

Policy Manual for PMI Chapters

LAST UPDATE: July 2024



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 May 2024 version.



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1. Welcome

Welcome to your volunteer role as a chapter leader! Volunteers are the lifeblood of Project Management Institute (“PMI” or the “Institute”), 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 Admin > OLC > Chapter Governance and 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 Global Chapter Programs 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 serve as the foundation for governing the internal affairs of a chapter, providing a framework for its operation and management. Well-crafted bylaws ensure clarity, consistency, and accountability among the chapter board of directors.

2.4.3 Tax Filings

If required by local tax authority, the chapter must file in its own legal name and make accurate, 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 region's chapter engagement team at least four to six weeks in advance of the election to arrange 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 Admin	https://chapteradmin.pmi.org/volunteerResources
PMI Code of Ethics and Professional Conduct	Available from www.PMI.org/CodeofEthics
PMI Strategic Plan	Chapter Volunteer Resource Hub > Essential Resources> PMI Strategy (https://www.pmi.org/leadership-central/chapter-volunteer-resources)
PMI Chapter Leader Guide: Financial	Chapter Volunteer Resource Hub > Essential Resources> Chapter Leaders Guides (https://www.pmi.org/leadership-central/chapter-volunteer-resources)



Management of PMI Chapters	Available from the PMI Marketing Portal (https://marketing.pmi.org/) > Media Library > Chapter Leaders Guide
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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

3.2.1. Establishment of Branches

Upon approval by PMI as stipulated in the Chapter Charter Agreement, the chapter may organize its members into groups, referred to as "Branches," to provide localized services. A chapter branch shall adhere to these Bylaws, the chapter's policies and procedures, and the charter with the parent organization.

3.2.2. Geographic Area

Each branch established to serve a designated geographic area shall operate solely within the boundaries defined by the Chapter.



3.2.3. Collection and Allocation of Dues

All dues and fees of the chapter shall be collected by PMI on behalf of the Chapter and remitted accordingly. The Chapter will distribute funds to the Branch in accordance with its policies and procedures. Branches are not authorized to establish separate membership structures or dues.

3.2.4. Branch Leadership

The Branch Chair must either be a member of the Chapter's Board of Directors or serve as a Committee Chair reporting to a Chapter Board member responsible for overseeing the Chapter's Branch(es).

3.2.5. Process for Establishing Chapters with Branches

A chapter chartered with the option for establishing branches will receive a Chapter Charter Agreement containing specific provisions governing branch creation, as well as authorities and limitations on branch operations and representation.

If the establishment of branches is deemed necessary, the chapter shall contact the region's chapter engagement team to initiate a defined reorganization process. Upon completion of this process and recognition as a Chapter with Branches, the Chapter will receive an updated Chapter Charter Agreement reflecting this structural change.

3.4.6. Limitations

Branches must adhere to the restrictions outlined in the Chapter's Charter agreement with PMI.

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 region's 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



considered to be in alignment when each of the services offered to its members, and other PMI members as applicable, is associated with a PMI Strategic Plan objective as described in the Catalog of Core Services. Core Services as described below must be provided to all chapter members in good standing. Additionally, chapters must make every reasonable effort to provide access to chapter offerings to members in good standing of other PMI chapters on the same terms and conditions as are provided to their own chapter members.

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 References

REFERENCE	LOCATION
Chapter Reorganization Handbook	Available in the Chapter Admin under > OLC > Chapter Governance & Policies > Chapter Formation and Reorganization Handbooks https://chapteradmin.pmi.org/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 Admin under OLC > Chapter Governance & Policies > Chapter Formation & Reorganization Handbooks https://chapteradmin.pmi.org/volunteerResources
Chapter Governance Document Hierarchy	<p>Chapter Governance Hierarchy</p> <pre> graph TD A[Local Incorporation-Non Profit Corporation Law Articles of Incorporation/Registration] --> B[PMI Charter Agreement] B --> C[Chapter Bylaws *Approved by PMI Prior to Member Ratification] C --> D[Chapter’s Policies/Procedures] D --> E[Policy Manual for PMI Chapters] </pre> <p><small>PMI</small></p>



4. Chapter Management and Charter Renewal Policies

4.1 Chapter Management and Charter Renewal Policy

Please navigate to the Chapter Volunteer Resource Hub > Governance. Please select the tile called ‘Chapter Management and Charter Renewal Policy’.

Chapter Volunteer Resource Hub: <https://www.pmi.org/leadership-central/chapter-volunteer-resources>

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 region’s chapter engagement team
Brand Governance and Guidelines	Available from the Chapter 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 any eligible PMI member who meets the qualifications for such chapter membership and who pays the applicable dues.

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 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.

Should the Chapter fall within the scope of a data protection regulation requiring a Data Processing Agreement and/or Model Clauses, Attachment D Attachment E, Attachment F and Attachment G are incorporated here by reference.

6.3 Membership and Prospect Database Information Policy

PMI chapter leaders have access to daily membership and membership prospect information from the PMI'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 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

Chapters may establish membership dues under policies and procedures established by PMI and consistently with the terms of the chapter charter. Membership dues help drive the costs of chapter operations, services, and activities and maintain the financial solvency of the chapter. Setting chapter dues should be part of the chapter's annual planning and budgeting process to ensure that the financial needs of the chapter in relationship to its value proposition are being met. All chapter membership dues are billed and collected by PMI and then distributed to the appropriate chapter in a timely manner.

7.2 Setting Dues

In accordance with Article VIII Section 2 of the chapter bylaws:

The annual membership dues will be agreed upon between PMI and the chapter's board of directors 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 establishing chapter dues or receiving 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.
- The chapter sets dues amounts for both regular and student members.

7.3 Changing Dues

The chapter will notify PMI to determine any dues changes prior and in advance for a 1 January start date. PMI requires 3-4 months' notice of a dues change. Any change to the Chapter Member dues shall be agreed upon in writing between the Chapter and PMI.



PMI Chapter President and Finance officer communicate to the Regional Managing Director and Regional Head of Community in the third quarter of each calendar year requesting any dues changes. Chapters must submit their changes by 31 August to take effect on 1 January. The proposed chapter dues changes are subject to PMI review and approval. 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 newly approved chapter dues amounts for the fiscal year that begins on 1 January.

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. 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.



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 region's 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 region's chapter engagement team 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 region’s 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 region's chapter engagement team.

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 ™ symbol (™) should appear after an unregistered mark that is used in connection with either goods or services. The ℠ 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 region’s chapter engagement team.

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 region’s chapter engagement team.

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)[®] certification

Certified 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.

The PMI Talent Triangle®

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.



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).
- 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 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 to PMI's copyright in the reproduction.

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 Admin under Resource Links > Leading the Chapter https://chapteradmin.pmi.org/resourceLinks
Contact Information: Region Chapter Engagement Team and Region Mentors	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

This form is only for articles from *PM Network* and *PMInsight* 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 *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, 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: _____

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 region’s chapter engagement team 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 refer to the Media/Press Participation Guidelines for PMI Volunteers, and 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 Admin under OLC > Directory of Technology Services https://chapteradmin.pmi.org/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



Media/Press Participation Guidelines for Volunteers	Available in the Chapter Volunteer Resource Hub under Marketing and Communication Resources https://www.pmi.org/leadership-central/chapter-volunteer-resources
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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.

10.3 Use of Logos to Promote PDU Events

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.

10.4 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.

10.4.1 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 region's 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.

10.4.2 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 region's chapter engagement team for more details on adding courses and submitting PDUs on behalf of course attendees.

10.5 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.

10.6 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.



10.7 References

REFERENCE	LOCATION
Contact Information: Region Chapter Engagement Team and Region Mentors	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 region’s chapter engagement team (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 + PMIInsight 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 + PMIInsight 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 + PMIInsight Recognition + Tree Planting
45 Years*	Digital Badges + One of these items (Brandstand or Trophy or Lapel Pins/Coins) + PMI CEO Recorded Video + PMIInsight Recognition + Tree Planting
50 Years*	Digital Badges + One of these items (Brandstand or Trophy or Lapel Pins/Coins) + PMI CEO Recorded Video + PMIInsight 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 region’s chapter engagement team 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
Chapter 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 Chapter Conflict Management Program is to assist chapter leadership to quickly and fairly resolve any disputes that may arise between PMI chapter volunteers or members.

Ineligible disputes include, but are not limited to:

1. 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 the scope of this program.
2. Complaints regarding PMI or the 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.
3. 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.

The Conflict Management Program does not address disputes between chapter board members or 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 members and/or volunteers who belong to a PMI chapter in good standing. 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.



12.6 References

REFERENCE	LOCATION
PMI Conflict Management Program	Available in the Chapter Admin under Resource Links > Leading the Chapter https://chapteradmin.pmi.org/resourceLinks
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 Admin 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 region's 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.

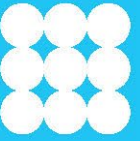
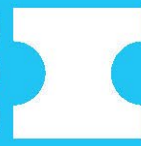
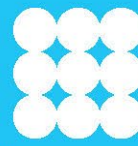
14.2 Process for Chapter Dissolution

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 Programs Team.



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