000 in income
Form 990-EZ	Short Form, income under \$200,000/\$500,000 total assets. If annual gross receipt or total assets exceed those limits, a Form 990 must be filed.
Form 990-N	E-Postcard, income \$50,000 and under. Due to U.S. legislative changes, PMI chapters that meet the IRS definition of small tax-exempt organizations whose gross receipts are normally \$50,000 or less are required to electronically submit Form 990-N, also known as the e-postcard. This electronic filing must be done even if you are not required to file Form 990 or 990-EZ because your gross receipts are normally \$50,000 or less.
Form 990-T	Exempt Organization Business Tax Income Return, for chapters having more than \$1,000 in unrelated business income from activities such as newsletter advertisements (annually). It is also a requirement to file Form 990-T if the organization has over \$1000 in unrelated business income.
Form 941	Employer's Quarterly Federal Tax Return, for chapters that employ their own staff (quarterly). This is used to report Social Security, Medicare, income taxes withheld by an employer, and Social Security and Medicare taxes paid by an employer.
Form 8868	Application for Extension of Time to File an Exempt Organization Return.

The deadline for filing Form 990 or 990-EZ with the IRS differs from the time for filing reports with some states. Chapters may request an extension from the IRS.

4.5.2.5 Filing State Taxes

Chapter leaders must contact their state taxing authority for specific information regarding state tax exemptions, filing requirements, and forms. Chapter leaders must consult with a tax specialist for specific information about state taxable and nontaxable activities.



At their discretion, states may grant an exemption from state income tax obligations to organizations or may recognize the federal exemption within the state. However, some states may not provide any exemptions.

4.5.2.6 Copies of Tax Filings Required by PMI

Copies of the following tax filings must be supplied to PMI as chapter records to be kept in the chapter's permanent electronic records and in the Component System (CS):

- The chapter's final, complete federal tax filing, which is required for the chapter's Annual Charter Renewal
- A copy of the extension for federal tax filing if the chapter filed for one
- The chapter's state tax filing

4.6 Information Security Policies

The protection, defense, and secure use of chapter and PMI electronic systems, information, and data are critical to the reputations of both the chapter and PMI. These policies ensure all chapter electronic systems, including the chapter or PMI information and data they store or access, are protected from loss, theft, or unauthorized use.

4.6.1 Designated Chapter Security Role

Each chapter shall appoint a named individual to be responsible for understanding and managing chapter security risk, completing any chapter information security risk assessment survey requested by PMI, and acting as a single point of contact for the communication of chapter security matters with PMI. The chapter may combine the responsibilities of the security role with suitable existing chapter leadership roles.

4.6.2 Chapter Security Policies

Chapters may be required to maintain security policies in addition to those stated in this manual. The chapter are responsible to know and follow such local regulations as required by its jurisdiction of incorporation/registration. Chapters who create and maintain information security, privacy, or related policies shall ensure those policies are, at a minimum, consistent with the statements in this section.

4.6.3 Security Awareness

All chapter and PMI electronic systems shall be used in a professional, lawful, and ethical manner. The chapter shall ensure:

- All chapter leaders, volunteers, and authorized representatives are aware of chapter security policies and complete any security training provided by PMI.
- Chapter members know to contact the designated security role to report security questions or concerns relating to their experiences and interactions with the chapter.
- Relationships with vendors or other third parties comply with these security policies. See Section 6 for more information regarding third parties.



4.6.4 Technology Asset Security

Technology assets including computers, mobile devices, electronic media, and electronic systems owned by the chapter; owned by or in the possession of a chapter leader, volunteer, and authorized representative; and used to access, process, transmit, or store chapter and PMI information and data shall be protected against loss, theft, or misuse at all times.

Chapter leaders, volunteers, and authorized representatives must use good judgment to protect chapter and PMI information and data at all times:

- Computers, mobile devices, and electronic media shall be stored securely when not in use.
- Any chapter-owned servers, network devices, or related infrastructure systems shall be housed and stored securely.
- Paper or hard copies of chapter and PMI information, including payment information and personal data, shall be appropriately protected while in use and destroyed securely when no longer needed for chapter business purposes.
- Identification cards, payment cards, passports, or similar materials containing payment information or personal data shall be stored securely when not in use.

4.6.5 Security Patch Management

Electronic systems and technology assets capable of receiving security patches shall be kept current with manufacturer recommendations.

4.6.6 Virus and Malware Protections

All computers, mobile devices, or systems accessing, processing, transmitting, or store chapter and PMI information and data shall have an industry-accepted virus and malware protection software installed. Virus and malware protections must be active at all times and automatically updated.

4.6.7 Backups

Data backup procedures shall be in place for critical chapter-owned systems to ensure continued operations within restoration times deemed tolerable by the chapter. Backup files or media shall be appropriately protected during retention times and securely destroyed when no longer needed for recovery purposes.

4.6.8 Access Control

Only chapter leaders, volunteers, and authorized representatives shall have access to chapter and PMI information and data. Any chapter-owned servers, network devices, or related infrastructure systems shall have access limited to only authorized users.



4.6.9 Passwords

Passwords used to access chapter systems not controlled by PMI single sign-on (SSO) shall be strong, complex, and follow industry best practices. An example of a strong, complex password is one with a minimum of eight characters and consists of mixed alphanumeric and special characters.

- Passwords must not consist of all numbers, all special characters, or all alphabetic characters.
- Passwords shall be changed yearly at minimum and must be changed immediately if misuse or compromise is suspected.
- Passwords may not be written or stored as clear text.
- Administrator passwords for chapter websites and critical systems shall be available only to authorized users as defined by the chapter's policies and procedures.
- Chapters shall promptly inform their web service providers of password changes that may affect services.

4.6.10 Activity Monitoring

With the exception of chapter web service (CWS) providers, any chapter-owned, internet-facing systems storing, processing chapter data or those which connect to PMI systems shall be hosted in an environment which is subject to industry-accepted security logging and monitoring standards.

PMI shall be responsible for ensuring the security logging and monitoring standards of chapter web service (CWS) providers adhere to industry-accepted security logging and monitoring standards.

4.6.11 Payment Data Protection

Chapter electronic systems shall not store, transmit, process, or reveal payment card data in any format which may expose it to loss, theft, or misuse.

- Payment card data shall be retained only for chapter business purposes, appropriately protected while in chapter possession, and securely deleted when such business purposes are complete.
- If point-of-sale systems are used at chapter events, they must be under the supervision of a chapter volunteer while in use. Point-of-sale or payment processing devices must be inspected for physical tampering before, during, and after use, and be stored securely when not in use.
- Cash, checks, or other funds received as payment for chapter business purposes shall be appropriately protected during transactions and stored securely.



4.6.12 Personal Data Protection

Chapter leaders and volunteers must securely delete any chapter member or prospective member data or PMI data in their possession when no longer needed for chapter duties. Refer to the Section 6 for additional policies controlling the use of personal data.

Chapter leaders shall ensure vendor or third-party contracts do not include clauses for the use, retention, or sharing of chapter member or prospective member data beyond the requirements of chapter business purposes or in violation of those policies outlined in Section 6.

4.6.13 Incident Reporting

The chapter shall notify PMI Chapter Support at chaptersupport@pmi.org as soon as possible in the event of a suspected or confirmed information security incident, security breach, or data breach.

4.6.14 Regulatory Compliance

The chapter shall comply with all information security, data protection, and privacy regulations applicable to the jurisdiction where the chapter is incorporated/registered.

4.6.15 Chapter Security Risk Assessment

The chapter must complete any security risk assessments requested by PMI to verify implementation of and compliance with the policies listed here.

4.6.16 Chapter Vendor and Third-Party Security

Chapter leaders bear the essential responsibility of diligently ensuring the safety and protection of chapter and PMI data. This responsibility entails a thorough examination of security policies, with a keen focus on aligning them with the specific risks introduced by vendor or third-party services. By doing so, chapter leaders contribute significantly to the safeguarding of sensitive information and maintaining the integrity of the organization's data assets.

Commensurate with the risk the vendor or third party presents to chapter and PMI information and data, the chapter shall require proof of regular and independent assessment against industry-accepted standards of security policy compliance.

PMI shall be responsible for assessing the security compliance of chapter web service (CWS) providers.

4.7 Chapter Alliance and Collaboration Policies

The Chapter Charter Agreement states: “The Chapter shall not develop, engage in, endorse or sponsor programs, services, products or other activities that may be confused with, detract from or damage the common and standardized products, programs, services and other activities that PMI may develop in the areas of project



management standards; professional certification programs; and accreditation under the name of and with the resources from PMI.”

Below is some additional guidance to help chapters in determining whether chapter relationships or activities, specifically, forming alliances, partnerships, speaking engagements or conducting events with other associations/companies may cause conflict:

- **Avoid all chapter relationships/activities with organizations with offerings similar to PMI’s core offerings;** to include organizations that offer;
 - o Project, program or portfolio management certifications for individuals
 - o Project, program or portfolio management standards
 - o Project Management professional memberships or communities
 - o Construction project management certifications
 - o Agile project management certifications
 - o Project risk management certifications
- **For relationships/activities with organizations that do not have offerings similar to PMI;**
 - o Content material and presentations should be strictly educational and should not promote any other organization or offering
 - Examples of acceptable content areas for these relationships/activities include; product management, change management, PM software/technical solutions, Project Management Office, Leadership, Business Acumen, etc.
 - o Prior to acceptance and execution of a cooperative agreement or other formal relationship, the Chapter is required to employ a fair process for full and open exchange and communication with PMI related to agreements they are negotiating with non-PMI entities.

Considerations:

What does PMI offer – or not offer – for which your chapter is considering this solution? How does this solution or concept align to the needs and trends in project management? What gap is your chapter attempting to close?

If you are unsure about a specific organization, please contact a member of the regional Chapter Engagement Team. Chapter must contact your PMI regional Chapter Engagement Team prior to formation of any formal strategic alliance or partnership (e.g., prior to signing a MOU).



4.7.1 PMI Chapter Toastmasters Club Policy

It is optional for a PMI Chapter to create and maintain a Toastmasters International Club (“TI Club”). A TI Club can add to the community of a chapter, and help members gain power skills like leadership, public and impromptu speaking skills, and the ability to give and receive feedback.

Due to the PMI Chapter Charter Agreement, Section 17, Chapter Affiliate Organizations, “unless otherwise stated in PMI policies or authorized by the PMI Board of Directors, the Chapter shall not establish any other affiliated organization or structure except for PMI Student Member-affiliated organizations.” However, this PMI Chapter Toastmasters Club Policy provides authority for PMI Chapters to create/maintain a TI Club by following the below stipulations. If a chapter is interested in creating/maintaining a TI Club, please reach out to your PMI chapter support team member, who will notify the PMI legal team.

PMI Chapters must follow the following stipulations in naming and restricting access to the TI Club*:

1. The PMI Chapter TI Club name must adhere to the following naming convention, which uses “PMI” no more than reasonably necessary to describe the Chapter: **“PMI [*Chapter Location*]Chapter Members’ Toastmasters Club.”**
 - a. Additionally, only the PMI Chapter logo (with the chapter location) that follows PMI’s requirements for PMI Chapter logos may be used in association with the TI Club. The PMI logo found in the upper left-hand corner of www.pmi.org (without the chapter location) or other PMI branding may not be used.
 - b. The TI Club must also adhere to the Toastmasters International (“TI”) guidelines for use of their own logos as set forth in their club policy and/or brand portal, which are subject to change at TI’s discretion and currently found within www.toastmasters.org.
 - c. The PMI Chapter must do nothing to cause confusion, mistake or deception as to the affiliation, connection or association of PMI (as opposed to the Chapter) with TI or the TI Club, or to suggest that PMI is the origin or sponsor of the TI Club or TI’s goods/services, or to suggest that PMI has endorsed TI or TI’s goods/services.
2. PMI Chapter TI Club membership must be restricted to only members of that PMI chapter, and the Executive Committee of the PMI Chapter’s TI Club must enforce this rule.
 - a. If a PMI Chapter member does not renew membership within the chapter, access to the PMI Chapter’s TI Club must be withdrawn.
 - b. If the PMI Chapter does not want to make the TI Club restricted, the chapter must give up control of said club, withdraw its resources from

the club, and change the name of the club so that it does not include “PMI” and shows no association with the PMI chapter or PMI.

*PMI Chapters with an existing TI Club must restrict membership and follow the naming convention set forth above to be in good standing as a PMI Chapter under the PMI Chapter Charter Agreement. Please reach out to your PMI Chapter Engagement team member for guidance on this process. In addition, please refer for more guidance to Section 8: PMI Intellectual Property Policies.

4.7.2 Scrum Alliance

As Scrum is one of the agile approaches included in the PMI-ACP examination, knowledge of Scrum provides a foundation to complement the PMI-ACP requirements. For this reason, CSM courses qualify for the PMI-ACP education eligibility requirements. One hour of education in agile practices equals one contact hour of education eligibility.

The PMI-ACP requires a combination of training, examination, and work experience on agile teams. It also bridges agile approaches, including Scrum, Extreme Programming (XP), Lean, Kanban, and Test-driven Development (TDD). The PMI-ACP certification holder has demonstrated knowledge of a variety of agile methodologies and may be able to recommend the best agile approach to fit a particular situation, as they are not limited to a single approach. The CSM certification process provides an understanding of the Scrum framework, based upon attending the required training and demonstrating progress through the online CSM test. This certification demonstrates to employers and peers your attainment of core Scrum knowledge.

Chapters may proceed with collaboration when the offering is comparing the PMI-ACP and the Scrum Master certifications, the chapter can proceed with the collaboration. Chapters should refrain from collaboration when the offering is promoting competing credentials and organizations, especially as PMI offers the Disciplined Agile Scrum Master (DASM) and Disciplined Agile Senior Scrum Master (DASSM) certifications.

4.7.3. Academic Institutions – PMI Chapter Student Clubs

To support chapters and their efforts to engage with their local higher education institutions and students, the following policies are to ensure a clear and cohesive experience across all regions.

It is optional for chapters to engage with their local higher education and academic institutions. Engagement with faculty and students supports PMI’s mission to promote the profession, support quality education in project management, as well as attract and retain the future of your chapter membership.



Chapters that decide to pursue association with a university or higher education institution in the form of either sponsorship of university programs, events, or establishing a relationship with a student club, must follow the following stipulations:

- A member of the Chapter board of directors must occupy the role of Academic Outreach or ensure that academic outreach and activities are clearly assigned to a board role to ensure transferring of knowledge and responsibility for the relationship.
- In the context of PMI Chapter Student Clubs, the relationship must be clearly defined in a Memorandum of Understanding (MOU) between the Chapter and the academic institution. Documents that pertain to the structure, bylaws, policies and governance of the student club itself are dictated by the university (if the university owns the club), or are defined by the chapter (in the case of a Chapter owns student club).
- The purchase or sale of Group Student Membership, PMI products or services, is arranged between the payee and the Account Manager for that region, and not managed by the Chapter.
- The PMI Chapter Student Club Program applies to any formally established student clubs that exists in partnership with the local PMI Chapter or are owned by the Chapter. Chapters may have relationship with multiple institutions and multiple clubs.

4.8 References

REFERENCE	LOCATION
Chapter insurance information	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Chapter Insurance https://ccp.pmi.org/#/document/document/volunteerresources
IRS Form SS-4, Application for an Employer Identification Number (EIN)	Available from IRS website: https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online
A sample invoice and copies of the insurance policies are posted during the second quarter of each year	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Chapter Insurance https://ccp.pmi.org/#/document/document/volunteerresources
Chapter Bylaws Template	Available in the Chapter Collaboration Platform (CCP) under Documents > Chapter Governance & Policies https://ccp.pmi.org/#/document/document/volunteerresources



Event Checklist Form	Available in the Chapter Collaboration Platform (CCP) under Documents > OLC > Professional Development & Education > Event Support > Guide to Organizing a PMI Conference https://ccp.pmi.org/#/document/document/volunteerresources
Scrum Alliance Website - Certified Scrum Master (CSM)	https://www.scrumalliance.org/get-certified/scrum-master-track/certified-scrummaster

5. Chapter Identification Policies

5.1 Chapter Name Policy

The official chapter name must accurately reflect the location of the chapter and establish the chapter’s affiliation with PMI. Chapter names must include:

- the initials PMI or name Project Management Institute
- the term ‘Chapter’

EXAMPLE NAME	DOES THE EXAMPLE FOLLOW THE POLICY?
PMI California Central Valley Chapter	Yes. This name example has a clearly defined location, area, affiliation, and chapter type.
PMI Bayside Chapter	No. While this name example shows the affiliation with PMI, the location is unclear with no specific area identified; there are many bayside locations globally.
PMI Antarctica	No. This name example is unclear because the location is not specific, there is no area, and the affiliation with PMI is unclear; this could be a PMI office or chapter.

5.1.1 Determining a Chapter Name

If forming a new chapter or considering a name change, the chapter should survey the membership to determine if a name change would be supported, and to collect possible name suggestions. Changes to chapter names should be made to provide greater clarity or reflect changes to the area designation of the chapter.

5.1.2 Chapter Name Approval

If a new name has been determined, chapter leaders must inform PMI to ensure the proposed name will not cause confusion with an existing PMI chapter and is consistent with applicable PMI guidelines. PMI will communicate whether there are any concerns that may prevent the chapter from changing its name.



Local jurisdictions may have required name conventions or reservations on the use of a name. The chapter should explore any potential naming issues with local authorities. If a conflict arises, the chapter will work with its chapter partner to find a mutually acceptable name and naming convention that complies with local law and PMI policy.

5.1.3 Managing Chapter Name Conflicts

If confusion with another chapter exists, then the chapter leaders must consult with the chapter whose name creates a conflict. The dialogue between chapters should address whether any confusion is present and, if so, provide solutions for resolving the confusion.

5.1.4 Chapter Name Change Policy

If an existing PMI chapter is considering a name change, chapter leadership must contact the region’s chapter engagement team to express its intent to change its name before initiating any name change processes. Once the proposed chapter name change has been approved, PMI will provide next steps to officially change the chapter’s name.

5.2 Chapter Logo Policy

PMI Chapters may utilize their official PMI approved chapter logo, which includes the Chapter's name and a unique identifying icon as part of the PMI Project Mark portion of the logo. The chapter may use their approved chapter logo for any materials the chapter sees fit to promote itself locally and globally, including on digital platforms. PMI Chapters may not use the PMI masterbrand logo in any such materials or platforms. Please see the PMI Visual Identity Guidelines for details on chapter logos.

All PMI chapters revising or creating new PMI chapter logos must follow a process defined by PMI to receive PMI approval prior to using or publishing the logo.

5.3 References

REFERENCE	LOCATION
Chapter Name Change Form & Chapter Area Designation Form	Please contact your regional chapter engagement team
Brand Governance and Guidelines	Available from the Volunteer Resource Hub > Marketing & Communication Resources https://www.pmi.org/leadership-central/chapter-volunteer-resources



6. Chapter Membership Policies

6.1 Chapter Membership Eligibility*

Chapter membership is open to and limited to any eligible PMI member who meets the qualifications for such chapter membership and who pays the applicable chapter dues.

*Not Applicable in India

6.2 Chapter Use of PMI Membership Information and Data

Article 9 of the PMI Chapter Charter Agreement states:

Any information pertaining to membership, including but not limited to databases, lists, mailing labels and reports, which is provided by PMI to the chapter may be used only in connection with the authorized, lawful business of the chapter, consistent with the terms of this PMI Chapter Charter Agreement and all applicable data privacy regulations. Such information is considered confidential and shall not be shared with individuals or business entities outside of PMI or the chapter without the express, written permission of the PMI President and CEO. The chapter shall abide by all other policies and guidelines established by PMI related to the use and protection of PMI membership data.

6.3 Membership and Prospect Database Information Policy

PMI chapter leaders have access to daily membership and membership prospect information from the Institute's database via ThoughtSpot.

PMI provides monthly listings from the Membership and Prospect Database to help chapters:

- Track and communicate with their members
- Account for membership dues disbursed from PMI to the chapters
- Recruit and retain members for the chapter

These policies clarify questions regarding the use of the Membership and Prospect Database information by chapters. The Membership and Prospect Database includes information provided through ThoughtSpot, and through electronic communications or hard copy.

6.4 Member Notice and Consent Regarding Use of Application Information

Every individual who joins PMI is required to submit a completed application form with payment of all applicable dues and fees. The information collected on the form is designed to assist PMI and the chapter leaders in serving our members. Members are notified of this use of member information on the application form.



Members also may specifically communicate to PMI on the application form whether they wish to be excluded from mailing list rentals and PMI directories. Information about members' exclusion decisions is also provided to chapter leaders so they also honor members' requests to be excluded from designated items. This field is identified as 'Receive Electronic Notification' in ThoughtSpot.

6.5 Appropriate Use of Membership Data

Examples of appropriate uses of the Membership Database are defined as member benefits or value driven or transaction in nature which may include, but are not limited to:

- Chapter meeting announcements
- New member welcome letters
- Membership renewal "thank you" letters
- Newsletters and other membership communications
- Chapter election ballots

6.5.1 Permitted Use of Membership Data with Prior Consent

Chapters should take into consideration that members may not want the contact information they provide to be listed or posted in electronic format without their prior consent. Examples of uses, which may be appropriate after members have received reasonable notice of the planned activity and have had the opportunity to have their contact information excluded, include but are not limited to:

- Chapter membership directories in hardcopy format
- Member contact information on chapter websites

6.5.2 Membership Directory Disclaimer

Whenever chapters publish membership directories, whether in hardcopy format or online, a disclaimer like the following should be incorporated:

Warning! This list is for official PMI [Chapter name] use as well as individual communication of a networking nature by PMI members and potential members. Use of this information for any other purpose, including but not limited to reproducing and storing in a retrieval system by any means, photocopying or using the names, addresses, email addresses, and phone numbers for any private, commercial, or political mailing is strictly prohibited.

Chapters must make sure their publications are copyright protected and consistent with the laws of the country in which the chapter is incorporated/registered.



6.6 Unpermitted Use of Membership Data

Examples of uses deemed inappropriate, include but are not limited to:

- The sale or release of Membership and Prospect Database listings or information to any third party not stated in this policy.
- The use of mailing lists by chapter officers, board members, appointed committee members, or other authorized representatives to promote services, products, or other offerings in which those individuals have a personal, financial, or other interest.
- Chapter leaders are expected to take appropriate measures to ensure members who requested to be excluded from mailings, directories, and other communications are not included in those activities and all future requests to opt out of receiving such communications will be honored.
- Chapter leaders will keep accurate records of member preferences to ensure the proper administration of all opt-out requests.
- Leaders with questions regarding the appropriate use of Membership and Prospect Database listings and information should contact the PMI Chapter Engagement Department for technical assistance in advance of the proposed activity.

6.7 Adherence with Privacy Laws

Due to national and international variations in privacy laws, PMI chapters must investigate whether the jurisdiction in which they are incorporated or registered has other specific privacy protections relate to the use and publication of membership and prospect information.

6.8 Member List Exchanges among Chapters

PMI chapters may exchange Membership and Prospect Database listings with other PMI chapters to promote chapter-sponsored activities consistent with this policy. Any lists exchanged among chapters must exclude those members who have asked that their contact information not be shared.

6.9 Member List Exchanges among Other Organizations

PMI chapters may exchange membership listings only with other organizations with which the chapters have established collaborative relationships, provided the conditions in this section are met.

Prior to acceptance and execution of a cooperative agreement or other formal relationship with a non-PMI entity, the chapter leaders shall employ a fair process for full and open exchange and communication with PMI through their chapter engagement partner. Minimally, chapter leaders should address the following issues:



- The agreement between the chapter and the non-PMI entity clearly states the terms and conditions related to the use of PMI-related membership listings.
- Chapter leaders should receive communications or other materials that are to be sent by their collaborative partners to PMI members and prospective members prior to the dissemination of such communications or materials.
- Any information provided must exclude those PMI members who have asked that their contact information not be shared.
- Information regarding prospects who are not members of the chapter or of PMI must be excluded from such exchanges.

Prospect information is provided solely for chapter recruitment efforts.

- As part of their efforts to encourage employers to support their employees' involvement in PMI and its chapters, chapters may share appropriate membership information with those employers. Such information is limited to the total number of employers' participating employees who are members, but the chapter must also respect the confidential nature of the members' information. Thus, chapters should provide only a total count of employees who are PMI or chapter members.
- Under no circumstances shall an individual PMI member's information be shared with an employer without the individual's permission.

6.10 Sale of Lists Prohibited

Chapters are strictly prohibited from selling PMI-related Membership and Prospect Database listings, as well as any information, products, or services derived from the Membership and Prospect Database listings, to any third party.

6.11 Ownership of Information

Any information pertaining to PMI membership, including but not limited to databases, lists, mailing labels, and reports, which is provided by PMI to the chapter, may be used only in connection with the authorized, lawful business of the chapter, consistent with the terms of the chapter's charter with PMI.

6.12 Confidential Information

Chapters shall maintain the confidentiality of any and all of PMI's confidential, sensitive, or proprietary information or data (collectively known as confidential information). Such confidential information remains the property of PMI and is furnished to the chapter in confidence and solely in connection with the chapter's affiliated relationship with PMI.

6.13 Return of Confidential Information upon Dissolution

Upon termination of its affiliation with PMI for any reason, the chapter leaders will immediately deliver to PMI all written or electronically stored documentation, including copies of—or concerning—confidential information. The chapter leaders shall make no



further use of such confidential information and shall make reasonable efforts to ensure that no further use is made by the chapter, its board, or its representatives of such confidential information. The chapter's confidentiality obligations shall survive the expiration or termination of its affiliation with PMI.

7. Chapter Dues Policies

7.1 Purpose of Chapter Dues

Membership dues help drive the costs of chapter operations, services, and activities and maintain the financial solvency of the chapter. All chapter membership dues are billed and collected by PMI and then distributed to the appropriate chapter.

7.2 Setting Dues*

In accordance with Article VIII Section 2 of chapter bylaws:

Annual membership dues shall be set by the chapter's board of directors and communicated to PMI in accordance with the policies and procedures established by PMI.

The chapter board of directors must be familiar with their government's rules, laws, culture, and economy regarding the establishment of chapter dues or the receipt of monies from a U.S.-based membership association. Consider these factors when setting chapter dues:

- PMI accepts payments for chapter dues in U.S. dollars and in euros (however, invoices are only in U.S. dollars.)
- The chapter sets dues amounts for both regular and student members.

*Not Applicable in India

7.3 Changing Dues*

PMI will notify chapters to determine any dues annually prior and in advance for a 1 January start date. PMI requires 3 months' notice of a dues change.

PMI sends a communication to President and Finance in the third quarter of each calendar year requesting any dues changes. Notification is made in PMInsight for all chapter leaders. Chapters must submit their changes by 30 September to take effect on 1 January. This early notification allows PMI to generate membership renewal notices reflecting the revised dues amounts. Renewal invoices created in November for January membership expirations must reflect the new chapter dues amounts for the fiscal year that begins on 1 January.

*Not Applicable in India



7.4 Collecting Dues

PMI prohibits chapters from collecting dues directly from members. PMI invoices and collects all PMI membership dues, including chapter membership dues and any applicable indirect taxes. All payments are required to be paid directly to PMI.

7.4.1 Chapter Membership Requirements

To join a PMI chapter, an individual must first be a member of PMI. No dues will be collected or processed for PMI chapter membership if the individual is not a current PMI member in good standing.

7.4.2 Renewals

PMI collects PMI membership and chapter dues together. This is done to ensure chapter members are also members of PMI in good standing, as per PMI policy and in accordance with the PMI Chapter Charter Agreement.

7.4.3 Membership Expiration

The expiration dates of PMI chapter memberships are always aligned with their PMI membership expiration date. Unless an existing member is renewing a chapter membership, a member may not join a new chapter within 90 days of the expiration date of their PMI membership.

7.4.4 Incorrect Processing of Chapter Membership

If PMI incorrectly processes a chapter membership, the individual's membership and respective dues will be transferred to the correct chapter within the month the dues were paid.

7.4.5 Membership Transfers*

If an individual incorrectly joins a chapter or wishes to transfer chapter membership to a different chapter following the month when the dues were paid, no dues will be transferred to the new chapter.

*Not Applicable in India

7.4.6 Membership Refunds in the Event of Member Resignations

In the event a member resigns their PMI membership or chapter membership, there is no refund of membership dues.

7.5 Requirements for Dues Disbursals from PMI

PMI is required by federal statute to obtain the chapter's tax information and status verification. This information is obtained from the chapter by completing one of the following Internal Revenue Service (IRS) Forms:

- IRS Form W-9 for chapters within the United States
- IRS Form W-8 for chapters outside of the United States



Payment is made in the name of the chapter and not made out to any individual. Chapter remittances are disbursed in one of three ways:

- Automated Clearing House (ACH) for U.S.-based chapters only
- Wire transfer for chapters based outside the United States
- Chapters should consult with their local banks to identify any service fees associated with receiving electronic transfers.

7.5.1 Automated Clearing House (ACH)

Chapter dues are electronically transferred from PMI to the bank account specified by the chapter. To change the ACH details, the chapter leadership must contact their regional chapter engagement team to obtain an ACH form to complete and return.

7.5.2 Wire Transfers

Wire transfers are available in limited currencies. For a complete list of currencies and further information, or to change wire transfer details, chapter leadership must contact their regional chapter engagement staff to obtain an International Wire Transfer (IWT) form to complete and return.

The months when these wires are sent are established by PMI and are subject to change. If the months of distribution are to change, PMI will communicate with the respective chapters at least 30 days prior to the effective change date.

7.5.3 Accuracy of Account Information

It is critical to ensure the information provided for the ACH and wire transfer services are correct. If information is incorrectly provided, the funds will not be transferred electronically and the applicable bank fees charged by the bank to PMI will be deducted from the chapter’s next dues disbursement. If PMI submits the incorrect information, the chapter will not be responsible for paying the fee.

7.6 Reconciling Dues Received

PMI chapters must reconcile monetary disbursements by reviewing the Chapter Payments Liveboard in ThoughtSpot. The Chapter Payments Liveboard includes an overview of dues collected by PMI (individual member transactions) and PMI disbursements to the chapter (chapter transactions).

7.7 References

REFERENCE	LOCATION
Automated Clearing House (ACH) and wire transfer forms	Contact your regional Chapter Engagement Team to obtain ACH and wire transfer forms
ThoughtSpot Training	Available at the following link: https://www.pmi.org/leadership-central/thoughtspot

8. PMI Intellectual Property Policies

8.1 Brand Governance and Guidelines

PMI has created a set of guidelines entitled Visual Identity Guidelines for chapter leader use only. This comprehensive document includes complete information on PMI intellectual property policies as related to PMI chapters. Guidelines include the use and development of a PMI chapter logo, use of PMI trademarks, guidance on chapter website design, and more. Please consult this document for all policies related to the PMI brand.

8.2 Use of PMI Logo and Development of Chapter Logo

Only PMI may approve or allow the use of the PMI logo. Please note that the PMI logo indicates communications and programs sponsored by PMI. Except as permitted under this Policy Manual to create or revise a chapter logo that incorporates portions of the PMI logo, the PMI logo may not be used on chapter websites, newsletters, directories, banners, letters, etc. For such communications, the chapter logo must be used to avoid any confusion regarding the origin of such communications.

All requests to use the PMI logo must be forwarded to the PMI Legal Department. Under the Charter Agreement with PMI and for purposes of establishing their chapter logos, PMI chapters are permitted to include “Project Management Institute” and the four-quadrant design of the new PMI logo that includes the letter “P” and the orange semicircle symbol in the upper quadrants and the partial blue square in the lower left quadrant for the purpose of identifying and acknowledging their affiliation with PMI. PMI allows a chapter to customize the bottom right quadrant by using a unique symbol that expresses that chapter’s identity. **However, no PMI chapter is permitted to apply for trademark registration of its chapter logo or any other trademark containing PMI registered or unregistered trademarks.** Registration of a chapter logo as a trademark could create confusion with PMI’s global identity and could interfere with the registration of PMI’s own trademarks.

All proposed chapter logos and trade names shall be submitted to PMI for review and require PMI’s prior approval. In the event a chapter utilizes a third party to assist in the creation of the design element of the chapter logo, this chapter will execute a work-for-hire agreement with such third-party documenting ownership of the design element by the chapter.

Additionally, the chapter’s logo establishes brand identity and visibly identifies the chapter as an organization affiliated with PMI. PMI has created the Visual Identity Guidelines, which provides guidance around chapter logo design (see, Sections 8.1 and 8.9, specifically).



To submit the chapter's idea for the proposed chapter logo, or the revision thereof, please contact your chapter support staff.

8.3 Use of PMI Trademarks

As PMI continues to grow and is more widely recognized and respected as the world's leading professional association in the area of project management, and as its intellectual property (its trademarks and copyrighted written materials and products) increases in value, PMI must use its best efforts to protect these assets.

PMI chapters can help us in these efforts by properly using and attributing PMI trademarks and copyrighted material in accordance with the guidelines provided below.

These guidelines are designed to provide chapters with general information on the proper and permitted use of PMI's intellectual property. Specific questions not addressed herein regarding proper use of PMI trademarks or its copyrighted materials should be directed to the PMI Chapter Engagement Department and the PMI Legal Department.

8.3.1 Purpose of Trademarks

The purpose of a mark is to allow its owner to differentiate its products, goods, or services from those of others. Marks also serve to help consumers in identifying the source of a product, good, or service. A valid mark may be registered by an owner to use exclusively in connection with the owner's product, good, or service. The unauthorized use of a mark in a confusingly similar manner constitutes trademark infringement. However, third parties can use a trademark without specific authorization from the owner to refer to the trademark owner's product or service, as long as proper attribution to the mark and owner are given and there is no confusion as to the source of the good, product, or service associated with the mark.

For more information, please review the PMI Trademark Usage Guidelines and the PMI List of Marks on the PMI website.

8.3.2 List of PMI Marks and Trademark Definitions

The following statements define different types of marks:

- *Mark:* A mark is any trademark, service mark, collective mark, or certification mark.
- *PMI Marks:* For a list of PMI marks with the appropriate usage guidelines and restrictions, please refer to the PMI Trademark Usage Guidelines and the PMI List of Marks. The PMI List of Marks is subject to revision and shall be updated periodically.
- *Trademark:* A trademark is a word, phrase, logo, other designation, or a combination thereof used by an organization to identify or distinguish its products from those of another. The term "trademark" is also used generically to



refer to any type of mark. An owner of a trademark may prevent others from using the trademark without the owner's consent.

- *Service Mark:* A service mark is a word, phrase, logo, other designation, or a combination thereof used by an organization to identify or distinguish its services from those of another.
- *Trademark Attribution Statement:* Use of PMI marks in print or online materials should be accompanied by a simple statement attributing ownership of PMI marks to Project Management Institute, Inc. (See Section 8.6 for more details.)
- *Trademark Notice:* Designating the status of a mark by use of the appropriate symbol, that is, ®, ™, and ™ placed in superscript format following a mark. The registered symbol (®) should only be used for a mark that is registered with the U.S. Patent and Trademark Office. The TM symbol (™) should appear after an unregistered mark that is used in connection with either goods or services. The SM symbol (™) should appear after an unregistered mark that is used specifically in connection with services.

See [PMI's Trademark Usage Guidelines](#) and the [PMI List of Marks](#).

8.4 Guidelines for Use of PMI Marks by PMI Chapters

8.4.1 Proper Use of PMI Trade or Service Marks

Under the terms of the PMI Chapter Charter Agreement, all PMI chapters have been granted permission to use *certain* PMI trade or service marks for legitimate, nonprofit chapter purposes, except as otherwise stated elsewhere in this manual, the PMI Chapter Charter Agreement, or other chapter documents. All such uses of PMI trade or service marks by PMI chapters will be in a fair and appropriate manner, consistent with the terms and requirements of this policy and all applicable laws and regulations. In addition, all such uses will conform to the guidelines for use of PMI marks by PMI, as set forth above, and in the PMI Trademark Usage Guidelines and the PMI List of Marks.

Chapters may not use PMI trade or service marks in connection with any third parties or to sponsor or endorse any non-PMI products or services without the express written permission of PMI's Legal Department.

8.4.2 Alterations of PMI Trade or Service Marks

PMI chapters are not permitted to alter a PMI mark, except in the case of creating or revising a chapter logo that incorporates the PMI logo, which includes the Project Mark with the bottom right quadrant allocated for a singular, customized geometric symbol that express the chapter's identity. For specific guidelines on creating/revising a logo for a PMI chapter, please refer to the Visual Identity Guidelines and Section 5.2 of this manual and contact your chapter support staff.



8.4.3 Proper Use of PMI Certification Marks

PMI will permit PMI chapters to use PMI certification marks only to describe or refer to PMI's Certification Programs. No other use of PMI certification marks is permitted. Any permitted uses of PMI certification marks by PMI chapters will be in a fair and appropriate manner, consistent with all applicable laws and regulations, including the terms and requirements of this policy.

8.4.4 Use in Conjunction with Third Parties

PMI chapters may not use PMI marks or modified versions thereof, in any manner whatsoever with any third party, including businesses and vendors, without obtaining prior express written permission from PMI's Legal Department. However, third parties are free to use *certain* PMI word marks (i.e., not logos) to refer to PMI products and services, as long as such references are truthful, fair, not misleading, and provide proper trademark notice and attribution. All third-party use of allowable marks must comply with PMI's Trademark Usage Guidelines and the PMI List of Marks.

8.4.5 Trademark Registration of Chapter Logo Prohibited

PMI is the sole and exclusive owner of the trademarks "PMI" and the PMI logo. Under the Charter Agreement with PMI, PMI chapters are permitted to include the PMI logo trademark in the design of their chapter logos for the purpose of identifying and acknowledging their affiliation with PMI. However, no PMI chapter is permitted to apply for trademark registration of its chapter logo or any other trademark containing PMI-registered trademarks. **As well, no PMI chapter is permitted to apply for registration of any trademarks it creates/adopts as part of its own programs, etc., without the prior written consent of PMI's Legal Department.** Registration of a chapter logo or mark not originating with PMI by a chapter could create confusion with the global identity of PMI and could interfere with the registration of PMI-owned trademarks. To contact the PMI Legal Department, please reach out to your chapter support staff.

8.5 Examples of Correct and Incorrect Usage of PMI Marks

8.5.1 Proper Usage

When a registered mark is properly used in connection with the goods or services for which it is registered, the registration symbol ® (in superscript format) should be used. If a registered mark is being used in connection with new products or services for which it is not yet registered, use ™ or ℠ (in superscript format) instead.

PMI and third parties may use PMI marks relating to PMI certifications when referring to the respective examination or certification. In such cases, the first appearance of the mark should include the words spelled out, followed by the abbreviated mark in parentheses with the appropriate trademark symbol.

Examples:Project Management Professional (PMP)[®] certificationCertified Associate in Project Management (CAPM)[®] exam

To be properly protected, a mark should not be used as a noun (single or plural); it should be used as an adjective followed by a generic term, for example, *PMBOK[®] Guide*, PMP[®] certification, and PMI[®] seminars. Therefore, use of PMP on its own is discouraged in favor of “PMP[®] exam” or “PMP certified professional.” This rule does not apply to slogans or logos, however, as they generally stand alone. Likewise, avoid using the pluralized version of a mark, that is, PMPs, and instead use “PMP[®] certified professionals.”

CORRECT	INCORRECT
Refer to the <i>PMBOK[®] Guide</i>	Refer to the PMBOK [®]
PMI [®] Certification Program	PMI [®] [with no generic term]
PMI's certification program	PMI [®] 's certification program
PMP [®] certified professional	PMP or PMPs [®]
Study for the PMP [®] exam	Study for the PMP

8.5.2 PMI Mark and Logo

Trade names are the business names of companies and are often used as trademarks as well. If “PMI” is being used to refer only to the Project Management Institute, Inc., it is being used as a trade name, rather than as a trademark. A trade name is a noun. Therefore, the trade name “PMI” may be used in the possessive case, while the trademark may not.

CORRECT	INCORRECT
PMI's bylaws	The PMI [®] bylaws
PMI is the world's leading...	PMI [®] is the world's leading...

Chapters may only use the PMI mark or initials in block capital letters. Chapters may not incorporate any additional letters with the PMI mark/initials or adopt a mark that is similar to the PMI mark, as a means of distinguishing itself as a PMI chapter. Any chapter's geographic distinction should be spelled out in full, or if using an acronym for an abbreviated form of the chapter name, include a space or hyphen after the PMI initials:

CORRECT	INCORRECT
PMI Buenos Aires	PMIBA
PMI BA, or PMI-BA	

Third parties may not incorporate any PMI mark or logo into their own product names, services, trademarks, logos, company names, or domain names and may not adopt marks or logos that are similar to PMI marks and logos.

CORRECT	INCORRECT
pmcertificate.com	pmpcertificate.com


Only third parties expressly authorized by PMI to use a PMI logo (e.g., by executed agreement) may use such logo. In such cases, only the PMI-approved artwork for the specific logo may be used.

8.5.3 The PMI Talent Triangle®

PMI is the sole and exclusive owner of “The PMI Talent Triangle” mark, corresponding logo, and copyrighted graphic (shown below). PMI will permit PMI chapters to use The PMI Talent Triangle marks only to describe, refer to, or promote PMI’s Continuing Certification Requirements (CCR) program and how their courses align with these PMI-defined *skill sets*.

Use of The PMI Talent Triangle marks shall include the following attribution statement: “The PMI Talent Triangle and the Talent Triangle logo are trademarks of Project Management Institute, Inc.” When placed on a website, the PMI Talent Triangle logo must link to the following URL: <https://www.pmi.org/certifications/certification-resources/maintain/earn-pdus>.

Permission to use The PMI Talent Triangle marks does not constitute an endorsement of the chapter’s products and services. Chapters will not alter the PMI Talent Triangle marks in any manner.

<p>The PMI Talent Triangle®</p> <p>Chapters are prohibited from using the PMI Talent Triangle marks in a manner that is likely to cause confusion with, or dilute or damage the reputation or image of PMI, any of its affiliates, or any of their products. The PMI Talent Triangle marks should not be displayed on a chapter website or in chapter-printed materials more prominently than the chapter’s logo. No other use of the PMI Talent Triangle is permitted.</p>	
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8.6 Attribution Statement

Each document or product (whether in print or electronic form) in which any PMI mark appears (e.g., in marketing materials, white papers, advertisements, press releases, brochures, website pages, etc.) should contain an attribution statement at or near the first appearance of a PMI mark, or if multiple PMI marks are used, in a logical and prominent place within the document.

- If the registration status and type of mark are known, the attribution statement should appear in the following form: _____ is a registered mark of Project Management Institute, Inc.
- If the registration status and type of mark are **not** known, or if multiple types of marks (registered and unregistered) must be listed, the attribution statement may simply take the following form, provided, however, **that the registration symbol appears with each registered mark in the document:** _____, _____, _____, and _____ are marks of Project Management Institute, Inc.

8.7 PMI Certification Program Advertising Policy

PMI chapters are not permitted to conduct PMP® preparation courses/classes unless they are in the PMI Authorized Training Partner (ATP) program and use the approved PMI ATP coursework for the PMP® exam. The following information from the PMI Advertising Policy applies to any PMI chapter offering PMI certification exam prep training other than PMP® exam preparation training, unless they are an ATP:

PMI especially values the integrity and reputation of PMI's Certification Program, including but not limited to the PMI Project Management Ready™, Disciplined Agile Scrum Master (DASM)™, Certified Associate in Project Management (CAPM)®, PMI Agile Certified Practitioner (PMI-ACP)®, Disciplined Agile Senior Scrum Master™, PMI Risk Management Professional (PMI-RMP)®, PMI Scheduling Professional (PMI-SP)®, Disciplined Agile Coach (DAC)™, Disciplined Agile Value Stream Consultant (DAVSC)™, PMI Professional in Business Analysis (PMI-PBA) Project Management Professional (PMP)®, Program Management Professional (PgMP)®, and Portfolio Management Professional (PfMP)® certifications.

In order to ensure PMI certifications continue to be of great value to individuals engaged in project management, PMI requires advertisements do not contain false or misleading statements regarding PMI certifications and/or their requirements (consisting of academic education, work experience, formal project management education, willingness to sign and abide by a professional code of ethics, satisfaction of continuing education/professional development requirements, and passing a multiple-choice examination concerning project management).

Advertisements may not state or imply an advertiser's product or service is the sole prerequisite to the attainment of a PMI certification; they must reflect that attainment of a PMI certification requires an individual to meet all of the specific requirements



noted above. PMI prohibits advertisers from making statements claiming or implying a PMI certification may be achieved over a short time frame or with little effort as these types of statements denigrate the reputation of PMI certification; the inclusion of such statements will result in PMI's rejection of the proposed advertisement.

Furthermore, an advertiser shall correctly represent its programs and products as certificate programs. The American National Standards Institute (ANSI) defines a certificate program as a non-degree-granting education or training program consisting of (1) specified learning outcomes within a defined scope and (2) a system designed to ensure individuals receive a certificate only after verification of successful completion of all program requisites including but not limited to an evaluation of learner attainment of intended learning outcomes.

According to the National Organization for Competency Assurance (NOCA), a professional certification, such as those offered by PMI, is a voluntary process by which a nongovernmental agency grants a time-limited recognition and use of a certification to an individual after verifying that he or she has met predetermined and standardized criteria. It is the vehicle that a profession or occupation uses to differentiate among its members, using standards based on existing legal and psychometric requirements.

Additionally, any "guarantees" or "warranties" made by the advertiser regarding its products or services, or any other promotional offers, must be sufficiently detailed to permit the public to evaluate the accuracy and truthfulness of such claims and terms and conditions.

8.8 Use of PMI Copyrighted Materials

Copyright laws give an author or owner of an original work the exclusive right to reproduce, distribute, or otherwise license the right for others to use the original work for non-personal purposes. All standards, periodicals, and books produced or published by PMI are PMI copyrighted materials and are protected under copyright law. If a third party, including a PMI chapter, wants to copy, reference, or reproduce any PMI materials in another work, they must first ensure they have permission from PMI in the form of an agreement. Requests to obtain copies of, or to use, PMI copyrighted materials should be directed to the appropriate department at PMI as directed below. For research and symposia papers presented at PMI events, authors retain the copyright in such works and grant PMI a license to publish.

Pursuant to Section 18 of the Charter Agreement, the use of PMI intellectual property shall be permitted for PMI chapters subject to the terms and conditions in Sections 8.8.1 and 8.8.2.

8.8.1 Reproduction and Distribution of PMI Copyrighted Material

8.8.1.1 Photocopies

Under the terms of their PMI Chapter Charter Agreements, all PMI chapters have been granted permission to photocopy and distribute certain PMI copyrighted materials, or



portions thereof, for legitimate, nonprofit, internal chapter-related use (excludes activities with nonmembers and any external or commercial activities).

- These materials are limited to up to three individual chapters of all PMI standards (per standard, per use), and all PMI-owned articles and papers unless otherwise noted.
- Chapters may distribute such materials only to chapter members and may not charge any fee for such reproductions other than a reasonable charge designed to cover duplication and distribution costs.
- Chapters may reproduce these materials in print or electronic formats; however, if such materials are to be placed on the internet, they must be placed on a secure, password-protected section of the chapter's website and may not be made available to the general public over the internet or through any other electronic means. Chapters must provide full attribution of PMI's copyright in the reproduced material.

8.8.1.2 Reproduction of Periodicals in Chapter Publications

- Chapters are permitted to reproduce the text of all PMI-owned articles and papers (unless noted).
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8.8.1.3 Translation of Periodicals for Chapter Distribution

- Chapters are permitted to translate all PMI-owned articles for distribution to their members and to post on their website. Articles must be at least ninety (90) days or more past PMI's publication date to be eligible for translation and posting/distribution.
- No photographs or artwork may be included in the translated articles.
- Chapters may reproduce text only for the above items and are not permitted to reproduce photos, artwork, charts, or graphs. Chapters may reproduce these materials in print or electronic formats; however, if such materials are to be placed on the internet, they must be placed in a secure, password-protected section of the chapter's website and may not be made available to the general public over the internet or through any other electronic means. Chapters must provide full notification of PMI's copyright in the translation. Chapters must assign all rights, title, and interest in any translated articles back to PMI using the Assignment of Copyright form provided in this manual.



- Appropriate attribution to PMI’s original work must be included in all translations.

8.8.1.4 Reproduction of Materials from PMI Standards for Use in Other Noncommercial, Chapter Member Use Only Works

- Chapters may reproduce a permanent selection of 15 figures and five excerpts (up to 650 words of text from one subsection of a work) from all PMI standards, excluding section and chapter headings.
- As an added benefit, chapters are permitted to reproduce definitions from the *PMBOK® Guide* glossary. Chapters are not required to request permission from PMI and are not charged for these limited uses.
- Chapters must provide full attribution to any PMI copyrighted materials reproduced.
- For other uses of material from PMI standards (including the use of PMI content in commercial products, posting PMI publications electronically on secured nonpublic sites, training for the general public, and translations), chapters must request permission from PMI using the Permissions Form. Translations will be provided under a written agreement with chapter pricing. Any products, training, or other services offered to nonmembers will be licensed under the regular permissions pricing.

8.8.1.5 Third-Party Use Prohibited

Chapters may not use, license, assign, or convey any PMI copyrighted materials in any manner whatsoever with any third party, including businesses and vendors, without obtaining prior, express, written permission from PMI, and the payment of such fees, as PMI may determine.

8.8.2 Derivative Works

8.8.2.1 Definition

For the purposes of this policy, a “derivative work” is a product or publication (1) that contains 35% or more of the material from a PMI publication, or (2) that follows the structure and arrangement of material as the PMI publication, or (3) in which PMI material comprises 50% or more of the total content of the chapter’s product or publication (regardless of whether it contains less than 35% of the total content of the PMI publication from which it is derived), or (4) a translation of a PMI product or publication from one language to another language. For purposes of this definition “PMI material” means the actual text of the PMI publication and does not refer to underlying concepts or ideas being expressed.

8.8.2.2 Internal Chapter Use

PMI grants the chapter permission to create derivative works at no fee or royalty on condition that the derivative work will be distributed to chapter members only for legitimate, nonprofit, noncommercial, chapter-related purposes and provided that (1)



the chapter uses all PMI intellectual property in accordance with the terms and conditions outlined in this manual and (2) the chapter charges no fee for its product, except for reasonable costs for reproduction and that (3) the chapter signs and returns the PMI License Agreement contained in Appendix 2 of this Manual.

8.8.2.3 Use with General Public, Third Parties, or Commercially Sold Products

Upon request by the chapter, PMI will grant the chapter permission to create derivative works for a fee and/or contingent upon the payment of a royalty where the derivative work will be distributed to persons other than chapter members provided that the chapter has obtained a written contract from PMI expressly authorizing the derivative work on such terms and conditions as PMI in its sole determination may require.

8.8.2.4 Copyright Notice

All derivative works must contain a notice stating that the work is a derivative of the applicable PMI material(s) and that it has been produced with the permission of PMI.

Except for translations of PMI publications (in which PMI owns the copyright), the PMI chapter(s) creating the derivative work will actively obtain and own the copyright for that work, and will be responsible for registration of that copyright with the United States Copyright Office, or appropriate foreign government office.

PMI chapters holding a copyright in a derivative work will be required to immediately notify PMI in the event of any infringement of either the PMI copyright, or the derivative work copyright, by a third party; and cooperate with PMI with respect to any action taken by PMI concerning such infringement.

Two (2) copies of the derivative work must be forwarded to PMI upon publication of the derivative work.

Chapters may not use, license, assign, or convey any derivative works based on PMI copyrighted materials in any manner whatsoever with and/or to any third party, including businesses and vendors, without obtaining prior, express, written permission from PMI.

Any uses of derivative works based on PMI copyrighted materials not permitted under the terms of the PMI Chapter Charter require the prior, express, written permission of PMI.

8.8.2.5 Licensed Translations

PMI will not grant any chapter or other entity the right to translate the *PMBOK® Guide* or other PMI works into languages in which PMI publishes an official translation. However, for other languages or publications, PMI will entertain requests to translate the materials on an unofficial and nonexclusive basis. All requests for the right to translate PMI materials must be made in writing to PMI. Copyright and all other rights in the licensed translation will belong to PMI. The chapters and any individuals or entities



assisting the chapter in the translation process of any PMI publication must complete a copyright assignment assigning copyright in the translation to PMI, which is signed by the individuals who have authored, or are authoring, the derivative work in favor of the chapter.

Once a request for a translated work has been approved by PMI, PMI and the chapter will enter into a written agreement, consistent with the terms of this policy, which will permit the translated work. No oral permissions may be granted, and no work may be performed on translating any PMI publications until written permission is granted by PMI.

8.9 References

REFERENCE	LOCATION
PMI Visual Identity Guidelines	Available in the Chapter Collaboration Platform under Documents > Resource Links > Leading the Chapter https://ccp.pmi.org/#/document/document/volunteerresources
Contact Chapter Support Staff	https://www.pmi.org/leadership-central/contact-chapter-leaders
PMI's Trademark Usage Guidelines	https://www.pmi.org/-/media/pmi/documents/public/pdf/about/press-media/trademark-usage-guidelines.pdf
PMI List of Marks	https://www.pmi.org/-/media/pmi/documents/public/pdf/about/press-media/list-of-marks.pdf
PMI Advertising Policy	http://www.pmi.org/about/advertising-sponsorship
Permissions Form	Available from the following link: https://www.pmi.org/permissions/form

8.10 Intellectual Property Appendices

The following appendices must be referenced in addition to the preceding intellectual property policies. Each appendix is presented in its entirety in this section.

Appendices
Appendix 1 Form for Assignment of Copyright
Appendix 2 Terms and Conditions for the Derivative Work License Agreement for Internal Chapter Use/Chapter Member Use Only



Appendix 1 Form for Assignment of Copyright

Form for Assignment of Copyright

This form is only for PMI-owned articles and papers that are translated for distribution to their members and to post on their website. Articles must be at least ninety (90) days or more past PMI’s publication date to be eligible for translation and posting/distribution. No photographs or artwork may be included in the translated articles.

Appropriate attribution to PMI’s original work must be included in all translations. Please complete and email to permissions@pmi.org

Assignment of Copyright

I, _____, (hereinafter the “Contributor”) am preparing a translation of *PMI Article/Paper Title: _____* (the “Work”) into the _____ language for the (Insert Chapter Name) _____

_____. I acknowledge that the Project Management Institute, Inc. (“PMI”) is the owner of the copyright in the Work and that this translation (the “Translated Work”) is a derivative work based on the Work that PMI has given me permission to create and distribute. I acknowledge that all right, title, and interest in and to both the Work and the Translated Work shall remain with PMI. To the extent that ownership in the Translated Work has not already been vested with PMI, I do hereby transfer and assign all worldwide copyright interest(s) in the Translated Work to PMI for the life of such copyright interests.

I warrant that the Translated Work is original and not in the public domain; does not violate, or infringe upon, any existing copyright, common law literary right, privacy right, or any other proprietary right of PMI or any third Party; does not libel any other person, organization, or entity; and does not contain material that is obscene or otherwise contrary to law. If the Work contains copyrighted material owned by a third Party, then I agree to obtain written permission from the copyright owner to use the copyrighted material in the Work and shall promptly deliver such written permission to PMI.

I represent and warrant that I own all rights granted hereunder free of any liens or encumbrances, that I have full power and authority to enter into this Assignment, and do so voluntarily. I understand that, from the date of this Assignment forward, the copyright(s) to the Translated Work(s) created by me or to be created by me, is/are owned, and will be owned, in perpetuity, solely by the Project Management Institute, Inc.

Dated: _____

Translator:

By: _____

Translator/Contributor (Signed & Printed)



Appendix 2 Terms and Conditions for the Derivative Work License Agreement

TERMS AND CONDITIONS FOR THE DERIVATIVE WORK LICENSE AGREEMENT

FOR INTERNAL CHAPTER USE/CHAPTER MEMBER USE ONLY

THIS LICENSE AGREEMENT (hereinafter “Agreement”) is effective upon the date of signature of both Parties and shall run concurrently with the Charter Agreement by the Project Management Institute, Inc. (hereinafter referred to alternatively as “PMI” or “Licensor”), and the PMI Chapter (hereinafter “Licensee”) (each a “Party” and collectively “Parties”). This Agreement is subject to all terms and conditions of the Charter Agreement and any additional terms and conditions for this Agreement shall be based on the following understandings of the Parties:

Licensor owns the federally registered copyright to all of its publications (the “Works”) as well as all prior and subsequent editions of the Works. PMI is also the registered owner of all right, title and interest in the trademarks and service marks associated with these publications, including but not limited to the mark “PMI” (hereinafter “Marks”). Licensor grants Licensee a limited, non-exclusive, non-transferable license from Licensor to copy and to incorporate portions of the Works into internal documents for Chapter members and internal, noncommercial, and non-public organizational use only (the “Derivative Works”) and to make those Derivative Works available for internal Chapter volunteers or to Chapter members only, subject to the terms and limitations contained herein.

WHEREFORE, THE PARTIES AGREE AS FOLLOWS:

1. Definitions. As used in this Agreement, the following terms shall have the following meanings.

Works: Currently published PMI Publications

Derivative Works: Internal documents for Chapter member and internal, noncommercial, and non-public organizational use only. Materials offered to the general public, works sold commercially, and PMP® Exam prep materials are not permitted under this license.

Cause: Any material breach of this Agreement, including but not limited to (1) failure of Licensee to make payments on a timely basis; (2) use of the Work or PMI’s trade and service marks that is inconsistent with the terms and conditions of this Agreement; and (3) instances of fraudulent or criminal acts by a Party.

Logo: A design used by an organization to represent its products, services, or brand.

2. Grant of License. Pursuant to the terms and conditions set forth herein, Licensor hereby grants Licensee a limited, non-exclusive, non-transferable license (the “License”) solely to copy portions of the Works and to place portions of the Works in the Derivative Works created by Licensee and to reproduce and distribute the Derivative Works internally or to Chapter members only. This License does not allow for the entire Works to be reproduced in the Derivative Works,



either in sections or in its entirety, or to be used in any PMP® exam preparation training. In connection with the limited, non-exclusive, non-transferable license, Licensee is permitted to:

a. Display and reprint selected material from the Works as part of the Derivative Works, provided that proper attribution to the Works is provided by Licensee (in the manner specified in paragraph 7 of this Agreement); however, no right is granted to distribute the Works themselves, or any portion thereof, apart from the Derivative Works, or to include the entire Works within the Derivative Works.

b. Use, reproduce, and transmit Licensor's name and trademarks solely in connection with its performance under this Agreement, subject to proper usage guidelines, a copy of which is attached as Appendix "A" to this Agreement. Licensee agrees that in no event will it use any of Licensor's Logos without receiving the prior, written approval of Licensor.

c. Distribute the Derivative Works for internal use or to Chapter members only. Licensee agrees that its users shall be subject to terms and conditions no less restrictive than the terms and conditions of this Agreement.

3. Reservations. Licensor reserves all rights to publish and use, and to license others to publish and use, the Works and any portion thereof, in any manner whatsoever and in any location without restriction.

4. Restrictions/Requirements.

a. Except for the right to create a Derivative Works as specified in paragraph 1, Licensee shall not alter, modify, or change the text of the Works in any way without the prior, express, written permission of Licensor. This License is only for the stated edition of the Works. No rights are granted herein by Licensor to Licensee to use any previous or subsequent editions of the Works.

b. Licensee shall clearly identify those portions of the Derivative Works which consist of the text of the Works. For example, the text of the Works may be printed in a color different from the text color of the Derivative Works prepared by Licensee or labeled with appropriate citations.

c. Licensee may not include hyperlinks to the Works in the Derivative Works and may only produce print and electronic versions of the Derivative Works. If the Derivative Works are to be produced in an electronic format, Licensee will not display or post any portion of the Works contained in the Derivative Works on any public websites.

d. Licensee may contract with third parties to print and distribute the Derivative Works to Chapter members on its behalf, provided that said contracts do not conflict with the terms of this Agreement or in any way contradict or impair the rights of either Party under the terms of this Agreement.

e. Upon request, Licensee shall provide Licensor with two (2) complete and accurate copies of the Derivative Works upon publication.



Licensee shall also provide a complete and accurate copy of the Derivative Works prior to publication if Licensor so requests to review and confirm compliance with this Agreement.

5. Ownership. Licensee hereby acknowledges and agrees that Licensor is the sole and exclusive owner of the Works and the copyright in the Works; and the title to and ownership of the Works shall remain with Licensor (or its successors or assigns) throughout the term of this Agreement, and any subsequent Agreement. Licensee shall be the sole and exclusive owner of those portions of the

Derivative Works that are wholly original creations of Licensee and are not contained in the Works.

6. Intellectual Property Warranty.

a. Licensee represents and warrants that the Derivative Works will be original works and will not infringe upon the proprietary rights of any Party to this Agreement and/or third party.

b. Licensor specifically represents and warrants that it is the owner of all right, title and interest in the Works and is not aware of any rights of a third party which would be infringed by Licensee's permitted use of the Works as specifically described herein.

7. Copyright Notices and Registrations.

a. In order to reflect Licensor's ownership of the Works and to protect Licensor's interests therein:

(1). With respect to all publications of the Derivative Works, or any portion of the Derivative Works, Licensee shall include the copyright notice as set forth in Appendix "B," attached hereto and incorporated herein by this reference.

(2). Licensee shall also include copyright notices in the form required by the laws of any nation in which the Derivative Works are to be published.

8. Disclaimer of Warranties/Force Majeure/Limitation of Liability.

a. Except as stated in Section 6.b., Licensor makes no representations about the merchantability of the information contained in the Works or the suitability of the information contained in the Works for any particular purpose. All such information and related graphics are provided on an "AS IS" basis and without warranty or guarantee of any kind.

b. In no event shall Licensor be liable for any special, indirect or consequential damages, or any damages whatsoever, resulting from loss of use, damage, delay, failure of performance, data or profits, whether in an action of contract, negligence or other tortious action arising out of, or in connection with, the use or performance of information in the Works or Derivative Works, including but not limited to, an act of God, fire, or other catastrophe (including but not limited to severe weather, earthquakes, or other natural disasters), electrical, computer or mechanical failure, failure of communication lines, telephone or other interconnection problems, computer



viruses, unauthorized access, theft, operator errors, work stoppage, or delays or failure to act of any carrier or agent or governmental restrictions.

9. Infringement.

a. Licensee shall promptly notify Licensor of any infringement of the copyrighted material from the Works that has been licensed to Licensee hereunder and is contained in the Derivative Works, whenever Licensee becomes aware of such infringement. Licensee shall cooperate with Licensor, at Licensor's expense, to prevent and stop such infringement or act and if so requested by Licensor, shall join with Licensor as a Party to any legal case or action brought by Licensor for such purpose. Licensor shall have full control over any such case or action, including, without limitation, the right to choose if, when, and where to initiate any case or action, and to select counsel, or to settle on any terms Licensor deems advisable in its sole and exclusive discretion. Licensor shall bear all expenses connected with the foregoing, except that if Licensee wishes to retain its own counsel, Licensee shall do so at its own and sole expense.

b. Licensee shall not challenge the validity of the copyright in the Works or support third parties in any challenge thereto.

10. Term of Agreement.

a. The License shall commence upon the date of signature of both Parties and shall run concurrently with the Charter Agreement by PMI and the PMI Chapter.

b. The Parties reserve the right to terminate this Agreement without cause upon sixty (60) days' notice. This Agreement shall also terminate automatically on the occurrence of (1) the bankruptcy or insolvency of either Party; or (2) assignment of this Agreement by Licensee without the expressed written consent of Licensor.

c. Upon expiration or termination of this Agreement, Licensee shall remove all portions of the Works from the Derivative Works. Thereafter, Licensee shall have no further right to use, prepare, publish, or distribute any portion of the Works that is in the Derivative Works. Licensee may re-use portions of the Derivative Works that are the wholly original creations of Licensee and are not derived from the Works in any manner. Upon expiration or termination of the License, Licensee shall also make good faith, reasonable efforts to remove and destroy all copies of the Works and the Derivative Works which contain portions of the Works in its possession on all individual computers, computer servers, work stations, or other electronic equipment attached to their Intranets (except for portions of the Derivative Works that are wholly original) and shall promise and warrant that, to the best of the Licensee's knowledge, no such copies of the Works or the Derivative Works which contain portions of the Works are in its possession.

11. Royalty Payments. In consideration of the License granted hereby for Licensee to create and distribute Derivative Works to PMI Chapter members only, Licensor shall waive all fees normally due under this Agreement. If there are any commercial uses or public offerings of any Derivative Works then such Derivative Works will require a separate license with applicable fees due.



12. Written Communications/Notices. All notices, orders and other communications provided for hereunder shall be in writing and shall be sent to the other Party by mail or email. All written communications shall be deemed to have been given on the date when received.

13. General Provisions to Agreement.

a. If the term, covenant, condition, or application of any provision or provisions of this Agreement to any particular facts or circumstances shall be held to be invalid or unenforceable by any court of competent jurisdiction, the remainder of terms, covenants, or conditions of this Agreement, other than those found to be invalid, shall be enforced to the fullest extent permitted by law.

b. No waiver or breach of any term or provision of this Agreement shall be construed or operate as a waiver of any other breach of the terms or provisions of this Agreement.

IN WITNESS THEREOF, the Parties hereto represent below that they have read and understand the terms of the Agreement, and that they are duly authorized to enter into this Agreement by, and on behalf of, their respective organizations.

PROJECT MANAGEMENT INSTITUTE, INC.

By: _____ Date: _____

Product Manager, Publications

PMI CHAPTER

By: _____ Date: _____

Print Name, Title, and Chapter Name: _____



Appendix 1 Form for Assignment of Copyright

Form for Assignment of Copyright

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Appropriate attribution to PMI’s original work must be included in all translations. Please complete and email to permissions@pmi.org

Assignment of Copyright

I, _____, (hereinafter the “Contributor”) am preparing a translation of **Publication Title:** _____ (the “Work”) into the _____ language for the (Insert Chapter Name) _____

_____. I acknowledge that the Project Management Institute, Inc. (“PMI”) is the owner of the copyright in the Work and that this translation (the “Translated Work”) is a derivative work based on the Work that PMI has given me permission to create and distribute. I acknowledge that all right, title, and interest in and to both the Work and the Translated Work shall remain with PMI. To the extent that ownership in the Translated Work has not already been vested with PMI, I do hereby transfer and assign all worldwide copyright interest(s) in the Translated Work to PMI for the life of such copyright interests.

I warrant that the Translated Work is original and not in the public domain; does not violate, or infringe upon, any existing copyright, common law literary right, privacy right, or any other proprietary right of PMI or any third Party; does not libel any other person, organization, or entity; and does not contain material that is obscene or otherwise contrary to law. If the Work contains copyrighted material owned by a third Party, then I agree to obtain written permission from the copyright owner to use the copyrighted material in the Work and shall promptly deliver such written permission to PMI.

I represent and warrant that I own all rights granted hereunder free of any liens or encumbrances, that I have full power and authority to enter into this Assignment, and do so voluntarily. I understand that, from the date of this Assignment forward, the copyright(s) to the Translated Work(s) created by me or to be created by me, is/are owned, and will be owned, in perpetuity, solely by the Project Management Institute, Inc.

Dated: _____

Translator:

By: _____

Translator/Contributor (Signed & Printed)



Appendix 2 Terms and Conditions for the Derivative Work License Agreement

TERMS AND CONDITIONS FOR THE DERIVATIVE WORK LICENSE AGREEMENT

FOR INTERNAL CHAPTER USE/CHAPTER MEMBER USE ONLY

THIS LICENSE AGREEMENT (hereinafter “Agreement”) is effective upon the date of signature of both Parties and shall run concurrently with the Charter Agreement by the Project Management Institute, Inc. (hereinafter referred to alternatively as “PMI” or “Licensor”), and the PMI Chapter (hereinafter “Licensee”) (each a “Party” and collectively “Parties”). This Agreement is subject to all terms and conditions of the Charter Agreement and any additional terms and conditions for this Agreement shall be based on the following understandings of the Parties:

Licensor owns the federally registered copyright to all of its publications (the “Works”) as well as all prior and subsequent editions of the Works. PMI is also the registered owner of all right, title and interest in the trademarks and service marks associated with these publications, including but not limited to the mark “PMI” (hereinafter “Marks”). Licensor grants Licensee a limited, non-exclusive, non-transferable license from Licensor to copy and to incorporate portions of the Works into internal documents for Chapter members and internal, noncommercial, and non-public organizational use only (the “Derivative Works”) and to make those Derivative Works available for internal Chapter volunteers or to Chapter members only, subject to the terms and limitations contained herein.

WHEREFORE, THE PARTIES AGREE AS FOLLOWS:

1. Definitions. As used in this Agreement, the following terms shall have the following meanings.

Works: Currently published PMI Publications

Derivative Works: Internal documents for Chapter member and internal, noncommercial, and non-public organizational use only. Materials offered to the general public, works sold commercially, and PMP® Exam prep materials are not permitted under this license.

Cause: Any material breach of this Agreement, including but not limited to (1) failure of Licensee to make payments on a timely basis; (2) use of the Work or PMI’s trade and service marks that is inconsistent with the terms and conditions of this Agreement; and (3) instances of fraudulent or criminal acts by a Party.

Logo: A design used by an organization to represent its products, services, or brand.

2. Grant of License. Pursuant to the terms and conditions set forth herein, Licensor hereby grants Licensee a limited, non-exclusive, non-transferable license (the “License”) solely to copy portions of the Works and to place portions of the Works in the Derivative Works created by Licensee and to reproduce and distribute the Derivative Works internally or to Chapter members only. This License does not allow for the entire Works to be reproduced in the Derivative Works,



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a. Display and reprint selected material from the Works as part of the Derivative Works, provided that proper attribution to the Works is provided by Licensee (in the manner specified in paragraph 7 of this Agreement); however, no right is granted to distribute the Works themselves, or any portion thereof, apart from the Derivative Works, or to include the entire Works within the Derivative Works.

b. Use, reproduce, and transmit Licensor's name and trademarks solely in connection with its performance under this Agreement, subject to proper usage guidelines, a copy of which is attached as Appendix "A" to this Agreement. Licensee agrees that in no event will it use any of Licensor's Logos without receiving the prior, written approval of Licensor.

c. Distribute the Derivative Works for internal use or to Chapter members only. Licensee agrees that its users shall be subject to terms and conditions no less restrictive than the terms and conditions of this Agreement.

3. Reservations. Licensor reserves all rights to publish and use, and to license others to publish and use, the Works and any portion thereof, in any manner whatsoever and in any location without restriction.

4. Restrictions/Requirements.

a. Except for the right to create a Derivative Works as specified in paragraph 1, Licensee shall not alter, modify, or change the text of the Works in any way without the prior, express, written permission of Licensor. This License is only for the stated edition of the Works. No rights are granted herein by Licensor to Licensee to use any previous or subsequent editions of the Works.

b. Licensee shall clearly identify those portions of the Derivative Works which consist of the text of the Works. For example, the text of the Works may be printed in a color different from the text color of the Derivative Works prepared by Licensee or labeled with appropriate citations.

c. Licensee may not include hyperlinks to the Works in the Derivative Works and may only produce print and electronic versions of the Derivative Works. If the Derivative Works are to be produced in an electronic format, Licensee will not display or post any portion of the Works contained in the Derivative Works on any public websites.

d. Licensee may contract with third parties to print and distribute the Derivative Works to Chapter members on its behalf, provided that said contracts do not conflict with the terms of this Agreement or in any way contradict or impair the rights of either Party under the terms of this Agreement.

e. Upon request, Licensee shall provide Licensor with two (2) complete and accurate copies of the Derivative Works upon publication.



Licensee shall also provide a complete and accurate copy of the Derivative Works prior to publication if Licensor so requests to review and confirm compliance with this Agreement.

5. Ownership. Licensee hereby acknowledges and agrees that Licensor is the sole and exclusive owner of the Works and the copyright in the Works; and the title to and ownership of the Works shall remain with Licensor (or its successors or assigns) throughout the term of this Agreement, and any subsequent Agreement. Licensee shall be the sole and exclusive owner of those portions of the

Derivative Works that are wholly original creations of Licensee and are not contained in the Works.

6. Intellectual Property Warranty.

a. Licensee represents and warrants that the Derivative Works will be original works and will not infringe upon the proprietary rights of any Party to this Agreement and/or third party.

b. Licensor specifically represents and warrants that it is the owner of all right, title and interest in the Works and is not aware of any rights of a third party which would be infringed by Licensee's permitted use of the Works as specifically described herein.

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(2). Licensee shall also include copyright notices in the form required by the laws of any nation in which the Derivative Works are to be published.

8. Disclaimer of Warranties/Force Majeure/Limitation of Liability.

a. Except as stated in Section 6.b., Licensor makes no representations about the merchantability of the information contained in the Works or the suitability of the information contained in the Works for any particular purpose. All such information and related graphics are provided on an "AS IS" basis and without warranty or guarantee of any kind.

b. In no event shall Licensor be liable for any special, indirect or consequential damages, or any damages whatsoever, resulting from loss of use, damage, delay, failure of performance, data or profits, whether in an action of contract, negligence or other tortious action arising out of, or in connection with, the use or performance of information in the Works or Derivative Works, including but not limited to, an act of God, fire, or other catastrophe (including but not limited to severe weather, earthquakes, or other natural disasters), electrical, computer or mechanical failure, failure of communication lines, telephone or other interconnection problems, computer



viruses, unauthorized access, theft, operator errors, work stoppage, or delays or failure to act of any carrier or agent or governmental restrictions.

9. Infringement.

a. Licensee shall promptly notify Licensor of any infringement of the copyrighted material from the Works that has been licensed to Licensee hereunder and is contained in the Derivative Works, whenever Licensee becomes aware of such infringement. Licensee shall cooperate with Licensor, at Licensor's expense, to prevent and stop such infringement or act and if so requested by Licensor, shall join with Licensor as a Party to any legal case or action brought by Licensor for such purpose. Licensor shall have full control over any such case or action, including, without limitation, the right to choose if, when, and where to initiate any case or action, and to select counsel, or to settle on any terms Licensor deems advisable in its sole and exclusive discretion. Licensor shall bear all expenses connected with the foregoing, except that if Licensee wishes to retain its own counsel, Licensee shall do so at its own and sole expense.

b. Licensee shall not challenge the validity of the copyright in the Works or support third parties in any challenge thereto.

10. Term of Agreement.

a. The License shall commence upon the date of signature of both Parties and shall run concurrently with the Charter Agreement by PMI and the PMI Chapter.

b. The Parties reserve the right to terminate this Agreement without cause upon sixty (60) days' notice. This Agreement shall also terminate automatically on the occurrence of (1) the bankruptcy or insolvency of either Party; or (2) assignment of this Agreement by Licensee without the expressed written consent of Licensor.

c. Upon expiration or termination of this Agreement, Licensee shall remove all portions of the Works from the Derivative Works. Thereafter, Licensee shall have no further right to use, prepare, publish, or distribute any portion of the Works that is in the Derivative Works. Licensee may re-use portions of the Derivative Works that are the wholly original creations of Licensee and are not derived from the Works in any manner. Upon expiration or termination of the License, Licensee shall also make good faith, reasonable efforts to remove and destroy all copies of the Works and the Derivative Works which contain portions of the Works in its possession on all individual computers, computer servers, work stations, or other electronic equipment attached to their Intranets (except for portions of the Derivative Works that are wholly original) and shall promise and warrant that, to the best of the Licensee's knowledge, no such copies of the Works or the Derivative Works which contain portions of the Works are in its possession.

11. Royalty Payments. In consideration of the License granted hereby for Licensee to create and distribute Derivative Works to PMI Chapter members only, Licensor shall waive all fees normally due under this Agreement. If there are any commercial uses or public offerings of any Derivative Works then such Derivative Works will require a separate license with applicable fees due.



12. Written Communications/Notices. All notices, orders and other communications provided for hereunder shall be in writing and shall be sent to the other Party by mail or email. All written communications shall be deemed to have been given on the date when received.

13. General Provisions to Agreement.

a. If the term, covenant, condition, or application of any provision or provisions of this Agreement to any particular facts or circumstances shall be held to be invalid or unenforceable by any court of competent jurisdiction, the remainder of terms, covenants, or conditions of this Agreement, other than those found to be invalid, shall be enforced to the fullest extent permitted by law.

b. No waiver or breach of any term or provision of this Agreement shall be construed or operate as a waiver of any other breach of the terms or provisions of this Agreement.

IN WITNESS THEREOF, the Parties hereto represent below that they have read and understand the terms of the Agreement, and that they are duly authorized to enter into this Agreement by, and on behalf of, their respective organizations.

PROJECT MANAGEMENT INSTITUTE, INC.

By: _____ Date: _____

Barbara Walsh | Product Manager, Publications

PMI CHAPTER

By: _____ Date: _____

Print Name, Title, and Chapter Name: _____



9. Chapter Website and Social Media Policies

9.1 Chapter Website Hosting, Naming, and Design

All PMI chapters are required to establish and maintain a website for marketing, communication, and membership purposes.

9.2 Chapter Website Development, Hosting, and Naming

All HTML pages for a chapter website are to be developed by the chapter. PMI does not offer file transfer protocol (FTP) access to upload website files.

General questions about types of website design software or any other questions regarding design of chapter websites may be emailed to the Chapter Engagement Department.

9.2.1 Hosting with an Internet Service Provider (ISP)

When hosting with an ISP, more advanced capabilities may be available for the chapter's website such as online forms, database-driven pages for member areas, surveys, and discussion groups. When researching ISP providers, verify costs. Monthly hosting fees will vary greatly depending upon the chapter's individual support needs.

9.2.2 Domain Name Policies

9.2.2.1 Domain Name Selection

Domain names must clearly identify the chapter as the sponsor of the website and not PMI. PMI recommends using the initials PMI together with the chapter's name or acronym in the domain name. The .org extension is also recommended in the domain name to identify the chapter as a not-for-profit organization. It is not acceptable to use domain names that may misrepresent the chapter, as shown in the following examples:



EXAMPLE DOMAIN NAME	DOES THE EXAMPLE FOLLOW THE POLICY?
www.pmilatviachapter.org	Yes. This example shows the chapter's affiliation with PMI, the chapter name is spelled out, and the name uses .org.
www.pmilvc.org	Yes. This example shows the chapter's affiliation with PMI, the chapter name is an acronym, and the name uses .org.
www.pmi-lvc.lv	Yes. While this example uses a country extension instead of .org, this name example shows the chapter's affiliation with PMI and the chapter name is an acronym.
www.pmilatvia.org	No. This example could be mistaken for a PMI office in Latvia rather than a chapter.
www.pmi.lv	No. This example could be mistaken for any party with the initials PMI; it also does not identify the website as that of a chapter affiliated with PMI.

9.2.2.2 Domain Name Hosting

The chapter's domain name requires a fee. There are services available for domain hosting. These services charge nominal fees and are used by many PMI chapters. PMI does not host registered domain names.

9.2.3 Chapter Website Logo Use

The chapter website must use the chapter logo that has been approved by PMI. The PMI logo may be used only as a link back to the PMI.org home page from the chapter website. Links to the PMI homepage must open in a new browser window.

9.2.4 Chapter Website Web Content

All web content published by PMI chapters must adhere to PMI electronic use and intellectual property policies. PMI will review chapter websites on an ongoing basis to ensure compliance with PMI intellectual property policies. Any use of PMI intellectual property must be properly marked. Failure to abide by this policy is grounds for PMI to take further action, such as refusing to upload the page or removing the page from the PMI server.

9.3 Links to the PMI Home Page (PMI.org)

Chapters are permitted and encouraged to link to PMI.org upon agreement with the following terms and conditions:

- *Proper Form of Link:* PMI chapters are permitted to link to PMI's home page using one of the following forms: the name Project Management Institute, the initials PMI, or the PMI logo.



- *No Misrepresentations:* A PMI chapter may not misrepresent its relationship with PMI, or present false or misleading impressions about PMI.
- *No Framing:* PMI chapters will not place PMI web pages in a “frame” within their own websites without specific written permission from PMI.
- *No Negative References:* PMI chapters may not make negative or disparaging references to PMI, its services, or its members or otherwise compare PMI, its services, or its members unfavorably to others.
- *No Objectionable Content:* PMI chapters’ websites must not contain or link to content that may be interpreted as libelous, obscene, or criminal or which may infringe or violate any third-party rights.
- *Protection of Marks:* PMI chapters may not use PMI names, marks, or other materials in a manner that is likely to cause confusion with another source or dilute or damage the reputation or image of PMI.
- *Proper Use of the PMI Logo:* PMI chapters’ use of the PMI logo for linking purposes will conform in all respects to the logo usage guidelines. The PMI logo may only be used as a link to the PMI home page and not to link to any other portion of the PMI website. Contact your chapter engagement team member to obtain a copy of the guidelines before establishing the link. If linking to an overview page on the PMI website, please use appropriate text to name the overview section.
- *Indemnification:* PMI shall have no responsibility or liability for any content appearing on the chapter’s website. PMI chapters agree to indemnify and defend PMI against all claims arising out of or based upon its website.
- *Right to Revoke:* PMI reserves the right at any time and in its sole discretion to revoke this right and request that the chapter remove from its website any link(s) to the PMI website.
- *Amendment to Terms and Conditions:* PMI reserves the right to amend these linking terms and conditions at any time. By continuing to link to the PMI website, the chapter agrees to abide by the linking terms and conditions then current, as well as other legal terms of use and conditions on the PMI website, as amended from time to time.

9.4 Social Media Policy

A chapter’s social media presence, posts, and content must align with PMI Culture Values. Chapter leaders must manage the chapter’s social media presence according to the bylaws and fiduciary duties.

9.4.1 Adherence to PMI Social Media Guidelines

Chapter leaders must read, understand, and follow the PMI Social Media Guidelines to manage the chapter’s social media presence.



9.4.2 Consistent Use of PMI Identification

Proper use of the PMI logo on the web, including social media spaces, is critical to maintenance of brand standards. Chapters must visually identify their social media presence with the PMI brand.

The chapter logo may be used alone as profile picture, icon, or avatar on social media websites. The PMI identity must be included in any social media pages or group names, to show the chapter’s affiliation with PMI, as this example shows:

EXAMPLE NAME	DOES THE EXAMPLE FOLLOW THE POLICY?
PMI Delaware Valley Chapter	Yes. This name example shows the chapter’s affiliation with PMI.
Delaware Valley Chapter	No. This name example does not show the chapter’s affiliation with PMI.
PMI Delaware Valley	No. This name example does not show the entity is a chapter.

9.4.3 Promotion of Chapter Achievements and Newsworthy Activities

Chapters are encouraged to promote their achievements, special events, and newsworthy activities. Chapters can use their social media channels to promote this news to their networks. All social media content published on Chapters’ channels must follow the Social Media Participations Guidelines for PMI Volunteers found on the Chapter Volunteer Resource Hub.

However, chapters that wish to reach a wider audience than their social media networks may engage with their local media. For more information and best practices for media outreach, please contact your Chapter Engagement Partner who will connect you with the appropriate Regional Communications Lead.

9.5 References

REFERENCE	LOCATION
Chapter Web Services Provider Program	Available in the Chapter Collaboration Platform under Documents > OLC > Directory of Technology Services https://ccp.pmi.org/#/document/document/volunteerresources
Social Media Guidelines for Volunteers	Available from the About – Our Governance & Leadership – Governance Documents section of PMI.org at https://www.pmi.org/about/leadership-governance/documents
PMI Brand Guidelines	Available in the Chapter Volunteer Resource Hub under Marketing and Communication Resources https://www.pmi.org/leadership-central/chapter-volunteer-resources

10. Chapter Educational Activity Policies

10.1 Professional Development Units for Chapter Events

All chapters can award Professional Development Units (PDUs) for their programs and events. Chapter PDU activities fit into either of two categories: Education or Giving Back. All education PDU activities must align with the PMI Talent Triangle®. Those activities offering technical PDUs must additionally be aligned with PMI certifications. Giving Back PDUs do not need to align to the PMI Talent Triangle.

One PDU is earned for every one hour spent in a planned, structured, learning experience or activity. Fractions of PDUs may be reported in increments of 0.25 = 15 minutes of learning. 1 PDU = 1 Hour of Learning.

10.2 Chapter Responsibilities When Offering PDUs

If a chapter offers PDU activities, the following guidelines should be followed:

- Provide attendees with a receipt and/or certificate to confirm their participation. This document should include the chapter name, date, activity title, and PDUs offered.
- Maintain records of attendees at events for at least a one year time frame.
- If the chapter plans to submit PDUs on behalf of attendees, the chapter should inform attendees as such so they do not also attempt to claim PDUs on their own. In order to minimize any confusion or questions from attendees.
- the chapter should submit batch claims for PDUs as soon as possible once the event is complete.

A PMI chapter may use their approved chapter logo to promote their respective events that qualifying for PDUs. Chapters partnering with a PMI Authorized Training Partner (ATP) must clearly state the name of the organization as well as the name of the ATP-certified trainer when promoting these offerings.

10.3 Use of PMI Education Provider Portal and CCR System (CCRS)

All chapters have access to the Educational Provider Portal, the interface which enables chapters to register and maintain their PDU-earning activities and courses so that certification holders can find these courses within CCRS and claim PDUs against them. Alternatively, chapters can also report PDUs on behalf of attendees via the Education Provider Portal.

10.3.1 Access to the Education Provider Portal

Only individuals designated as provider representatives are able to manage chapter courses in the Education Provider Portal. Chapter leaders must contact their regional chapter engagement team in order to be set up as a provider representative.



More detailed information and instructions on how to utilize the Education Provider Portal can be found within the Education Provider Portal User Guide.

10.3.2 What PDU Activities Should Be Entered in the CCR System?

All PDU activities offered by a chapter, regardless of the number of PDUs, should be entered in the CCR system via the Education Provider Portal. All chapter activities will be stored within CCRS to enable better tracking and reporting.

Consult the Education Provider Portal User Guide or contact your regional Chapter Engagement team for more details on adding courses and submitting PDUs on behalf of course attendees.

10.4 Corporate Training

Chapters should refrain from any form of corporate or commercial training. Chapters should refer interested companies and organizations to the Authorized Training Partner Program to learn more and/or locate an Authorized Training Partner (ATP) in your area. Chapters are encouraged to build collaborative relationships with the Authorized Training Providers (ATPs) within their local markets to support the needs of local companies and organizations. Please refer to Section 4.7 for more information about Chapter Alliance and Collaboration Policies.

10.5 Authorized Training Partner (ATP) Program

PMI chapters wishing to offer PMP® exam prep and/or PMI Disciplined Agile™ workshops and certification training for members are required to use an Authorized Training Partner to offer training or to join the Authorized Training Partner program.

All PMI chapters are required to adhere to all program requirements of PMI's ATP program. Program requirements for chapters include:

- Chapters who apply to the program will be subject to the same criteria for admission as non-chapter entities, and if accepted, will have the same benefits as all Authorized Training Partners.
- Chapters who are accepted into the program will need to select individuals to attend the required Train-the-Trainer session to become certified instructors if they plan to deliver PMP® exam prep training or Disciplined Agile™ workshops and certification training.
 - To avoid conflicts of interest, chapters that become Authorized Training Partners may not permit their chapter board members or those in a decision-making role within the chapter to serve as certified instructors, nor can they be the Authorized Training Partner owner.
 - Authorized Training Partner owners and certified instructors cannot serve as a chapter board member or a volunteer holding a decision-making role within the chapter while they are still an owner or certified instructor.



- Authorized Training Partner owners and certified instructors will confirm via a checkbox in the program application stating they and their employees, as well as their certified instructors are aware of this requirement, they are not serving as a chapter board member or volunteer holding a decision making role, and they will not volunteer as one while an owner or instructor.
- Chapters who are Authorized Training Partners cannot share their status with non-Authorized Training Partner chapters. For example, a chapter who is an Authorized Training Partner cannot select individuals from non-Authorized Training Partner chapters to become certified instructors for them.
- Disciplined Agile™ (DA) Authorized Training Partner owners and certified instructors may not serve as a Disciplined Agile chapter volunteer champion.

10.6 References

REFERENCE	LOCATION
Chapter Support Staff	Available from this link: https://www.pmi.org/leadership-central/contact-chapter-leaders
Continuing Certification Requirements (CCR) Handbook	Available from this link: https://www.pmi.org/certifications/certification-resources/maintain
PMI Talent Triangle® Guidelines	Available from the PMI Marketing Portal (https://marketing.pmi.org/) > Media Library > Certification > Talent Triangle You must have or request a Chapter Leader account.
Continuing Certification Requirements System (CCRS)	Available from this link: https://ccrs.pmi.org
Education Provider Portal	Available from this link: https://provider.pmi.org
Education Provider Portal User Guide	Available from this link: https://provider.pmi.org/resources
Authorized Training Partner (ATP) Program Page	Available from this link: https://www.pmi.org/learning/training-development/authorized-training-partners

11. Chapter Benefits and Recognition Policies

11.1 Chapter of the Year Awards Program

The Chapter of the Year Award Program honors PMI-chartered chapters making significant contributions to the project management profession and to the Institute through exemplary programs, products, and services.



Chapters must meet these criteria to prequalify for the PMI Chapter of the Year Award:

- Charter renewal submitted on time
- Chapter meets all "required criteria" as outlined in the annual Charter Renewal, Chapter Charter Agreement, and Catalog of Core Services
- Chapter is chartered for one or more calendar years
- Chapter is in good standing with the Project Management Institute (PMI) for the period covered by the nomination
- Two out of the following three criteria were met for the previous business year:
 - The chapter meets or exceeds average retention rates in the chapter's mentor region
 - The chapter meets or exceeds the average score for overall member satisfaction in the chapter's mentor region

The chapter meets or exceeds the average score for Chapter Recommendation Score (formerly known as Chapter Net Promoter Score) in the chapter's mentor region

All prequalified chapters will be invited to participate in an online survey to distinguish their accomplishments from other chapters in their region.

11.2 Chapter Leadership Impact Award

The PMI Chapter Leadership Impact Award is an annual award recognizing one outstanding chapter leader (chapter board member) per subregion (Regions 1-16) for their extraordinary and/or meritorious volunteer service to their chapter, subregion, or community.

The nominee must be:

- a current PMI chapter member in good standing.
- an elected or appointed Chapter board member registered in the Component System (CS) for a minimum of six months during award period.
- nominated by another Chapter board member from the same Chapter, their Region Mentor, or regional Chapter Engagement staff (self-nomination is not permitted).
- exhibit no conflict of interest (all PMI members and volunteers are bound to the PMI Code of Ethics and Professional Conduct).

11.3 Chapter Milestone Program

The PMI Chapter Milestone Program recognizes chapter tenure by providing a different gift every five years to all chapters in good standing, rewarding and encouraging chapters for their contribution to project management.



Recommended Milestone Gifts:

5 Years	Digital Badges + One of these items (Mugs, Pens, or Trophy) + PMInsight Recognition + Tree Planting
10 Years	Digital Badges + One of these items (Brandstand or Trophy) + PMInsight Recognition + Tree Planting
15 Years	Digital Badges + One of these items (Brandstand or Trophy) + PMInsight Recognition + Tree Planting
20 Years	Digital Badges + One of these items (Brandstand or Trophy) + PMInsight Recognition + Tree Planting
25 Years	Digital Badges + One of these items (Brandstand, Trophy, or Lapel Pins/Coins) + PMInsight Recognition + Tree Planting
*30 Years	Digital Badges + One of these items (Brandstand or Trophy, or Lapel Pins/Coins) + Managing Director or Regional Operations Manager Recorded Video + PMInsight Recognition + Tree Planting
*35 Years	Digital Badges + One of these items (Brandstand or Trophy, or Lapel Pins/Coins) + Managing Director or Regional Operations Manager Recorded Video + PMInsight Recognition + Tree Planting
*40 Years	Digital Badges + One of these items (Brandstand or Trophy, or Lapel Pins/Coins) + Senior Leadership Team member or PMI Board of Directors Recorded Video + PMInsight Recognition + Tree Planting
*45 Years	Digital Badges + One of these items (Brandstand or Trophy or Lapel Pins/Coins) + PMI CEO Recorded Video + PMInsight Recognition + Tree Planting
*50 Years	Digital Badges + One of these items (Brandstand or Trophy or Lapel Pins/Coins) + PMI CEO Recorded Video + PMInsight Recognition + Tree Planting

*Chapters at 30-plus years are eligible to request a live or virtual speaker (CEO/Senior Leadership Team/Board of Directors/Managing Director/ Regional Operations Manager). Chapters must submit the request through Speaking Engagement Request to review and approve it. All chapter requests are subject to the availability of the requested speaker.

11.4 Discount on PMI Book Orders

PMI chapters are eligible for a 55% reseller discount off the list price of PMI published titles. This is an organizational discount for the chapter and not an individual discount

for chapter leaders. Chapter leaders purchasing books for their individual use must pay the list price or PMI member price, where applicable.

11.4.1 Orders

Orders must be placed by a current chapter board member on behalf of the chapter.

- If ordering within North America, please contact the Independent Publishing Group (IPG) via <https://pmi.bookstore.ipgbook.com/>
 - Book orders to IPG may use a special promo code to receive the 55% discount; please contact your PMI chapter support staff to obtain a promo code for use during checkout.
- If ordering outside North America, please contact Eurospan.
 - Book orders to Eurospan may receive the 55% discount by using their special order form <https://books.eurospan.co.uk/p/4E8G-B4J/pmiatp>

Chapters may purchase books from other resellers such as Amazon and Eurospan; however, the promo code cannot be redeemed at other resellers.

11.4.2 Payment

On behalf of the PMI chapter, a current board member/officer must place the order to qualify for the discount and adhere to IPG payment methods and terms and conditions. If the chapter orders from other resellers, such as Amazon and Eurospan, the chapter must adhere to their payment methods and terms and conditions.

11.4.3 Returns

Purchasers are subject to the return policies of the specific reseller where the PMI titles are purchased. Please review these policies before purchasing the books.

11.5 Leadership Institute Meeting Registration Policy

PMI provides a set number of complimentary registrations to each chapter for their respective regional PMI® Leadership Institute Meeting (LIM). The complimentary registration is provided through the use of a special registration code that is sent to the president of the chapter.

The chapter president may designate the use of the complimentary registration for any chapter volunteer. It is the responsibility of the president to provide the code to the designated LIM attendee(s).

11.6 Chapter Speaker Hub

Chapter Speaker Hub aims to enhance the chapter membership value proposition by enabling chapter leaders to find and engage high-quality globally and regionally relevant event speakers. Speakers can be nominated by PMI Chapters, PMI Fellows, and the PMI Events and PM.com Teams following at least one successful speaking engagement at a PMI event.



11.7 Additional Support

PMI might execute additional support initiatives to PMI chapters during a set time frame, for example, event and virtual tool reimbursement program or negotiated discount on virtual platform service fees. Only chapters in good standing are eligible for these benefits.

11.8 References

REFERENCE	LOCATION
Volunteer Resource Hub	https://www.pmi.org/leadership-central/chapter-volunteer-resources

12. Chapter Conflict Management Policies*

12.1 Purpose of the Conflict Management Program

The purpose of the Conflict Management Program is to assist chapter leadership to quickly and fairly resolve any disputes that may arise between or among PMI chapters in good standing and/or chapter leaders and volunteers by providing guidance and resources. Addressing disputes early is beneficial to all involved.

The Conflict Management Program does not address disputes between PMI and a Chapter (or Chapters) relating to the interpretation of, or otherwise arising from the terms of, the Charter Agreement, but will follow the guidelines listed in the PMI Chapter Charter Agreement, Section 28, entitled Agreement Dispute Resolution.

12.2 Program Scope

The program applies to disputes between or amongst PMI chapters in good standing and/or chapter leaders and volunteers. Chapters agree to report those disputes that they would like recorded and/or that they cannot resolve themselves to the program for documentation and potential mediation.

12.3 Conflict Management Process

PMI Conflict Management Program promotes strategies to resolve conflicts at the earliest possible stage. It includes strategies to enhance trust building, effective communication, informal negotiation, and collaborative problem-solving.

The PMI Conflict Management Program provides for a multi-stage dispute management process consisting of

- (1) efforts by the parties to resolve the dispute themselves;
- (2) facilitation by a senior chapter board member;
- (3) PMI Chapter Engagement Team work together to facilitate/resolve the solution;



- (4) Mediation of the dispute by a PMI Volunteer trained in mediation and conflict resolution; and
- (5) Binding arbitration of the dispute.

12.4 Disputes Subject to Conflict Management

Disputes eligible for this Program include situations between volunteers involved in a disagreement or interaction that fosters an ongoing interaction of conflict between them. These conflicts usually have an impact on the volunteer’s ability to effectively execute their volunteer responsibilities, can impact other volunteers, or can impact the effectiveness of the chapter operations.

Ineligible disputes include, but are not limited to, those arising from any disagreements involving governing, policy, or procedure documents and the interpretation of the aforementioned documents, which should be resolved at the chapter level, with the chapter board having final authority. In addition, conflicts between the chapters and their individual members are out of scope of this program.

This program is not intended to resolve complaints regarding PMI or PMI team. Any such complaints are governed by the PMI Grievance Policy. Nor is the program intended to resolve any employment-related issues between the chapter and any of its employees, to the extent that the chapter has any employees.

12.5 Conflict Management Oversight

The Global Chapter Engagement team has overall responsibility for the Conflict Management Program including policy, program development, and evaluation. The Global Chapter Engagement team, with consultation from the PMI Legal Department, shall resolve any disputes regarding the interpretation and applicability of these procedures.

**As of October 2023, the Chapter Conflict Management Program is in a transition stage and being revised. The delivery of the revised program is expected Q4 2023.*

12.6 References

REFERENCE	LOCATION
PMI Conflict Resolution Program	Available in the Chapter Collaboration Platform under Documents > Resource Links > Leading the Chapter https://ccp.pmi.org/#/document/document/volunteerresources
Chapter Conflict Report Form	Available from this link: https://app.smartsheet.com/b/form/3615c31e1e6b4180934905cd7b56d45d
PMI Grievance Policy	Available from this link: https://www.pmi.org/-/media/pmi/documents/public/pdf/governance/grievance-policy.pdf



13. Chapter Probation Policies

13.1 Purpose of Probation

PMI chapters that do not meet performance standards or policy requirements may be placed on probation. The probation policy provides support and services to assist chapters before, during, and after a probationary period. PMI will guide chapter volunteer leaders and provide a structure in which chapter governance can be reinforced and supported and ensure the rights and benefits to the members are being met.

13.2 Reasons for Probation

Causes for probation include, but are not limited to:

- Failure to submit the annual PMI Chapter Charter Renewal and any supporting documentation such as taxes, financial documents, and annual plans, by the designated due date, following repeated attempts to support the chapter in meeting the annual filing requirement.
- Failure to meet minimum performance criteria and core services established by PMI within the PMI Chapter Charter Agreement.
- Failure to uphold PMI policy as outlined in the chapter's governing documents, PMI Chapter Charter Agreement, the PMI Policy Manual for PMI Chapters, and other applicable and published PMI policies.
- Failure to address noted concerns within provided time frames or participate in PMI's Conflict Resolution process.

Prior to probation, a chapter may be placed on a performance improvement plan (PIP).

13.3 Probation Measures

During probation:

- PMI may suspend promotion of the chapter through PMI publications and PMI website.
- Chapter leaders may be ineligible for the regional PMI® Leadership Institute Meeting (LIM) attendance support, including travel grants and complimentary registration.
- Chapter events including, but not limited to, training and professional development programs may not be promoted or communicated via PMI's CCRS program.
- The chapter will no longer receive special pricing, licensing terms, or other chapter benefits.



- PMI will revoke all access for chapter leaders to all PMI leadership portals including, but not limited to, the Component System, the chapter reporting system ThoughtSpot, Chapter Collaboration Platform (CCP) resources, Learning Management System (LMS), and will stop the delivery of PMInsight.
- The chapter will not be allowed to participate in any of the PMI Chapter Support or Recognition Programs including, but not limited to, the Chapter of the Year Awards, the Chapter Leadership Impact Award, the Chapter Guest Pass program, and speaker engagement requests.

13.4 Notification of Probation

PMI will prepare a chapter for probationary status by communicating the intent to initiate the probation period to the chapter board. The maximum duration of the probation period is one (1) year, with exceptions subject to approval by the regional Chapter Engagement manager.

The chapter board will receive an official notification letter of the probationary status. This notification letter will identify:

- The reason the chapter has been placed on probation
- Official notice that revocation of the charter may ensue if performance does not improve
- The actions required to remove probationary status

A chapter receiving this notice will be provided a designated time period to respond to the formal communication. If no response is offered, the chapter will automatically be placed on a predetermined probationary period.

13.5 Probation Outcomes

PMI will monitor the chapter, offering advice and assistance, during the probationary period. PMI regional chapter engagement team will attempt to contact the chapter president or board monthly, and schedule teleconferences and face-to-face visits, when possible.

Once the probationary period is completed, PMI will reevaluate the chapter's performance, and take one of the following actions:

- *Remove probationary status:* The chapter may retain its charter and return to a chapter-in-good-standing status.
- *Revoke charter:* The PMI chapter will lose its charter and will be required to dissolve as an organization affiliated with PMI. This final action will be taken when the inability to improve its performance exists. A letter will be sent from PMI to the chapter board informing them of this status, followed by a letter to all members of the organization indicating why such an action has been taken.

14. Chapter Dissolution Policies

14.1 Purpose of Chapter Dissolution

The decision to dissolve a chapter must be reflective of an inability of either the chapter or PMI to faithfully uphold their part in the charter agreement.

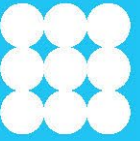
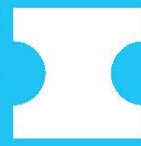
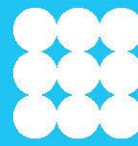
14.2 Process for Chapter Dissolution

A chapter must follow an organized process for dissolution under the direction and support of PMI. The reasons for dissolution may include:

The chapter has consistently demonstrated the inability to meet the minimum performance criteria as outlined in the charter agreement, despite good effort attempts to meet these requirements, for example:

- Failure to deliver core services
- Failure to provide clear chapter financial details
- Failure to maintain the key governance documents
- Failure to adhere to PMI approved, chapter approved Bylaws
- The current board officers are no longer interested or able to serve in their positions, and there is no interest from the chapter membership to take on the leadership of the chapter.

Dissolution may be initiated by the chapter or by PMI. Specific instructions, guidelines and procedures are outlined in the PMI Dissolution Process document maintained by the PMI Global Chapter Services Team.



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