



Program Guidelines

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1. SCOPE & PURPOSE

The CII Registered Provider Program (CII RP) registration is available to all Construction Industry Institute (CII) member organizations that wish to be referred by, and are accepted by CII, as qualified implementers and instructors of CII practices and methodologies.

The purpose of the CII RP is to

- 1.1 Support member companies of CII and the general public with implementation of CII Practices and methodologies.
- 1.2 Provide a framework of support by a corps of qualified implementation advisors and instructors knowledgeable and experienced with the CII body of practices, benchmarking databases, and methodologies available to consult and teach at CII member organizations and other venues.
- 1.3 Advise CII members and general public of qualified implementation advisors and instructors on CII Best Practices and other publications.
- 1.4 Assure the applicability, quality, and currency of instruction by the RP's on CII best practices, research findings and other products.
- 1.5 Monitor the feedback from clients on the quality of the RP advisors and instructors, and of the effectiveness of the material being presented
- 1.6 Provide for the continuing development and upgrade of CII implementation tools, methodology, and education materials.
- 1.7 To facilitate a quicker elevation of industry knowledge and implementation of CII practices amongst capital project organizations.

2 DEFINITIONS

- 2.1 **CII.** The Construction Industry Institute. A consortium of leading owners, engineering and construction contractors, and suppliers collaborating on important industry issues by providing guidance on practices discovered through research and offering implementation, education, and other programs. CII is based at the Cockrell School of Engineering at The University of Texas at Austin.
- 2.2 **Event.** A structured occasion such as a course, class, or seminar for the purpose of delivering instruction or facilitation services to implement CII research and products.
- 2.3 **General Public.** An organization that is not a member of CII or an individual that is not employed by an organization that is a member of CII.
- 2.4 **Client.** An individual or organization receiving consulting and/or education services from the provider.
- 2.5 **Organization / Advisor / Provider / Instructor.** A party who agrees to furnish consulting services and/or educational instruction in accordance with this program.
- 2.6 **CII RP Oversight Committee.** A committee made up of 2 participants from each of the CII Standing Committees and their respective CII Associate Director.



3 ELIGIBILITY

To be eligible for registration as a CII Registered Provider the following conditions must be satisfied:

- 3.1 Provider must be a member of CII throughout the term of the of CII RP program.
- 3.2 A completed registration application must be submitted annually and approved by CII. Colleges, universities, and other educational organizations partnering with CII may request special consideration to participate, subject to approval by the PR Oversight Committee.
- 3.3 Provider shall have been in operation as a viable project, program or portfolio management or educational institution for a minimum of five (5) years immediately preceding the time of application.
- 3.4 Provider must employ select individuals who are versed in their related CII practices and methods.
- 3.5 Provider agrees to provide at the time of application, evidence of a minimum of three (3) years of experience/contribution for each area of practice selected in the CII Knowledge Base.
- 3.6 Provider shall be in compliance with all applicable laws and RP Program Guideline requirements and shall be legally constituted and recognized in the jurisdiction, as evidenced by a valid business license or similar documentation.

Each Company and Instructor will be reviewed and approved annually.

4 REQUIREMENTS

Providers in this program agree:

- 4.1 To abide by the criteria noted herein and accept full responsibility for the quality assurance of the advising and/or instruction services that they offer.
- 4.2 To abide by all applicable laws and regulations and are responsible for any taxes and fees assessed by applicable jurisdictions.
- 4.3 That member participation in CII events is required to continue in this program.
- 4.4 To abide by CII's Data Confidentiality Agreement and accept full liability for misuse of any data that is either collected during consulting services or provided by CII to be used for the Provider service.
- 4.5 To comply with all laws and regulations with regards to CII intellectual property and shall comply with CII's copyright restrictions.
- 4.6 To furnish attendees at each event with appropriate documentation of attendance in the form of certificates of completion or equal.
- 4.6 To present CII developed material in such a way that the product remains consistent with the content, form and quality of the original CII material. The content of the material may not be altered without prior written approval from CII.
- 4.7 To give CII full credit as the developer of the material. The CII produced material may be supplemented by the Provider and all supplemental material will be properly identified by the Provider to reflect the source. The organization and layout of the material will be consistent with that of the CII produced documents.



- 4.8 To incorporate CII comments into the material Provider prepares for instruction.
- 4.9 To insure that only the current version is used in provider events. CII periodically updates information concerning the current edition and version of CII publications and products.
- 4.10 To discontinue distribution of any materials and to make all necessary corrections or to destroy all remaining stocks, if CII notifies Provider, that Provider's materials are below acceptable quality standards.
- 4.11 To maintain complete rosters of attendees at each event, including the title of the presentation, material presented, and the names, title and organization of each instructor and participant. These records shall be maintained for a minimum of one (1) calendar year after completion of the event, or as required by applicable jurisdictions.
- 4.12 To design offerings around clearly defined learning objectives and structured to achieve the stated learning objectives.
- 4.13 To conduct their events in an ethical, professional and lawful manner respecting the rights and worth of all clients.
- 4.14 Not to discriminate based on race, ethnic origin, gender, nationality, disability, religion, or sexual orientation.
- 4.15 To furnish CII with markups of CII material that Provider suggests require revision and/or correction. CII shall apply reasonable efforts to accommodate Provider's requests
- 4.16 To employ CII designated and/or approved participant evaluation of instructor forms at each event. These evaluations may be hardcopy or completed via input at a CII designated web site.
- 4.17 Publications purchased by Provider from CII at a discount shall be distributed only in conjunction with a Provider Event, unless provided by separate written agreement with CII

5. FEES BY PROVIDER

Providers will pay a separate fee for the administration of the RP program. CII reserves the right to amend the program fee structure. For information on current year fees, please request a RP application.

6. REGISTRATION & RENEWAL

The program period runs the calendar year of January 1 to December 31. Registrations occurring after January 1 will end on Dec. 31 of that year. Candidates for registration must successfully complete all requirements prior to acceptance into the program:

- 6.1 A completed CII Provider Application
- 6.2 Evidence of a minimum of three (3) years of experience/ contribution for each area of practice selected in the CII Knowledge Base.



- 6.3 Evidence of having provided project, program or portfolio management advising and/or instruction services for a minimum of five calendar years (immediately preceding the date of application)
- 6.4 A synopsis of the provider's experience and practice advising and instruction in the capital projects industry
- 6.5 Evidence that member company is legally established according to the applicable laws at your location: your organization's business charter, articles of incorporation, accreditation by an appropriate accrediting body, or evidence of recognized proprietorship.
- 6.6 Supportive client evaluations of the CII Registered Provider's services

Member organizations selected to participate in the program will provide customer testimonials with the history of CII practice implementation and/or instruction and a one - two page case summary for a project done in each of the past three years that includes:

- a description of the client organization,
- dates of the project,
- a statement of the client issue,
- how the issue was analyzed,
- the solution proposed and implemented,
- the benefit(s) realized by the client.

7 MARKETING BY PROVIDER

Provider shall fully comply with CII copyright and intellectual property protection requirements included herein. When publicizing its participation in the CII RP, Provider may use only the CII furnished CII RP logo.

Provider shall make no statements or representations indicating or implying that CII has accredited, certified, sponsored, endorsed, or guaranteed any of Provider's products, publications or services. The only statement the Provider may make is that Provider "has been reviewed and approved as a registered provider of advising and/or instruction services in CII published practices by the Construction Industry Institute (CII)."

All other marketing statements by Provider in connection with this Registered Provider Program are to be approved in writing by CII prior to distribution.



8 COPYRIGHTS AND INTELLECTUAL PROPERTY

The CII copyright mark is “© [year] Construction Industry Institute®” shall appear on all CII publications and products.

Provider shall give proper notice to clients of CII ownership of its copyrights and marks and require participant’s adherence to CII copyright statements.

Provider shall not use the letters “CII”, the phrase “Construction Industry Institute” or any CII trademark, service or certification mark in any domain name, e-mail account or company name.

Providers shall not reproduce CII publications in any medium for use or distribution without prior written permission from CII Associate Director for the RP.

CII products and publications are available to non-members of CII by purchase. No copies may be made in any medium, or distributed, and no modifications made without prior written permission from CII.

9 ADMINISTRATION

This program will be administered by the CII RP Oversight Committee. CII best practices and methodologies are currently grouped into specific knowledge areas as found in the CII Knowledge Base.

CII, at its sole discretion, may audit any provider event free of charge to assess compliance with this program.

CII reserves the sole and exclusive right to allow or terminate their participation in this program, without penalty if it is determined that the provider has acted contrary to the requirements of this program.

Should Provider cease participation in this program, they agree to immediately discontinue all use of the CII RP copyright mark and will no longer represent themselves as a CII Registered Provider.

The RP Oversight Committee will approve all CII practice(s) and methodologies that may be offered through the CII RP Program. The RP OC holds authority to terminate specific practice offerings.

Providers are not holders of licenses or franchises for distribution of CII product.

CII reserves the right to amend and/or discontinue this program at any time. In the event that the program is discontinued during the term of a Provider’s registration, and the Provider is at fault, all promotional materials will be removed. If this program is discontinued at no fault to the Provider, their promotional materials will continue to be listed on CII’s web page until the registration expires or the program is closed in whole.