



Confidentiality and Records Compliance Agreement

For PMI Member and Non-Member Volunteers

I, _____, a PMI volunteer working on the PMI Volunteer Group identified as “_____,” recognize that I may or will become aware of information that is the confidential property of PMI. For the purposes of this agreement, any information, material or data that the organization considers and treats as confidential, sensitive or proprietary, and is not in the public real through due process of the organization, shall be defined as confidential, whether or not it is explicitly marked as such.

Information that is confidential, sensitive or proprietary my result from various activities and/or sources. This may include but is not limited to the examples listed in Section VI of the [PMI Confidentiality Policy](#).

Below are some confidential, sensitive, or proprietary information specific to this group/team:

I understand that, from the date of this agreement forward, I will abide by the PMI Confidentiality Policy and respect the confidential property of PMI and, within reasonable limits, personally protect that property from communication or other distribution to others and will not use such information for my own personal use or gain or the advantage of any other organization or entity unless such material is available publicly or unless PMI has granted me permission to disseminate it to others.

In support of PMI’s Records Management Program, I agree that I will destroy any information, material or data covered under this agreement within the immediate 60-day period following the expiration of my participation in the above activity, except for documents that I have been advised by PMI to retain for a longer period or documents that due to their sensitive nature I have been asked to return to the Institute, which I will do within the time required.

Signature: _____

Date: _____

Name (please print): _____

Note that typing your name on the electronic signature line is not sufficient if you are returning your form via e-mail – a copy of your electronic signature needs to be affixed to the form. However, it is sufficient to create an electronic signature by typing your name and adding your PMI membership or User ID number immediately after your name (for verification purposes). By placing your electronic signature on this document you agree to be bound by its terms.

Please read the [PMI Confidentiality Policy](#) and the [Volunteer Records Management Policy](#) located on [PMI.org](#) before completing and signing this form. Completed forms should be returned to your Volunteer Engagement Liaison (VEL).