	<b>LEVEL 3 INSTITUTE POLICY:</b> <b>CEO authors, approves and monitors</b>	<b>No.:</b>
		<b>Date Approved:</b> 1/18/2007
		<b>Rev No.:</b> 3
<b>POLICY TITLE:</b>	<b>Providing Hyperlinks to Research Surveys from the PMI Web Site</b>	<b>Rev Date:</b> 4/9/2007
		<b>Page:</b> 1 of 4
<b>RESPONSIBILITY OF:</b>	Research Coordinator	
<b>PREPARED BY:</b> Eva Goldman and Jean Marie Martin, PMI Research Coordinators		<b>APPROVED BY:</b> Edwin J. Andrews, VMD, Ph.D., PMI Research Manager

**I. POLICY STATEMENT:**

The temporary creation on the PMI Web site of hyperlinks to surveys being conducted by third parties is covered by this policy. The Research Manager, with the help and advice of a member advisory group, will select such linkages. Criteria and conditions for the selection are described below.

**II. PURPOSE:**

The purpose of this policy is to clearly describe the selection criteria, the conditions and procedure for temporarily creating the survey links. The policy, procedure and guidelines are developed to ensure uniform and equitable evaluation of requests and to ensure value for all the stakeholders in the process, to include the surveyor, PMI and its membership.

**III. DESIRED RESULTS/OBJECTIVES:**

A fair, uniform and equitable process to qualify survey links to be temporarily created on the PMI Web site.

**IV. DEFINITIONS: N/A**

**V. POLICY DISSEMINATION:**

**Internal:** N/A

**External:** Survey reports will be posted on the PMI Web site, Research section, under Survey Results.

**VI RESPONSIBILITIES: As described in Section VIII below.**


**1) GUIDELINES:**

The survey must be judged as research useful to the advancement of the project management body of knowledge and related topics and specifically not be seen as purely motivated by commercial gain. It should have clearly worded non-offensive content.

The surveyor agrees to not utilize any means to capture the email address or other contact information of volunteers partaking in the survey without the express consent of any such individual. The use of automatic technologies such as cookies to capture and/or collect personal information is prohibited.

The surveyor agrees to the conditions in the PMI [Electronic Systems & Communications Policy](#)

The surveyor agrees to make the findings from the survey available to the PMI membership within thirty days of the completion of the analysis, preferably through a document posted in PDF format.

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The surveyor agrees to allow PMI to add questions to the survey as part of an ongoing study if one is in progress at the time the survey request is being made. The option, if they do not agree, is to wait until the PMI study is completed.

PMI is not responsible for the content or quality of the survey but will make a decision to accept or reject linking to a survey based on a review of the content.

The PMI is not responsible for the experience the volunteer survey participant may have once he/she leaves the PMI web site.

## 2) PROCEDURES:


1. The survey will be submitted electronically or by hard copy to the Research Manager of the PMI, along with the URL (Universal Resource Location on the World Wide Web), if present, of the survey.
2. The Research Department and two members of the Research Program Member Advisory Group will evaluate the survey. The reviewers will make a consensus decision to which there is no appeal process beyond clarifying what may have been a misunderstanding.
3. The surveyor will receive and sign an agreement to make the survey findings available to the PMI membership as described above and confirm that he/she has agreed, if asked, to include questions from the PMI in the survey.
4. Surveys will generally be posted on the Web site of the surveyor. A link will be created from the PMI Web site to the survey within 30 days of approval, receipt of signed agreement and confirmation of the URL, for a period of no more than 60 days. It will be unlinked sooner if the surveyor and the PMI site administrator agree that the survey participation has dropped to a sufficiently low level that continued linking is without substantial value.

## IX. SUPPORTING DOCUMENTATION: see Appendix A below.

### Appendix A

#### **PMI Research Survey Links Process – revised 1/18/2007**

The following instructions are intended to help survey administrators go through the PMI Research Survey Links process efficiently. It may take up to 30 days after approval before the link is posted.

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1. Submit the survey electronically as an attachment (preferably in MS Word or text format) and as a Web address (URL — Universal Resource Location) in an e-mail to the Research site administrator at [PMI research coordinator](#). If there is difficulty in sending the document as an e-mail attachment, a hard copy is acceptable, postal mailed to the attention of the Research Coordinator at PMI, Four Campus Boulevard, Newtown Square, Pennsylvania 19073-3299 USA.


According to accepted practice, potential respondents must be given certain information before they make the decision to respond. Therefore, the following items must accompany the initial submission of the survey before it becomes eligible for review:

- a. A brief introduction of the researcher. A short statement, like “a graduate student from Ohio University” or “a researcher from NASA” is sufficient.
- b. Who is the survey sponsor? An educational institution or business? Someone else?
- c. A clear statement of what is being sought, often called the Research Question.
- d. An introduction of the survey: Why is it being undertaken? Who benefits, and how? And – most important to PMI Research – What is the relationship between the survey and project management?
- e. A confidentiality statement (this reassures the respondent that the researcher/research team will not divulge any personal information that may be inadvertently given through the process).
- f. Proof of any required ethics clearance.
- g. A statement about what was done to pre-test the survey.

Some of this information (mainly from items a-d) may be used to advertise the survey, once approved. Researchers should also place it on either the home page of the survey or a pre-entrance page.

2. Read the Survey Link Guidelines and the Survey Link Agreement, print and sign the Agreement, and postal mail the signed Agreement to the address above. An electronic signature is also acceptable, provided it was created from your actual handwriting, if you wish to scan and e-mail the signed Agreement. Both the Guidelines and the Agreement are Adobe Acrobat (PDF) documents, to be found at <http://www.pmi.org/GetInvolved/Pages/How-to-Post.aspx>.

3. The Research Manager and two members of the Research Program Member Advisory Group (Research Program Team) will evaluate the survey. PMI may or may not have questions for you

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to answer before we post the link, and may have questions for you to add to your survey while it is linked to the PMI site.

4. The link will be posted within 30 days of PMI Research Program Team approval and receipt of the signed agreement from you, for a period of no more than 60 days. The length, if shorter than that, will be decided between the Surveyor and the PMI site administrator based on level of survey participation.

5. Submit the Report for Posting

As stated in the Survey Link Agreement, a report on results and conclusions drawn from the survey is expected thirty days after the survey link period is over. The following guidance is offered for your benefit and convenience:

- a. Format. PDF is preferred, with pass code security that protects against content change.
- b. Content Order. Title page, copyright notice and contact information such as an e-mail address, table of contents, executive summary of the project, and results & conclusions – reports will be expected to have a minimum of 10 pages. If the report is being extracted from a larger work, such as a thesis or dissertation, only the chapters including the above information should be included.