



## Agreement Form

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This mentoring program is sponsored by the Chicagoland Chapter of PMI and is designed to enhance the professional experience and development of the participants. Participation is strictly voluntary and without financial compensation. Please read the following guidelines regarding participation in the mentoring program. Your signature at the bottom of this agreement signifies your acceptance of the terms and conditions that govern participation in the program.

1. The duration of the formal mentoring relationship between participants in the program is for a period of six months. Mentor and Mentee agree to actively participate in the program for the full duration of their engagement.
2. Mentor and Mentee agree to be available, responsive to each other's needs, and willing to adjust schedules as necessary in order to achieve the minimum number of contact hours described below.
3. As part of the PMI-Chicagoland Mentoring Program, Mentor and Mentee agree to establish "live contact" for a **minimum of two (2) contact hours each month. Four (4) contact hours each month is advised.** It is recommended that the minimum contact hours be spread across and composed of (at least) **two** separate and distinct sessions each month. Live contact, as it is defined for this program, includes (and may not be limited to): face-to-face meetings, telephone conversations, video conferences video conferences, voice-only conference calls, e-mail, Voice-over-Internet conversations, or online chats, video, or live messaging via the Internet. Virtual contact is defined as email, online chats, live messaging via the internet.  
**(Note: Though any and all forms of communication between Mentor and Mentee are encouraged, it is recommended that e-mail and other virtual communication methods not be used as the exclusive communications tool between Mentor and Mentee, but rather as a support process for other forms of direct communication.)**
4. Participants are responsible for completing the necessary paperwork associated with the program prior to the initial contact with their "partner" (Mentor or Mentee).
5. Information shared between the participants within the context of the formal mentoring relationship is considered to be confidential and should not be shared outside the relationship without expressed permission from the other participant(s).
6. An individual pairing of Mentor and Mentee may prove to be unworkable or unsatisfactory to either/both participants. In this case either participant (or both) may request a different "partner" pairing during the relationship. The Director of Mentoring will address and resolve the pairing as quickly as possible, with no fault assigned to either party.
7. A Mentor's role is limited to the furnishing of opinions, guidance, advice and suggestions. Mentees should take all information given by a Mentor under advisement in making personal, professional, and career decisions.
8. It is the responsibility of the Mentor to ensure that all opinions, guidance, advice and suggestions provided as part of the formal mentoring relationship, are accurate to the best of their knowledge and do not recommend or suggest course(s) of actions for the Mentee that could be construed as illegal, unethical or immoral.
9. Participants accept responsibility for any costs incurred as part of the formal relationship, including, but not limited to: postage, telephone calls, travel, meals, conference/seminar registration, etc.
10. Individuals are permitted to take part in the **PMI-Chicagoland Mentoring Program(s)** upon acknowledgment and acceptance of these terms and conditions as indicated by their signature below.

11. Participant is a current member of the PMI-Chicagoland Chapter (with dues current).
12. The Chicagoland Chapter of PMI provides this mentoring service to our members with the understanding that using the service provides no guarantees regarding the Mentee's future either in terms of promotability, or employability. Neither does this process attempt to train the Mentee for PMP Certification. The Chapter sincerely hopes that the Mentee's prospects are enhanced by this process, but those outcomes are still the responsibility of the Mentee and not the Mentor or the Chicagoland Chapter.
13. **Mentees:** During discussions of problems with a Mentor, it is natural for you to describe situations that occur at work. If you decide to use this service we ask that you be aware during these discussions, that you must not inadvertently disclose information that is proprietary to your company, or whose knowledge outside of that company, might cause the company either embarrassment or even loss of revenue. It is incumbent on you not to let that happen! While it may be difficult to discuss such problems with your Mentor at such a generic level, please do your best.
14. **Mentors:** During discussions with your Mentees, they will sometimes wish to discuss problems or concerns at their workplace. Please do not discuss these problems in a manner where the specific nature of the problem provides you with either that company's proprietary information, or status of projects that could cause either embarrassment or loss of revenue for that company. While it is understood that an experienced project manager will be able to determine some information concerning both the project and the company, you must discourage your Mentee from continuing further. You must also treat anything you hear as though it were your own proprietary information.

Please bear in mind that Mentors are volunteers and are not experts or paid consultants. Mentors, the PMI-Chicagoland Chapter and the Project Management Institute are not responsible for business, career, personal or other decisions made as a result of the mentoring relationship. Mentors give only advice and/or information from their experience, perspective, etc. Mentors do not make decisions for Mentees. PMI®, the PMI-Chicagoland Chapter, and Mentors do not accept any responsibility for decisions made by Mentees.

**By entering into the mentoring program, the participants agree that neither PMI, the PMI - Chicagoland Chapter, nor other participants has any liability for the guidance, suggestions and/or advice provided to them during the formal relationship.**

Participant Name: (Please Print) \_\_\_\_\_

Date: \_\_\_\_\_

Participant Signature: \_\_\_\_\_

Please print, sign and bring this completed form to the next Mentoring Program Meeting to confirm your participation in the program. Alternatively, you may electronically send a scanned version of the document with your signature to the Director of Mentoring at [DirMentoring@pmi-chicagoland.org](mailto:DirMentoring@pmi-chicagoland.org).



**PROJECT MANAGEMENT INSTITUTE,  
CHICAGOLAND CHAPTER, INC.  
CORE PM MENTORING PROGRAM  
CONFIDENTIALITY POLICY and AGREEMENT**

**To protect the privacy of the individuals participating in the PMI Chicagoland Mentoring Program and its Extensions ("Core PM Mentoring Program"), the PMI Chicagoland Chapter Board of Directors and Executive Officers ("PMI Chicagoland Leadership") has formulated the following Confidentiality Policy and Agreement for its Core PM Mentoring Program. All persons who have or may have access to PMI Chicagoland Mentoring information (see "Confidential Mentoring Information" defined below) or who have or may have interaction with a Core PM Mentoring Program Participant, shall affirm, in writing, this policy, thereby agreeing to it.**

- A. Any person who has or may have access to the Confidential Mentoring Information shall be subject to the conditions of this confidentiality policy and agreement. Confidential Mentoring Information includes all information provided by a Core PM Mentoring Program Participant, whether provided verbally or in written form, including, but not limited to, applications, resumes, mentoring reports made by both Mentors and Participants, development plans, surveys, feedback, personal information (including names), employer and employment information, and all other information received during the Mentoring process.
- B. By signing this agreement, the undersigned party acknowledges, understands and accepts the conditions of this confidentiality policy and agreement.
- C. This policy covers any and all access to or contact with written and oral information relating to a current, former, prospective or future Core PM Mentoring Program Participant or Core PM Mentoring Volunteer of the Chicagoland Chapter. However, PMI Chicagoland Leadership is cognizant that Core PM Mentoring Program Participants and Volunteers often form personal or business relationships and, therefore, this policy is not intended to include information which was received by the undersigned directly from a Core PM Mentoring Program Participant. This policy shall also not cover otherwise Confidential Mentoring Information that
  - a. is or becomes generally available to the public, other than as a result of a disclosure by the undersigned or any of the undersigned's Representatives in violation of this Policy and Agreement; or
  - b. is either
    - i. known to the undersigned prior to undersigned's association with the Core PM Mentoring Program or independently discovered by the undersigned, or
    - ii. becomes available to the undersigned on a non-confidential basis from a source other than the Core PM Mentoring Program or any other PMI Chicagoland source; provided that the source was not prohibited by any legal, contractual, or fiduciary obligation to the Core PM Mentoring Program or any third party from disclosing the Confidential Mentoring Information.
- D. All Confidential Mentoring Information shall be kept strictly confidential.
- E. Confidential Mentoring Information shall not be used, sold, marketed, or disclosed for any purpose other than official PMI or Chicagoland Chapter purposes or purposes authorized in writing by the Mentoring Director or PMI Chicagoland Leadership. Use of Confidential Mentoring Information for any other purpose is prohibited.
- F. No copies (electronic or paper) shall be made of Confidential Mentoring Information except as authorized by the Mentoring Director or PMI Chicagoland Leadership. All copies (electronic or paper) shall remain the property of PMI Chicagoland and shall be promptly returned to the Mentoring Director or PMI Chicagoland Leadership once the possessor is no longer in a position to require access to Confidential Mentoring Information or upon request of the Mentoring Director or PMI Chicagoland Leadership.
- G. These obligations shall continue following the termination of access and shall not end.
- H. The undersigned acknowledges that a failure to follow this policy and agreement could cause damage to PMI's and the Chicagoland Chapter's reputations or the reputation of a Mentoring Program Participant. Since it is not possible to correct the harm to a reputation by suing for money damages, all persons with access to Confidential Mentoring Information shall agree that PMI and/or the Chicagoland Chapter and/or a Mentoring Program Participant have the right to obtain a court order requiring the undersigned to follow the policy and agreement. PMI's and/or the Chicagoland Chapter's and/or the Mentoring Program Participant's right to prevent disclosure through an injunction is in addition to all other rights and remedies that are available to it and does not exclude possible other legal or equitable action.

I have read the foregoing policy and hereby agree to protect the privacy of the Mentoring Program Participants and the reputations of PMI, its Chicagoland Chapter and the Mentoring Program Participants and agree to the provisions of this policy.

Participant Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

Participant Signature: \_\_\_\_\_

Please print, sign and bring this completed form to the next Mentoring Program Meeting. Alternatively, you may electronically send a scanned version of the document with your signature to the Director of Mentoring at [DirMentoring@pmi-chicagoland.org](mailto:DirMentoring@pmi-chicagoland.org).