	Volunteer Records Management Policy
Policy Level: 2 Effective Date: December 2008	Revision Date: October 2015 Last Review Date: May 2020
Accountable: President and CEO	Responsible: Manager, Volunteer Programs and Services

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1. Purpose

To ensure that all Project Management Institute (PMI) Records and non-Records created during the course of volunteer service are being managed in accordance with PMI's Records Management Program.

2. Policy Statement

This policy provides guidelines for members of the PMI Board of Directors, Board Support Committees, Task and Project Teams, Insight Teams, Individual Contributors and other PMI volunteers (collectively referred to as "Volunteer(s)") for the management and disposition of PMI Records and Convenience Copies of those Records that are created in the course of their PMI volunteer activities, whether paper or electronic, to ensure that official Records have been submitted to PMI and all copies have been destroyed in accordance with PMI's Records Management Program.

2.1 Volunteer Responsibility

(a) All Volunteers shall sign the PMI Confidentiality and PMI Records Compliance Agreement prior to commencing participation in the Volunteer's activities.

(b) All Volunteers must take reasonable steps to protect and safeguard all Records and copies of those Records in their possession while they are working in their capacity as a PMI Volunteer.

(c) No later than sixty (60) days after their role as a Volunteer ends, the Volunteer should destroy all Convenience Copies of Records that are in his/her possession. To the extent that the Volunteer has an original Record, those Records should be returned to the Sponsor/Support Staff.

(d) Upon completion of the requirements of subsection (c) above, the Volunteer should complete the PMI Records Compliance Certification provided to him/her by the Sponsor/Support Staff.

2.2 Role of the Sponsors/Support Staff

(a) Sponsors/Support Staff are responsible for ensuring that each Volunteer submits a Confidentiality and Records Compliance Agreement prior to participation and a Records Compliance Certification form after their participation ends.

(b) Sponsors/Support Staff must ensure that all original PMI Records are returned to their respective sponsors and all convenience copies are to be destroyed no later than sixty (60) days after participation has ended.

(c) Sponsors/Support Staff will ensure that all forms are submitted in a timely fashion and retained in accordance with the Records Retention Schedule.

3. Policy Distribution

Internal: All PMI volunteer Sponsors/Support Staff

External: PMI Volunteers

Persons affected by this program include all PMI volunteer Sponsors/Support Staff and all volunteers and members serving on the PMI Board of Directors, Board Support Committees, Task and Project Teams, Insight Teams, as Individual Contributors or in any other volunteer capacities with PMI.

Volunteer Sponsors/Support Staff are responsible for ensuring that the activities of their respective Volunteers are documented, all related Records are in possession of PMI and that all other related materials have been destroyed in accordance with PMI's Records Management Program.

4.   Related Documents

Related procedures, forms, and other support documents enforce, maintain, and verify policy compliance. These procedures and forms support this policy:

Document Name	Document Type (Procedure, Form, User Guide, etc.)
Records Management Policy for Staff	Policy
PMI Confidentiality and Records Compliance Agreement	Form
PMI Records Compliance Certification	Form

5.   Revision History

Changes to this policy are made as necessary under the direction of the preparers and approvers. The change log describes new topics and other changes.

Action (Creation, Revision, Review)	Effective Date	Changes/Approvals
Created	December 2008	
Revision	January 2010	Updated to new template
Revision	October 2015	Responsible Party changed from VP & General Counsel to Manager, Volunteer Programs and Services
Revision	May 2020	Template update; minor revisions

6.   Glossary

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

Term	Definition
Convenience Copy	A copy of a Record that is not the Official Copy. Convenience copies are temporary copies of Records that are retained for convenience or reference purposes only. Convenience copies can be destroyed at any time, but they must not be retained for longer than the period set for the Official Copy.
Document Hold	Initiated by the General Counsel, a Document Hold is the suspension of any destruction requirements established for PMI Records as a result of existing of impending litigation or investigation.
Non-Records	Non-Records are items that are not subject to the Records Management Program or its procedures. Examples include library materials kept for reference purposes, junk mail, unsolicited brochures, unsolicited e-mails that have no business value, information from Internet list services, personal papers that do not relate to the employee's duties, surplus inventory of annual reports, bulletins, handbooks, blank forms, etc.
Record	Any document, information or data, electronic as well as paper, created or received in connection with the transaction of PMI business, regardless of media.
Sponsor/Support Staff	The individual or department within PMI's structure that has been assigned responsibility to sponsor or support the Volunteer's activities.