



Registered Education Provider (R.E.P.) Program

Quality Review

QUICK REFERENCE GUIDE

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1. The Quality Review Overview

Introduction

To sustain the quality of the R.E.P. program, PMI conducts quality reviews of each R.E.P. regarding its organizational business structure, operational processes, training practices, and use of PMI Intellectual Property (IP). This information is reviewed against published quality assurance criteria by both R.E.P. Support and an independent, third-party, R.E.P. Quality Reviewer.

The quality review is performed at the time of the organization's initial application (initial), and at the end of each three-year cycle renewal period (cycle renewal). An organization must pass the quality review before its R.E.P. status is initially granted or renewed. R.E.P. status is based on a 12-month enrollment period. R.E.P. status is effective from the PMI-designated enrollment period until the date of the organization's required renewal, provided the organization remains in good standing during this period.

The process for both types of quality reviews (initial and cycle renewal) is nearly identical. The applicant must fill out a new application and submit course work and the required supporting documentation each time their organization is reviewed. The scope and depth of the feedback provided by the Quality Reviewer is also identical for initial and cycle renewal quality reviews.

Target Audience

This document was created for new and existing R.E.P.s. in order to provide information regarding the R.E.P. Quality Review process.

Your Feedback

During the quality review process, or after you have completed a quality review, PMI invites you to complete this [Quality Review Feedback Survey](#). This short survey will assist us in making improvements to the quality review process.

Quality Review Value Proposition

To the R.E.P.

R.E.P. applicants can embrace the quality review as a way to continuously drive their organization toward excellence in training development and delivery. According to the 2015 R.E.P. Benchmark Report, the majority of R.E.P.s feel their clients require or prefer that their organizations are an R.E.P. The Quality Review ensures that program members are continually meeting the ever-evolving rigor and diligence of the R.E.P. Program quality standards.

To the Students and Customers served by R.E.P.s

Quality review criteria provide a framework to assist an organization in adhering to quality education and training practices. As a result, project management practitioners and students of R.E.P.s receive quality educational services for their investment.

To PMI

Industry standards continually evolve. Quality review criteria are complementary to PMI's internal training practices as well as generally accepted practices in training. The quality review ensures that quality of R.E.P. offerings is current and consistent for all program participants.

In summary, the value proposition for the PMI R.E.P. Quality Review is an experienced, PMI-paid third party who evaluates course materials and the organization's ongoing ability to deliver a quality education experience.

The Quality Review Team

PMI's team of 23 Quality Reviewers is located around the globe and performs reviews remotely. Quality Reviewers are neither PMI volunteers nor PMI employees. They are paid, part-time contractors. Based on the recommendations by the R.E.P. Advisory Group and the R.E.P. Program Team, PMI established the following qualifications for Quality Reviewers:

- Possess a current PMP® credential
- Possess a good understanding of PMI standards
- Have significant training and/or instructional design experience
- Sign a non-disclosure agreement
- Do not currently work for an R.E.P. or teach project management for an R.E.P. in any capacity

Quality Reviewers are accountable to the Lead Quality Reviewer, who in turn, is accountable to the Manager, R.E.P. Program.

Assignments

Reviews are assigned to Quality Reviewers according to the application's region, language(s), and course content.

Duration of a Typical Quality Review

PMI prefers that reviews be completed in fewer than four weeks; however, there are instances when a review may require additional time. When this occurs, firm but attainable mutually agreed-upon deadlines with the applicant may be set and must be upheld.

The organization will be assessed based on the information submitted with the application. Submission of an incomplete application and failure to meet deadlines will likely result in an unsuccessful quality review.

Confidentiality & Application Materials

PMI R.E.P. Quality Reviewers are legally bound to maintain the confidentiality of all application materials. They may not work for an R.E.P. or teach project management for an R.E.P. in any capacity. All Quality Reviewers must sign a non-disclosure agreement.

Quality Reviewers may not keep R.E.P. application materials (provider's course(s) and administrative submissions) on their personal computers after the review is complete and must delete them 30 days after completing a review.

When a review is complete, Quality Reviewers return all R.E.P. material to R.E.P. Support. In the event a second review is assigned, corrected or adjusted materials are provided to the second Quality Reviewer in order to verify that the initial issues were corrected.

PMI retains applications and supporting documents for a minimum of five years following a review.

2. Quality Review Resources

R.E.P. Advisory Group

The R.E.P. program relies on guidance from the volunteer members of the R.E.P. Advisory Group. Advisors are R.E.P.s who apply their professional knowledge and expertise to counsel and guide the strategic and operational components of the R.E.P. program. Advisors function in an advisory role and do not serve in an authority or approval role. The R.E.P. Advisory Group reports to the Manager - R.E.P. Program.

Advisors represent a range of R.E.P. types. The Manager - R.E.P. Program appoints R.E.P. Advisory Group members based on defined criteria and an application process. Each R.E.P. Advisory Group member serves a maximum three-year term. Please see the [R.E.P. Advisory Group Charter](#) for more information, and learn more about the R.E.P. Advisory Group [here](#).

R.E.P. Lead Quality Reviewer

The R.E.P. Lead Quality Reviewer is a PMI Global Operations Center (GOC) employee. The Lead Quality Reviewer leads the quality review team to perform the quality review operations for the R.E.P. program in an efficient, accurate, and timely manner. This individual continuously improves processes, tools, and resources to enable applicants to navigate the quality review process while elevating the quality of the program. The customer service aspect of this role addresses the quality review needs of applicants and resolves disputes relative to quality review outcomes, including course quality.

R.E.P. Quality Reviewers report to the Lead Quality Reviewer. The Lead Quality Reviewer has the final determination in status of all reviews.

R.E.P. Support

R.E.P. Support consists of application-processing personnel located at PMI's GOC and at the Asia Pacific Service Center located in Singapore. Their primary functions include interfacing with and supporting R.E.P. applicants prior to entering the R.E.P. Program, and during their involvement as program participants.

Email: repsupport@pmi.org

Phone: 610-356-4600 Option 8 (This extension is for customer care, who will connect you to R.E.P. Support.)

Please add the R.E.P. Support email address to your email contacts to enable receipt of correspondence from PMI. This will avoid PMI correspondence being sent to SPAM filters, or other email security filters.

R.E.P. Support Asia/Pacific

R.E.P. Support Asia/Pacific consists of application processing personnel located in Singapore. Their function is identical to R.E.P. Support at GOC, and serve the Asia/Pacific region only.

Email: repsupport-asiapac@pmi.org

Phone: +65 6496 5501

3. The Quality Review Process

Initial R.E.P. applicants and cycle renewal R.E.P.s are required to submit specific documentation to PMI as part of the quality review. Documentation includes, but is not limited to: organizational business structure, operational practices, procedures for course development, course materials, and marketing materials including website information. The application materials are reviewed against quality assurance criteria as found in Section 2 of the R.E.P. Application and Agreement.

The quality review process is conducted remotely, via e-mail, telephone, and occasionally video web conferencing between the Quality Reviewer and the applying organization's Primary Administrative Contact. If the Primary Administrative Contact requires a web conference, this must be specified to R.E.P. Support before entering the quality review to ensure that the Quality Reviewer has the capability to do so.

PMI does not perform a quality review on every activity (Course/Event) that an R.E.P. offers. PMI reviews one activity per course delivery method. A course delivery method may be a Classroom Course (CC); a Conference (CF); a Distance Learning Course (DL); or a Licensed Course (LC) from another R.E.P. or non-R.E.P., with certain restrictions.

The Quality Reviewer reviews the applicant's submission and may need to ask for additional information or clarification on items that are incomplete or raise questions during the review process. It is up to the Quality Reviewer's discretion on whether or not additional clarification is needed. The applicant is not permitted to adjust content of course materials. The only changes to course materials that will be accepted are changes required to comply with PMI's Intellectual Property (IP) Guidelines.

Examples of changes that are out-of-scope for the quality review include, but are not limited to:

- Adding content to course materials to cover additional topics or knowledge areas
- Creating learning objectives or assessments to insert in course materials to comply with R.E.P. guidelines
- Updating content to align with a current edition of the *PMBOK® Guide*

Examples of changes that are in-scope for the quality review include, but are not limited to:

- Elaborating on instructors' experience and qualifications if not specifically mentioned in submission
- Adding the R.E.P. number, or other required field, to a course certificate of completion
- Inserting registration marks and attribution statements on a website
- Re-calculating PDUs to reflect PMI's PDU policy
- Removing the acronym "PMP" or "BOK" from an applicant's web domain or email address

Special considerations include but are not limited to:

- Applicants are not permitted to remove PMI IP to reduce their financial obligations to PMI by complying with the parameters of the Basic Level IP License. Removal of PMI IP affects the integrity of the instructional design of a course.

Part 1 – Internal Review and Reviewer Assignment

1. R.E.P. Support receives material from applicant

The quality review process begins when the R.E.P. applicant's full payment, application, and required documentation have been received and processed by R.E.P. Support.

2. R.E.P. Support alerts Lead Quality Reviewer (Lead QR), "application ready for review"

R.E.P. Support emails the Lead QR with information about the review including the organization name, language(s), whether it is an initial or renewal application, and the R.E.P.'s geographic location.

3. Lead QR assigns review to Quality Reviewer

Based on the applicant information in Step 2 and reviewer availability, the Lead QR assigns the application to a Quality Reviewer and alerts R.E.P. Support. (In the Asia Pacific region, R.E.P. Support Asia/Pac assigns the review to the Quality Reviewer.)

4. R.E.P. Support alerts Quality Reviewer to assignment

R.E.P. Support provides the application, course materials, and supporting documents to the assigned Quality Reviewer via a secure platform.

5. Quality Reviewer receives materials

If the materials are paper-based, then the Quality Reviewer will receive a package from PMI Global Operations Center (GOC) or the Asia Pacific Service Center containing the materials. If electronic, the Quality Reviewer will access them through a secure internet service.

6. Quality Reviewer determines presence of conflict of interest

It is the Quality Reviewer's responsibility to notify R.E.P. Support immediately (within 3 days of initiating a review) if a conflict of interest is uncovered with the applicant. Examples of conflict of interest include previously working for the applicant, designing training or teaching for the applicant, having a personal or professional relationship with the applicant, etc. In the event there is a conflict of interest, R.E.P. Support will alert the Lead QR who will re-assign the quality review to another Quality Reviewer.

Part 2 – Quality Review

7. Quality Reviewer initiates the review

The Quality Reviewer emails the applicant and introduces themselves to the applicant to begin the review.

8. Evaluate evidence

The Quality Reviewer evaluates each item provided in the application package against the items and their pre-determined criteria.

9. Quality Reviewer completes review and alerts applicant

The Quality Reviewer emails the applicant to close the quality review. The Quality Reviewer indicates the following to the applicant:

- a. the review is complete
- b. the recommendation has been sent to PMI
- c. which license the applicant requires

After 30 days from completion of the review, the applicant's materials will be deleted from the Quality Reviewer's computer. Or, if the materials are paper-based, they will be returned to the applicant, or destroyed, if requested.

At this juncture, the outcome of the review was either successful or unsuccessful.

If the quality review outcome was successful:

10. R.E.P. Support alerts the applicant

R.E.P. Support emails the applicant and alerts them to the outcome of the review and to their Intellectual Property licensing requirements.

For new R.E.P.s:

Websites of new R.E.P.s are reviewed by the R.E.P. Lead Quality Reviewer for IP compliance. If the site is free of violations, the Lead Quality Reviewer approves the organization. If not, the Lead Quality Reviewer will request that the Quality Reviewer work with the applicant to bring the marketing materials into compliance before approval can be granted.

11. If the organization requires the Premium IP License, R.E.P Support requests payment

R.E.P. Support requests the signature and Premium IP License payment and processes the payment.

12. R.E.P. Support sends a welcome letter and the R.E.P. status becomes active

If the quality review outcome was unsuccessful and the Lead Quality Reviewer determines the application has failed:

13. Lead QR sends a notice of unsuccessful review to the applicant and the R.E.P. status becomes inactive

The Lead QR sends an email to inform the applicant why the review was unsuccessful.

If this was a failed initial quality review that will not be placed into second review:

The applicant may reapply after 90 days from their failure date. The \$350 application fee applies at the time of re-applying.

If this is a reapplying R.E.P. who has failed recently (within the past calendar year) and failed again during this quality review:

The applicant must wait one year from notification before applying again. The \$350 application fee applies upon re-applying.

If the quality review outcome was unsuccessful and the Lead Reviewer determines it should move to second review:

14. Lead QR alerts the applicant to the need for second review

An email is sent to the applicant that explains why the application has been placed in second review and describes next steps.

15. Lead QR assigns second Quality Reviewer

In some cases, the same Quality Reviewer will be assigned. In other cases, a different Quality Reviewer will be assigned, depending on the circumstances of the quality review.

16. R.E.P. Support provides the Quality Reviewer with first reviewer's completed review materials

17. Continue with steps 8-13.

4. First and Second Reviews

Background

In some cases, an application does not successfully pass the initial quality review and is directed to a second review by the Lead Quality Reviewer. Applicants are not entitled to a second review – second reviews are offered only, in most cases, if issues holding an application from success are PMI intellectual-property related.

The second review allows the applicant additional time to make the corrections to course materials and/or marketing materials to bring the submission into compliance with PMI quality standards and policies. Completing a second review does not guarantee a successful outcome. Applicants may not make changes to the course material itself, other than adjusting Intellectual Property issues.

Guidelines

Circumstances that could result in second review include:

- The applicant needs additional time to make extensive changes to lengthy course materials (ex: citing sources to align with PMI's Intellectual Property Guidelines)
- The applicant's web design vendor is unable to make substantial, required updates in the required time frame

Some unsuccessful first reviews should not enter a second review. Reasons for failure at first review include (but are not limited to):

- The applicant shows disinterest or is unwilling to comply with PMI policy
- The applicant fails to provide critical documentation or course materials even when specifically requested by the Quality Reviewer
- The applicant is unresponsive after several emails from the Quality Reviewer (general guideline is three or more emails over three or more weeks)
- The course materials are aligned to an outdated version of PMI standards
- The application has recent repeated failed application attempts and the current application and shows little or no improvement (to be determined by the Lead Quality Reviewer)
- There is a history of the same and repeated IP violations in past quality reviews (for cycle renewals only)

Special circumstances can include:

- If an applicant indicates that additional time is necessary to make corrections and is within two weeks from when the reviewer communicates the issues, normally the application should remain in the first review

Moving to Second Review — Process Overview

If the Quality Reviewer indicates that the review was unsuccessful, The Lead Quality Reviewer will determine whether a second review is justified or the application should be deemed unsuccessful and closed.

When a second review is initiated, the applicant receives a standardized message from the Lead Quality Reviewer stating that the first review is complete but unsuccessful and the materials are being moved to second review. The message also lists items responsible for the unsuccessful outcome of the first quality review. The message states that the applicant must consider comments and questions from both reviewers and that if the second review is unsuccessful, they must wait three months (or one year for re-applicants) before they can reapply to the program.

The second Quality Reviewer will be provided the applicant's materials and will contact the applicant to begin the process.

5. Selecting Courses for Quality Review

R.E.P. Support will determine if alternative course(s) should be reviewed compared to those courses submitted with the application and based on the listings in the provider's marketing materials. PMI may choose any course offered by the R.E.P. for quality review.

PMP® Certification Exam Prep Courses

If an applicant offers a PMP certification exam preparatory course (prep course), it must be submitted for review even if this course was submitted previously. If a PMP certification exam prep course is not offered, the applicant must submit a project management fundamentals/foundations course, if available. Given that both the R.E.P. Program quality requirements, including PMI's Intellectual Property (IP) policies, continually evolve, PMI wishes to confirm that the course submitted for quality review is in compliance with current quality criteria and IP policies.

For this reason, if a PMP certification exam prep course is not provided, the Quality Reviewer will check the applicant's website to confirm the provider does not offer a PMP prep course before the review is started.

PMP Certification Exam Prep Courses in Development

If a PMP Certification Exam Prep course is located in an applicant's marketing materials, the Quality Reviewer will contact the provider and obtain access to that course. If a prep course is listed, but the applicant attests that the prep course is not in use, the Quality Reviewer must request that the applicant either submits this course for quality review, or removes it from the website and all other marketing materials. The applicant must also provide an email that documents that the prep course is not offered and the listing has been removed from the organization's marketing materials. If the provider chooses to remove the listing, they will be subject to audit, to ensure that they have continued to not advertise and offer the course.

If it is determined that a PMP certification exam prep course is in development at the time of quality review, but is not yet complete, the Quality Reviewer will review a different course that is currently offered. If the prep course development is complete but not yet offered, the Quality Reviewer will review the prep course.

Courses with Multiple Delivery Methods

A course that has multiple delivery methods requires a unique activity number for each delivery method and therefore requires quality reviews of each methodology. For example, if an R.E.P. offers Classroom and Distance Learning PMP prep courses, both courses must be reviewed.

6. Non-Consultative Approach

A Quality Reviewer is an impartial/unbiased professional who does the following:

- Establishes a temporary relationship with the R.E.P. applicant for the purpose of completing the application process.
- Documents (for internal purposes) areas within the submitted materials that are unclear or require elaboration.
- Alerts PMI of the findings.
- Alerts the applicant that the quality review is complete and was sent to other departments within PMI for further evaluation and determination of status.

A PMI Quality Reviewer does not do the following:

- Counsels applicants in modifying their course materials to avoid the need for the Premium Level IP License. The applicant may not remove course material [figures, excerpts] in order to attempt to qualify for the Basic Level IP License. A course which has been modified in this way will not be reviewed and will be returned to R.E.P. Support).
- Consults and assists in rewriting applicant submissions. The application is viewed as a reflection of the applicant's business practices and course offerings.
- Informs the applicant of outcome of quality review. This depends on other factors that are not under the control or responsibility of the Quality Reviewer or the R.E.P. applicant.

7. Unsuccessful Quality Review and Custom Agreements

When an R.E.P. applicant has an unsuccessful quality review and the application is closed, that organization will no longer be able to purchase the annual Premium Level IP License. This Premium Level IP license is exclusive to R.E.P.s and was created to offer greater flexibility and access to PMI IP at a special rate. The Lead Quality Reviewer will alert the PMI Legal department to the failed applicant's need for a custom agreement since the organization must purchase rights to the PMI Intellectual Property they are using, now as a non-R.E.P. It is the provider's responsibility to contact PMI Legal to determine the terms of the custom agreement.

8. R.E.P. Designated Contacts

Each R.E.P. has assigned designated contacts within their staff who are responsible and accountable for specific areas of their relationship with PMI. These contacts have agreed to perform certain duties.

These roles and responsibilities are also outlined in the [R.E.P. Handbook](#).

The Primary Contact

This individual is responsible for maintaining the relationship between the PMI R.E.P. Program and their organization. Responsibilities of the Primary Contact include the following:

- Interacting with the Quality Reviewer during a quality review
- Distributing program messages, including the R.E.P. Newsletter, to staff members within the organization
- Maintaining enrollment and ensuring account details are up to date
- Meeting all program requests within time allotted
- Contacting program staff and initiating account updates
- Placing all organization's orders for the bookstore (to receive a 50% discount on certain items)
- Ensuring new R.E.P. compliance requirements are provided to the organization's compliance contact

During the quality review process, the primary contact may delegate or request the inclusion of other individuals in the review process; however, the responsibility for the contact with the Quality Reviewer and the promptness of all communications remains with the primary contact.

The Compliance Contact

This individual is responsible for ensuring that all PMI R.E.P. program criteria are met at all times during participation in the program. (The compliance contact may be the same person as the primary administrative contact.) Responsibilities include the following:

- Executing a process to demonstrate that the organization follows a clear, measurable process to ensure that all PMI R.E.P. program criteria are met (this process may or may not have been created by the compliance contact).
- Ensuring activities and marketing materials comply with PMI policy and IP guidelines. This includes when activities are changed or new activities are created.

Additional Contacts

Additional contacts are not mandatory. They are individuals assigned by the applicant to receive information regarding enrollment and general account information. Responsibilities include the following:

- Acting as back up to primary contact
- Contacting R.E.P. Program staff and initiating account updates