

Component Data Exchange Program (DEP): Membership and Prospect Database Information Policy

Each month, PMI component leaders receive updated membership and prospect information from the Institute's database via the Data Exchange Program (DEP).

For component membership management purposes this information includes:

- A listing of all current members of the component;
- All financial transactions related to the component's memberships that have been created during the current month;
- A listing of component members who have not renewed their PMI and/or component memberships with the last month;
- A change listing which reports membership database changes that have occurred in the previous month; and
- A change list summary that provides a numerical summary of all changes that have occurred in the previous month.

For component recruitment and promotion purposes this information includes:

- A listing of PMI members who are eligible to belong to the component (e.g., in the Chapter's geographic area, work in a SIG's industry area, or focus on a College's knowledge area) but have not yet joined; and,
- A listing of prospective members who are eligible to belong to the component once they have joined PMI (e.g., in the Chapter's geographic area, work in a SIG's industry area, or focus on a College's knowledge area).

This information is vital for component leaders to communicate with and track their existing members while also reaching out to potential members. Using this information also has important implications for members and prospective members who may want to know about component activities but who do not want their contact information widely distributed.

These policies have been established to clarify questions regarding the use of the Membership and Prospect Database information by components. The Membership and Prospect Database includes information provided through the DEP, as well as through other means (e.g., electronic communications or hard copy).

1. Member Notice and Consent Regarding Use of Application Information

Every member who joins PMI is required to submit a completed application form with payment of all applicable dues and fees. The information collected on that form is designed to assist PMI and components in serving their members and members are notified of this 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 components so that they also honor members' requests to be excluded from designated items.

2. Monthly Membership and Prospect Database Listings for Components

PMI charters components to further the purposes of the Institute. Component membership is open to, and limited to, any eligible PMI member who meets the qualifications for such component membership and who pays applicable component dues. Membership in any component is voluntary, and members may join as many components as they wish. In order to join a component, an individual must be a member of PMI.

Components may establish membership dues at their discretion and under policies and procedures established by PMI. All component membership dues are billed and collected by PMI GOC and then distributed to the appropriate component in a timely manner.

PMI GOC provides monthly Membership and Prospect Database listings to help Components:

- Track and communicate with their members;
- Account for membership dues disbursed from PMI to the components; and,
- Recruit and retain members for the component.

Examples of appropriate uses of the Membership and Prospect Database include, but are not limited to:

- Component meeting announcements;
- Component new member welcome letters;
- Component membership renewal “thank you” letters;
- Component newsletters and other membership communications; and,
- Component election ballots.

Components should take into consideration that members may not want the contact information they provide to be listed or posted in electronic format without the members’ 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:

- Component membership directories in hardcopy format
- Member contact information on component web sites.

Whenever components publish membership directories – whether in hardcopy format or online – a disclaimer similar to the following should be incorporated:

Warning! This list is for official PMI [Component 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, electronic or mechanical, photocopying or using the names, addresses, e-mail addresses and phone numbers for any private, commercial or political mailing is strictly prohibited.

Components should also make sure that their publications are copyright protected consistent with the laws of the country in which the component is incorporated/registered.

Examples of uses which are not appropriate include but are not limited to:

- The sale or release of Membership and Prospect Database listings and/or information to any third party (except in accordance with Sections 4 and 5 of this policy), and
- The use of mailing lists by component 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.

Components are expected to take appropriate measures to ensure that members who requested to be excluded from mailings, directories and other communications are not included in those activities and that all future requests to opt-out of receiving such communications will be honored. Components will keep accurate records of member preferences to ensure the proper administration of all opt-out requests.

Components with questions regarding the appropriate use of Membership and Prospect Database listings and information should contact the PMI GOC Component & Community Relations Department for technical assistance in advance of the proposed activity.

3. Privacy Issues

PMI Components should investigate whether the jurisdiction in which they are incorporated/registered has other specific privacy protections that may relate to the use and publication of membership and prospect information. Since there is the potential for significant variations in such requirements, component leaders should investigate the regulations within their specific jurisdictions.

4. List Exchanges among Components

PMI Components may exchange Membership and Prospect Database listings with other PMI Components to promote component-sponsored activities consistent with Section 2 of this policy. Any lists exchanged among components should exclude those members who have asked that their contact information not be shared.

5. List Exchanges with Other Organizations

PMI Components may exchange membership listings only with other organizations with which the components have established collaborative relationships, provided the following conditions are met:

- Prior to its acceptance and execution of a cooperative agreement or other formal relationship with a non-PMI entity, the component shall employ a fair process for full and open exchange and communication with PMI GOC. Minimally, components should address the following issues:

- The agreement between the component and the non-PMI entity clearly states the terms and conditions related to the use of PMI-related membership listings.
- Component 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 component nor of PMI must be excluded from such exchanges. Prospect information is provided solely for component recruitment efforts.

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

6. Sale of Lists to Third Parties

Components 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.

7. Mailing List Rentals for Members Outside of the Component's Designated Area

Components may rent from PMI the mailing list for PMI members who are outside of the component's designated geographic, industry, interest or knowledge area and whose names are not included in the Membership and Prospect Database listing provided to the component by PMI. Such mailing list rentals may only be used for specific purposes, such as promoting component educational events. Requests for mailing list rentals should be directed to the PMI Supplier Relations department.

8. 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 component may be used only in connection with the authorized, lawful business of the component, consistent with the terms of the component's charter with PMI. Such information is considered confidential and shall not be shared with or distributed to individuals or business entities outside of PMI, except with the prior, written permission of the PMI Chief Executive Officer.

9. Confidential Information

Components shall maintain the confidentiality of any and all of PMI's confidential, sensitive or proprietary information or data (collectively, "confidential information"). Such confidential information remains the property of PMI and is furnished to the component in confidence and solely in connection with the component's affiliated relationship with PMI. Upon termination of its affiliation with PMI for any reason, the component will immediately deliver to PMI all written or electronically stored documentation, including copies of, or concerning, confidential information, and shall make no further use of such confidential information and shall make reasonable efforts to ensure that no further use is made by the component or its representatives of such confidential information. The component's confidentiality obligations shall survive the expiration or termination of its affiliation with PMI.