

Authorized Training Partner Program General Organizational Requirements and Responsibilities

Criterion 1

Participants in the PMI® Authorized Training Partner Program (PMI ATP Program) shall acquaint themselves with all Program requirements and shall have the requisite experience, resources, facilities, and administrative support to effectively participate in the Program, including the ability to comply with all ATP responsibilities and procedures. ATP status is awarded only to high quality professional training and development providers who meet all Program requirements, and are aligned to PMI core values. PMI reserves the right in its sole discretion to deny or revoke admission to the Program to any applicant who does not meet Program requirements, for non-compliance with Program rules and criteria, for actions that could constitute a violation of applicable law or PMI's Code of Ethics and Professional Conduct, or for any other reason that, in PMI's judgement, could adversely affect the credibility or integrity of the Program.

Each ATP organization acknowledges and agrees that it is subject to the following:

- a. An ATP must have been actively engaged in a professional development training business for no less than three (3) years as of the date of application. Organizations that have three (3) or more years of business activities dedicated to examination preparation training are preferred.
- b. ATPs must demonstrate financial stability meeting PMI requirements. PMI will perform an evaluation of the ATP organization at the time of application that will include without limitation evaluation of the organization's Dun & Bradstreet report. Applicants to the PMI ATP Program are required to provide the organizations' EIN and Duns numbers, as well as other business information, as requested.
- c. ATPs will be and remain in compliance with all applicable laws and requirements while in the Program.

d. ATP organizations must have a division, department, unit or role that is responsible for administration of the required ATP reports, documentation, and communications. Information about these key roles and their responsibilities can be found in the Authorized Training Partner Guide.

e. ATPs will have a clearly worded mission statement and strategic objectives.

f. ATPs will provide attendees/participants in their training programs with appropriate documentation (such as certificates of completion, letters of attendance, etc.) upon successful completion of each course.

g. ATPs will ensure that attendance/participation records are kept for a minimum of two calendar years after completion.

h. ATPs will refrain from any form of misrepresentation or dissemination of misleading or inaccurate information with respect to PMI, any PMI examination, the ATP organization itself, the ATP organization's employees, and any course or program provided to the public. In particular, an ATP will not state that enrollees in its courses are "guaranteed" to pass any examination.

i. ATPs will refrain from any manner of discrimination or harassment of enrollees and applicants for training with respect to the training programs they provide, including, but not limited to, discrimination or harassment on the basis of race or ethnic origin, gender, nationality, disability, veteran status, religion or sexual orientation.

j. Unless prohibited by legal restrictions that apply to certain governmental entities outside of Pennsylvania, the ATP agrees that the Commonwealth of Pennsylvania, USA, shall be the exclusive jurisdiction for any disputes arising out of this Application and Agreement and/or the ATP's participation in the PMI ATP Program. ATPs that are government entities may receive a waiver of this requirement upon submission of written request for waiver with accompanying explanation and proof of the need for waiver.

k. ATP agrees that it will: (a) use only the authorized PMP® Exam Prep Training Materials provided by PMI to prepare candidates for the PMP® examination, (b) participate in required train-the-trainer instruction to train to prepare candidates for the PMP® examination, (c) utilize the Program digital platform as instructed, (d) pay per candidate fees set by PMI. An may add its own supplemental materials to the PMP® Training Materials to provide enhanced instruction to PMP® examination candidates if there is no conflict in the ATP's materials with the PMI Licensed Materials. PMI reserves the right in its sole discretion to request review of PMP® Training Materials.

I. ATP's supplemental materials have been added and to approve, reject or require modifications for use of such additional supplemental materials. For more information on all these requirements, see Program handbook

ATPs are not permitted to identify as an ATP any subsidiary, related or affiliated entity, nor any contractor or sub-contractor that has not been awarded ATP status by PMI, and must take reasonable steps to prevent any and all such entities from misrepresenting such status. This requirement includes without limitation prohibiting such entities from using the PMI® Authorized Training Partner Seal (PMI ATP Seal) and reporting any violations of this requirement to PMI.

Criterion 2

Only authorized PMP® Certification Exam Prep Training Materials provided by PMI are permitted to be used for PMP® Certification examination preparation. ATPs may, however, develop and use their own materials for project management-related courses that are offered for professional development and to meet certification maintenance requirements for Professional Development Units (PDUs) as described below:

- a. PDUs must be of high quality and aligned to the PMI Talent Triangle®. Appropriate knowledge experts shall develop and/or review all course content prior to delivery to the general public.
- b. PDUs must align with the most recent edition of A Guide to the Project Management Body of Knowledge (PMBOK® Guide) and other appropriate PMI global standards and guides. The content of courses or educational products offered for PDU credit must be substantially consistent with the concepts and terminology found in the current edition of the PMBOK® Guide and aligned to at least one section of the PMI Talent Triangle®. 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.
- c. Instructional designers/developers for PDU courses shall have appropriate qualifications to develop effectively all courses, including the requisite formal education, experience, or other recognized credentials appropriate to the subject matter.
- d. Subject matter experts involved in PDU content development shall have such qualifications as formal education, experience, PMI credentials or other recognized credentials appropriate to the subject matter.

- e. PDU courses must be designed around clearly identified, measurable learning outcomes. Material should be clearly worded and arranged in a logical manner that facilitates achievement of the learning objectives.
- f. All course materials shall have, and instructors must follow, an outline/syllabus that is organized in a clear and logical manner.
- g. With respect to all PDU content and other training materials, ATPs must abide by applicable intellectual property law as well as the terms and restrictions for use of PMI trademarks and copyrighted material as stated in this Application and Agreement and as found in the most current Authorized Training Partner Intellectual Property Quick Reference Guide on the Authorized Training Partner Resources web page.

Criterion 3

To ensure that identified learning objectives will be met, PMI requires that ATP training personnel have the requisite experience, hold an active PMP® certification themselves, have Agile project experience, and receive and complete authorized Train-the-Trainer instruction for PMP® examination preparation courses. Appropriate instructional delivery methods must be used for all other courses as well. In addition, all instructors should be chosen based on their proven expertise in the field and ability to facilitate learning.

ATPs must:

- a. Work with PMI to ensure that all instructors who provide PMP® examination preparation training hold an active PMP® credential and Agile project experience themselves, and receive authorized Train-the-Trainer training for PMP® examination preparation courses.
- b. Have processes in place to select qualified instructors and ensure instructional effectiveness for all courses.
- c. Use instructional methods and learning resources appropriate to achievement of the learning objectives.
- d. Ensure that instructors possess all of the following qualifications: PMI credential, Agile Project experience, formal education, experience, or other recognized credential appropriate for the subject matter.
- e. Ensure that all instructors affiliated with the ATP receive a badge issued by an authorized PMI badging vendor verifying that they have completed the Train-the-

Trainer session provided by PMI and are authorized to provide PMP® Exam Prep Training.

Criterion 4

To ensure that participants are awarded the appropriate number of PDUs upon completion of a course, and that assignment of PDUs is uniform throughout the Authorized Training Partner Program, the following requirements apply:

- a. The ATP will calculate the PDU value of each course or educational product delivered via classroom or distance learning instructional methodologies using current industry methods of contact hour equivalencies listed below.
 - i. Courses delivered shall be assigned one PDU for each contact hour of instructional interaction. One PDU is issued for every contact hour of a planned, structured learning activity.
 - ii. No course pre-work or homework assignments may be eligible for PDUs.
 - iii. Courses must align to at least one segment of the PMI Talent Triangle®.
 - iv. PDUs may be awarded in increments as small as 0.25 PDU.
 - v. Courses delivered on demand shall be assigned PDUs based on the average time (in hours) needed to complete the course by a minimum of 20 sample participants. PMI reserves the right to audit any course in which the PDU total conflicts with the time spent in a structured learning environment. In the instance an audit occurs the ATP must produce an electronically generated/time stamped verification document showing the amount of time 20 students took to complete the course.
 - vi. If a student is taking an on demand online course, the ATP must obtain and be able to show to PMI a time-stamped document that shows how long each student was in the course.
- b. Courses providing PDUs must be listed in the CCRS directory.
- c. If PDUs assigned to a course by the ATP do not match the time a student is confirmed to have been in the online learning environment, the ATP will be subject to removal from the Program.

Criterion 5

To ensure that courses for PDU credit being offered under the ATP Program meet student expectations and achieve their stated learning objectives, ATPs shall have a process in place for continuously improving their courses based on student evaluations, external audits, course changes or other monitoring methods. ATPs must abide by the following requirements with respect to course submission, evaluation, maintenance and improvement:

- a. A course number is one course/event. Since students cannot submit multiple claims against a single activity number, ATPs may not create a single activity with multiple courses. Courses over 35 PDUs entered in CCRS appearing to be more than one unit of study will not be allowed.
- b. Course listings in CCRS Directory shall be current at all times with the content contained within their courses.
- c. No course will be allowed in CCRS that accounts for a total cycle's worth of a credential holder's PDUs. The purpose of this requirement is for credential holders to continuously enhance skills over the 3-year cycle period.
- d. ATPs should submit batch PDU claims for students. When a batch claim is submitted, the course survey goes out to the students.

Criterion 6

ATPs must adhere to the following PMI ATP Program marketing guidelines to ensure that the ATP acts in an honest, ethical, and professional manner, and avoids any misleading statements about courses or results achieved from enrollment, and to ensure the relationship between PMI and the ATP is accurately represented to the public. ATPs must seek to ensure that their designation as ATPs, and use of the PMI ATP Seal and ATP number are used only in appropriate ways consistent with Program guidelines and only by ATPs themselves. ATPs agree as follows:

- a. The PMI ATP Seal* may be used only in conjunction with authorized PMP® Exam Prep Training Materials and PDU courses in CCRS. The PMI ATP Seal cannot be used with other organizations' certification courses, by organizations affiliated with the ATP who are not ATPs or on any third party platforms.
- b. ATPs are NOT permitted to offer the PMP® examination preparation training via Massive Open Online Courses (MOOCs). ATPs further are NOT permitted to display the PMI ATP Seal or the PMI Logo on a MOOC website to market or advertise the PMP® examination preparation course.

c. ATPs will act in an honest, ethical and professional manner both in its dealing with PMI and public. ATPs must:

- i. Accurately represent the scope and quality of their offerings to prospective and enrolled students, PMI staff, and public.
- ii. Use the words "organization has been reviewed and approved by the PMI® Authorized Training Partner Program *". Never use "accredited", "certified", "sponsored", "endorsed", or "guaranteed" by the PMI® Authorized Training Partner Program or PMI.
- iii. 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 current Authorized Training Partner Intellectual Property Quick Reference Guide
- iv. Refrain from using any PMI logo, trade, service or certification mark in any domain name, e-mail account or company name. If there is any doubt about such usage, the ATP should consult with the designated PMI ATP Program contact person at PMI to obtain direction.
- v. Abide by PMI's advertising policies when advertising offerings. PMI Advertising Policy within the Authorized Training Partner Program Resources.

**Approved logos and marketing statements can be found in the Authorized Training Partner Intellectual Property Quick Reference Guide*

Criterion 7

ATPs commit to best practices regarding their use of PMI content in accordance with the unique License granted to ATPs and the requirements of this Application and Agreement. In addition to acceptance of the terms of the License granted to the ATP upon acceptance into the Program, ATP agrees that:

- a. PMI owns all right, title and interest in the PMI Licensed Material and the PMP® Exam Prep Training Materials and reserves all rights to publish and use, and to license others to publish and use, the PMI Licensed Material and the PMP® Exam Prep Training Materials and any portion thereof, in any manner whatsoever and in any location without restriction. The PMP® Exam Prep Training Materials, and any rights not explicitly granted to ATP in the PMI Licensed Material or the PMP® Exam Prep Training Materials are reserved to and shall remain with PMI (or its successors or assigns).

- b. ATP shall promptly notify PMI of any infringement or unauthorized use of the PMI Licensed Material or PMP® Training Materials by a third party, any claim that the PMI Licensed Material or PMP® Training Materials infringe upon the intellectual property rights of a third party, or any act of unfair competition by third parties relating to the PMI Licensed Material or PMP® Training Materials, whenever ATP becomes aware of such an act or claim.
- c. To the extent that the PMI Licensed Material incorporated into activities or activity materials made available to students by an ATP via the internet, the ATP agrees that neither PMI Licensed Material nor PMP® Exam Prep Training Materials will be displayed on a website accessible to the general public. All PMP® Exam Prep Training Materials and ATP online courses containing PMI Licensed Material must be posted to password protected areas of the ATP website.
- d. Appropriate credit to PMI's copyrighted material must be provided, either on the first page of the quoted text or in the figure legend in the format as follows: "Project Management Institute, [Insert title of PMI Licensed Material or PMI PMP® Exam Prep Training Material], Copyright 2020. Copyright and all rights reserved. Material from this publication has been reproduced with the permission of PMI."

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