

III. PMI Registered Education Provider Criteria and Responsibilities

This section of the application is the contract between the R.E.P. organization and PMI. By signing and submitting the acceptance of terms at the end of this section, you agree to comply with the Criteria and Responsibilities.

The applicant is required to submit documentation to support the application, indicating that the applicant meets the criteria and responsibilities of the R.E.P. Program found below. See Section 2: R.E.P. Quality Review for instructions on submitting the documents needed for your in-depth review.

1. R.E.P. Criterion 1: Organizational Responsibilities

Guiding Principle: *Participants in the PMI R.E.P. Program shall have the requisite resources, facilities, and administrative support to effectively participate in the Program, including the ability to comply with all Provider responsibilities and procedures.*

- 1.1 The Provider shall be in compliance with all applicable laws and requirements. A division, department, unit or role shall exist within the Provider organization that is responsible for administration of the required R.E.P. reports, documentation, and communications.
 - 1.1.1 The Provider shall have been in operation as a viable project management educational provider for a minimum of one calendar year preceding the time of application.
 - 1.1.2 The Provider shall have a designated division, department, unit or person that is responsible for administration of R.E.P. functions.
 - 1.1.3 The Provider shall have a clearly worded mission statement and/or strategic objectives that reflect a commitment towards excellence in project management education.
 - 1.1.4 The Provider shall provide attendees/participants with appropriate documentation (such as Certificate of Completion, Letter of Attendance, etc.) upon successful completion of each registered course. PMP certified participants in your registered courses will be able to claim Category 3 PDUs.
 - 1.1.5 The Provider shall ensure that attendance/participation records are maintained for a minimum of one calendar year after completion of a course or product offering or as required by applicable law.
 - 1.1.6 The Provider shall accurately represent the scope and quality of their services and products to prospective clients, PMI staff and the public.
 - 1.1.7 The Provider shall conduct all educational and business operations in an ethical, professional and lawful manner, and respect the rights and worth of all educational program participants.

- 1.1.8 The Provider shall refrain from any manner of discrimination with respect to the programs provided under this Agreement, including, but not limited to, discrimination on the basis of race or ethnic origin, gender, nationality, disability, religion or sexual orientation.
- 1.1.9 The Provider agrees that the Commonwealth of Pennsylvania, USA shall be the exclusive jurisdiction for any and all disputes arising out of this agreement and/or the Provider's participation in the R.E.P. program.

2. R.E.P. Criterion 2: Course or Educational Product Development and Content

Guiding Principle: *To ensure that high quality project management courses are being offered for Category Three Professional Development Units (PDUs), appropriate Knowledge Experts shall develop and/or review all course content prior to delivery to the general public.*

- 2.1 Alignment to *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*: The content of courses or educational products offered for PDU credit shall be substantially consistent with the concepts and terminology found in the most current edition of the *PMBOK® Guide*. Project management theories or practices different from those described in the *PMBOK® Guide* are permissible in course materials but shall be clearly identified as such to course participants.
 - 2.1.1 Courses can be acceptable in the following ways:
 - Course content fully aligns with the *PMBOK® Guide*.
 - Course content substantially aligns with the *PMBOK® Guide* and differences are noted.
 - Course content offers project management concepts that are alternative to the *PMBOK® Guide*, and denotes these differences.
 - Course content does not directly address *PMBOK® Guide* Knowledge Areas but covers general management skills that directly support project management professional development.

- 2.2 Instructional designers/developers of registered courses or educational products shall be qualified by demonstrable expertise in the requisite field. Expertise may be demonstrated by such qualifications as formal education, experience, or other recognized credentials appropriate to the subject matter.
- 2.3 Subject matter experts involved in the content development of registered courses or educational products shall be qualified by demonstrable expertise in the requisite field. Expertise may be demonstrated by such qualifications as formal education, experience, PMP or other recognized credentials appropriate to the subject matter.
- 2.4 The registered course(s) should be designed around clearly identified, measurable learning objectives. Course material should be clearly worded and arranged in a logical manner that facilitates achievement of the learning objectives.
- 2.5 A course outline/syllabus and all relevant course materials for the course(s) submitted for review shall be provided with this application. All course materials shall follow the outline/syllabus in a clear and logical manner.
- 2.6 At least one PMP, other than the primary author, shall review and approve the complete content of courses registered under the R.E.P. Program or offered for PDU credits.
- 2.7 Providers must abide by applicable intellectual property law as well as the terms and restrictions for use of PMI trademarks and copyrighted material as found in the most current R.E.P. Manual.

3. R.E.P. Criterion 3: Course or Educational Product Delivery and Instructor Evaluation

Guiding Principle: *To ensure that identified learning objectives will be met, appropriate instructional delivery methods shall be chosen for the course. In addition, course instructors shall be chosen based on proven expertise in the field, and their ability to facilitate learning.*

The Provider shall:

- 3.1 Have processes in place to select qualified instructors and ensure instructional effectiveness.
- 3.2 Use instructional methods and learning resources appropriate to facilitate achievement of the intended learning objectives.
- 3.3 Ensure that instructors of courses intended for PDU credits possess the PMP credential or at least one of the following qualifications: formal education, experience, or other recognized credential appropriate for the subject matter.

- 3.4 Ensure that all courses specifically intended to prepare candidates for the PMP Examination shall be taught by instructors holding the PMP credential.

4. R.E.P. Criterion 4: Awarding of Professional Development Units (PDUs)

Guiding Principle: *To ensure that participants are awarded the appropriate number of Professional Development Units (PDUs) upon completion of a course, and that assignment of PDUs is uniform throughout the R.E.P. Program, PDU values of courses shall be assigned based on industry-accepted methods of contact hour equivalencies.*

- 4.1 The Provider shall calculate the PDU value of each course or educational product delivered via traditional or nontraditional/distance learning instructional methodologies using the currently accepted industry methods of contact hour equivalencies listed below.
 - 4.1.1 Courses delivered via traditional face-to-face methodology shall be assigned one PDU for each contact hour of instructional interaction. One (1.0) PDU is issued for every contact hour of a planned, structured learning activity. Increments of 0.25 PDU may be awarded after the first full hour of learning. No PDUs are to be assigned for extended (>30 minutes) breaks, including lunch breaks.
 - 4.1.2 For courses already approved for Continuing Education Units (CEUs) as administered by the International Association of Continuing Education and Training (IACET), one (1) CEU equates to ten (10) PDUs.
 - 4.1.3 Courses delivered via nontraditional means (i.e., Web-based synchronous or asynchronous Web instruction, video conference, audio conference, audio/video tape, or interactive CD-ROM) shall be assigned PDUs based on the average time in hours needed to complete the course by a minimum of 10 sample participants. Alternative methods of PDU assignment may be approved on a case-by-case basis.
- 4.2 Each course offered for Category Three (3) PDUs must be registered in the PMI R.E.P. Database.

5. R.E.P. Criterion 5: Course Evaluation and Improvement

Guiding Principle: *To ensure that courses being offered under the R.E.P. Program meet participant expectations and achieve their stated Learning Objectives, Providers shall have a process in place for continuously improving their courses based on student evaluations, external audits, or other monitoring methods.*

- 5.1 All courses intended for PDU credit shall be evaluated via course evaluation forms or other means to measure the degree of success in meeting learning objectives.
- 5.2 Feedback from course evaluations shall be used to continuously improve courses.
- 5.3 A substantial change of 25% or more of course content requires resubmission of a new course for approval.

6. R.E.P. Criterion 6: R.E.P. Marketing Representations

Guiding Principle: *To ensure that Providers act in an honest, ethical and professional manner in their dealings with PMI and the public and that the relationship between PMI and the Provider is accurately and unambiguously represented to the public, Providers shall strictly adhere to the R.E.P. marketing guidelines as delineated by PMI.*

- 6.1 The Provider may only use PMI approved R.E.P. logos and marketing statements when representing itself as a PMI R.E.P. to customers, potential customers, or the general public. Furthermore, PMI recognition of R.E.P. organizations is intended solely for use in conjunction with registered courses or educational products being offered for PDU credit and must not be inferred as recognition for other business activities of the Provider. The Provider shall:
 - 6.1.1 Only use the approved R.E.P. logos and marketing statements as found in the most current R.E.P. Manual.
 - 6.1.2 Accurately represent the scope and quality of their services and products to prospective clients, PMI staff and the public (See also Criterion 1.1.6).
 - 6.1.3 Warrant that it will, at all times, act in an honest, ethical and professional manner both in its dealing with PMI and with the general public
 - 6.1.4 Make no statements or representations indicating or implying, in any manner, that PMI has accredited, certified, sponsored, endorsed, or guaranteed any of the Provider’s products, publications or services. The following statement is authorized by PMI for use in connection with the PMI Registered Educational Provider Program: “[Name of Company] has been reviewed and approved as a provider of project management training by the

Project Management Institute (PMI).” The Provider may also state the following: “As a PMI Registered Education Provider (R.E.P.), [Name of Company] has agreed to abide by PMI established quality assurance criteria.”

- 6.1.5 Comply with all applicable laws and PMI policies regarding the use of PMI and third-party intellectual property, including, but not limited to the following: “Use PMI, trade, service, or certification marks only to refer to, or describe, PMI, PMI Components or programs, or the PMP Credential Program, or as otherwise specifically authorized by the Agreement.”
- 6.1.6 Include proper notice of PMI ownership of its copyrights, trade, service or certification marks with all uses of such copyrights and marks as instructed by the most current R.E.P. Manual.
- 6.1.7 Be prohibited from using any PMI trade, service or certification mark in any domain name, e-mail account or company name.
- 6.2 In order to ensure the integrity of PMI’s credentialing programs and the value of PMI credentials to its customers, the Provider shall abide by PMI’s advertising policies in advertising its registered courses or educational products, both in their advertisements in PMI publications and in the statements in Provider’s own marketing materials, regarding Provider’s registered courses and educational products. The PMI Advertising Policies are posted to the PMI website at www.pmi.org.

IV. PMI R.E.P. Program Benefits

Below please find a listing of R.E.P. Program benefits enjoyed by all R.E.P. Organizations (Provider, Global Provider, Internal Training Provider, Cooperating Organization Provider and PMI Component Provider). PMI Global Providers enjoy additional benefits, described on the next page:

1. Permission to publicize your organization as a PMI approved Registered Education Provider (see section 6.1.4).
2. License to use the official PMI R.E.P. logo appropriately in promotional and course materials consistent with program policies as outlined in the most recent version of the R.E.P. Manual.
3. Posting of your “Provider Profile” and other organizational information on the searchable provider database found on the R.E.P. area of the PMI website.
4. Posting of registered courses in the searchable course database found on the R.E.P. area of the PMI website.
5. Web links directly to Provider’s website from the searchable R.E.P. Provider Directory and the R.E.P. database of PMI R.E.P. courses.
6. Receipt of the “R.E.P. Monthly Update” e-newsletter.
7. Exclusive access to requests for proposals (RFP) from organizations seeking project management training.
8. PMI sponsored advertising of the R.E.P. Program (in general) in select trade/professional publications.
9. Access to the R.E.P. Online Community Site, for updated information on PMI sponsored events, breaking news, and other timely information.
10. R.E.P.’s receive a 25% discount below PMI Member rates for PMI articles/papers ordered through the PMI James R. Snyder Center for Project Management Knowledge & Wisdom. Additionally receive in-depth member-level reference services in all PMI Publications.
11. A 40% discount on most PMI publications purchased through the PMI Bookstore.
12. Limited license to reproduce material from the most recent version of the *PMBOK® Guide* in Provider’s courses according to the specifics noted in the box to the right.
13. Linking to the PMI home page (www.pmi.org). Registered Education Providers (R.E.P.) are permitted, and indeed encouraged, to link to the PMI home page and agree to the terms and conditions listed on the next page. No other linking to the PMI website (i.e., deeper pages into the site) is permitted.

Guidelines for Licensing

GRANT OF LICENSE

Contingent upon the Provider’s acceptance of the terms and conditions set forth herein, PMI hereby grants licensee a limited use, nonexclusive, nontransferable license (the “License”) solely to reproduce 15 figures and five excerpts from the most current edition of PMI’s copyrighted *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* and to reproduce definitions from the PMBOK Guide Glossary (herein “Licensed Material”) for use and inclusion in its course offerings.

DEFINITIONS

Licensed Material: consists of fifteen (15) figures and five (5) excerpts from the most current edition of PMI’s copyrighted *PMBOK® Guide* and all definitions from the *PMBOK® Guide* Glossary.

Excerpt: a direct quote from a PMI publication that is, in general, no longer than 600 words. Excerpts DO NOT include accompanying figures, graphs, or illustrations.

TERMS / RESTRICTIONS

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- b. Permission is granted to use a maximum of fifteen (15) figures and five (5) excerpts from the most current edition of the most current edition of PMI’s copyrighted *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* and any or all of the definitions from the *PMBOK® Guide* Glossary in Provider’s courses only. Permission to use additional material must be requested separately.
- c. Except as otherwise provided above, Provider may not share or distribute the licensed material to any third parties, without the prior express written consent of PMI. Permitted use does not include the right to grant others permission to photocopy or otherwise reproduce the material except for versions of the work created by non-profit organizations for use by visually or physically handicapped persons.
- d. Appropriate credit to PMI’s copyrighted material must appear on every copy of the work, either on the first page of the quoted text or in the figure legend as follows:

“Project Management Institute, *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* – (insert current edition title. For example: Third Edition), Project Management Institute, Inc., (insert year of copyrighted edition. For example: 2004). Copyright and all rights reserved. Material from this publication has been reproduced with the permission of PMI.

RESERVATION OF RIGHTS

PMI reserves all rights to publish and use, and to license others to publish and use, the licensed material and any portion thereof, in any manner whatsoever and in any location without restriction.

INFRINGEMENT

Provider shall promptly notify PMI of any infringement or unauthorized use of the Licensed Material by a third party, any claim that the Licensed Material infringes upon the intellectual property rights of a third party, or any act of unfair competition by third parties relating to the Licensed Material, whenever Provider becomes aware of such an act or claim. Provider shall cooperate with PMI at PMI’s expense to prevent and stop such infringement or act and if so requested by PMI, shall join with PMI as a party to any legal case or action brought by PMI for such purpose. PMI shall have full control over any such case or action, including, without limitation, the right to choose if, when, and where to initiate any case or action, and to select counsel or to settle on any terms PMI deems advisable. PMI shall bear all expenses connected with such legal case or action, except that if Provider wishes to retain its own legal counsel, Provider shall do so at its own and sole expense.

Terms and Conditions Affecting Web Links from R.E.P.s to PMI:

1. **Proper Form of Link:** R.E.P.s are permitted to link to PMI’s home page using one of the following forms: the name “Project Management Institute,” the initials “PMI” or the PMI logo.
2. **No Misrepresentations:** R.E.P.s will not place PMI web pages in a “frame” within its own website without specific written permission from PMI.
3. **No Negative References:** R.E.P.s may not make negative or disparaging references to PMI, its services or its members to otherwise compare PMI, its services or its members unfavorably to others.
4. **No Objectionable Content:** R.E.P.s’ websites must not contain, or link to, content that may be interpreted as libelous, obscene, or criminal, or which may infringe or violate any third party rights.
5. **Protection of Marks:** R.E.P.s may not use PMI names, marks or other materials in a manner that is likely to cause confusion with another source or to dilute or damage the reputation or image of PMI.
6. **Proper Use of PMI Logo:** R.E.P.’s use of the PMI logo for linking purposes will conform in all respects to the logo usage guidelines. The PMI logo may only be used as a link to the PMI home page and not to link to any other portion of the PMI website. Contact the PMI Brand Development Department at PMI Global Operations Center to obtain a copy of the guidelines before establishing the link.
7. **Indemnification:** PMI shall have no responsibility or liability for any content appearing on the R.E.P.’s website. R.E.P. agrees to indemnify and defend PMI against all claims arising out of or based upon its website.
8. **Right to Revoke:** PMI reserves the right at any time and in its sole discretion to revoke the right and request that the R.E.P. remove from its website any link(s) to the PMI website.

Amendment to Terms and Conditions: PMI reserves the right to amend these linking terms and conditions at any time. By continuing to link to the PMI website, R.E.P. agrees to abide by the linking terms and conditions then current, as well as other legal terms of use and conditions on the PMI website, as amended from time to time.

Additional Benefits for Global Providers

Organizations that enroll at the “Global Provider” level are entitled to the following additional benefits of enrollment:

1. Opportunity to register and advertise an unlimited number of qualified courses in the R.E.P. course database, posted on the PMI website.
2. Registration of your organization’s first “additional office” with no additional fee. A \$100.00 (US) value.
3. An annual report of learning needs and trends extracted from PMI Member and Customer Surveys.
4. One registration to R.E.P. networking events associated with the PMI Global Congress—North America.
5. Posting of your organization’s logo on the R.E.P. Profile.

Process for posting the R.E.P. organization logo:

- a. The organization logo should be converted to an “image file,” and titled with the Provider’s 4 digit ID Number (For example: 2000.jpg or 2000.gif). The logos should be 250 pixels in width and 75 pixels in height.
- b. Send a copy of the image file electronically to repsupport@pmi.org