DAMA-DMBOK® 3.0 Community Contribution Guidelines

Transparent, consistent, and fair community participation

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1) Purpose and scope

These Guidelines explain how to submit feedback and content proposals to the DAMA-DMBOK® 3.0 project, and the rules that apply to all submissions—covering intellectual property (IP), confidentiality (NDA), consent, use of personal data, and attribution. They apply to the following audiences (our four **Community Tiers**):

- **Tier 1 — DAMA Members:** DAMA® Chapters, Chapter Members, and Individual Professional Members.
- **Tier 2 — Non-DAMA Members:** individual data practitioners and professionals; academia and educators (REPs).
- **Tier 3 — Organizations:** industry associations and enterprises, government, and standards bodies.
- **Tier 4 — External Contributors:** authors and industry experts (thought leaders), and previous authors/editors of **DAMA-DMBOK® 2.0**.

Important: For quality, safety, and traceability, we **only** accept contributions via our **eight structured engagement activities** (Benchmark Survey; Focus Groups R1; Always-Open Feedback Portal; Public Exposure Period; Focus Groups R2; Open Call for Contributions; Interview Series; Expert Contributor Engagement). Submissions outside these channels (e.g., email/DM to editors) will not be processed. See §4 for the definitive list and timing.

These Guidelines complement our **Feedback Management Approach** (collection → analysis → editorial integration → transparent communication), which provides the traceability and fairness behind every decision.

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2) How the project is governed (our "Triple Helix")

DAMA-DMBOK® 3.0 is developed through a **Triple Helix** operating model that balances expert authorship, rigorous peer review, and broad community input:

1. **Editorial Board (core development team).**

The development effort is streamlined and managed by the Editorial Board—a dedicated team of 11 Specialty Editors, guided by a Lead Editor and supported by a Technical Writer. They: are accountable for content architecture, development, and

quality; plan and run editorial sprints; incorporate community input; and uphold vendor-neutrality and global relevance.

2. **CDMP® Masters Editorial Review Panel (ad hoc expert peer review).**

A dedicated group of 7 CDMP® Masters who provide expert peer review and strategic feedback on content developed by the Editorial Board, ensuring we publish content that meets the highest industry standards for accuracy and quality.

3. **Global Data Community (structured engagement).**

Contributes through the eight activities in §4, producing tagged, auditable input that flows into editorial sprints via the Feedback Management Approach.

How this works in practice

- **Transparent pipeline:** Inputs are collected via standardized forms/sessions, logged with metadata, analyzed (quant + qual), and routed to Specialty Editors; decisions are tracked (source → status → outcome).
- **Quality & neutrality:** We maintain vendor-neutral content while incorporating diverse, regionally aware insights to ensure global applicability.
- **Feedback loops:** Periodic briefs and sprint summaries show how input was used or addressed.

This structure ensures clear roles, rigorous quality control, and transparent engagement throughout the lifecycle.

3) What kinds of contributions we're seeking

We're looking for the following contributions:

- **Feedback through our DAMA-DMBOK® Benchmark Survey:** Insights on experiences, expectations, pain points, and priorities gathered via our formal survey instruments.
- **Feedback on drafts via our crowdsourcing platform:** Comments on clarity, correctness, global applicability, and alignment with recognized standards and practices.
- **Errata and issues:** Factual corrections, outdated references, inconsistencies, and broken links.
- **Localization/translation signals (non-English contexts):** Terminology concerns, ambiguous phrases, or region-specific nuances that affect comprehension. For translations or other derivative works, contributions flow through chapter programs governed by the **Chapter Contribution Agreement**.

- **Feedback, insights, and use cases from focus groups and interviews:** Structured, vendor-neutral learnings captured in facilitated sessions (NDA may apply for closed reviews).
- **Best practices and case studies:** Vendor-neutral, globally relevant, non-confidential lessons learned that illustrate the "how" and "why".
- **Evidence-based content proposals:** New topics, reorganizations, definitions, examples, figures—guided by published **Submission Guidelines & Criteria** during *Open Calls for Contributions*.
- **Glossary and terminology enhancements:** Clear definitions, usage notes, and citations to strengthen coherence across the guide and the broader DAMA corpus. Formal terminology/content contributions are accepted under the **Contributor Agreement** (work-for-hire/assignment; acknowledgment at DAMA-I's discretion).
- **Reusable practitioner assets:** Rights-cleared templates, checklists, RACI models, and measurement frameworks that can be generalized for global use (source files preferred).

Out of scope (will be declined)

- **Marketing or promotional material** (sales pitches, product endorsements, brand-centric examples).
- **Proprietary or confidential third-party information** (unless explicitly requested under a DAMA-I NDA—and only if you have the right to share it).
- **Content that violates third-party IP rights** (including screenshots/figures you don't own or can't license to DAMA-I).
- **One-off requests for private editorial meetings** or ad-hoc submissions outside our structured channels.
- **Personal data beyond what is necessary** for contribution management (e.g., sensitive data in examples).
- **Country-specific legal advice** or compliance interpretations without authoritative citations.
- **Vendor-dependent methods** that can't be generalized or anonymized.
- **Duplicate, non-substantive, or unverifiable claims** (especially those lacking sources or evidence).
- **Low-fidelity images or figures without source files** that cannot be edited for quality or accessibility.

IP reminder: By submitting content for potential incorporation, you confirm it's original (or you have the rights to submit it) and acknowledge DAMA-I's ownership and unrestricted use per the Contributor/Chapter Agreements.

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4) Where and how to contribute (structured channels)

To ensure fairness, traceability, and quality under our Triple Helix model, **we accept feedback and content only through the eight activities below** (as defined in the Engagement Strategy). Submissions outside these channels (e.g., emails/DMs to editors) will not be processed.

4.1 Engagement Activities

1. **Benchmark Survey** — online survey capturing structured quantitative/qualitative input. *(Timing: Aug–Sep 2025 · Audience: All)*
2. **Focus Group Sessions (Round 1)** — facilitated virtual sessions to surface needs and priorities. *(Timing: Q4 2025 – Q1 2026 · Audience: DAMA Individual Professional Members & Chapters)*
3. **Always-Open Feedback Portal** — continuous online form for ongoing, tagged input. *(Timing: Sep 2025 onward, including post-publication · Audience: All)*
4. **Public Exposure Period** — community commenting on draft materials via a crowdsourcing platform. *(Timing: 2026 · Audience: DAMA® Individual Professional Members & Chapters)*
5. **Focus Group Sessions (Round 2)** — targeted virtual sessions refining chapter-level drafts. *(Timing: 2026 · Audience: DAMA® Individual Professional Members & Chapters)*
6. **Open Call for Contributions** — formal, rubric-based submission of evidence-backed proposals and assets. *(Timing: Q4 2025 – Q1 2026 · Audience: All)*
7. **Interview Series with Thought Leaders & Previous Contributors** — recorded interviews to capture expert context and direction. *(Timing: Q4 2025 – Q1 2026 · Audience: All)*
8. **Expert Contributor Engagement** — ad hoc virtual sessions with SMEs to address specific gaps. *(Timing: Ad hoc · Audience: All)*

How to join each activity: We publish calendars, sign-up links, and instructions on the project site and via DAMA® newsletters/town halls. We also share periodic updates and sprint summaries so contributors can see how input was used.

IP, consent, and confidentiality: All activities use standardized forms and logging with clear IP and consent protocols; some targeted sessions may include additional confidentiality controls where appropriate.

Translations and other chapter-led derivatives: These are not a public submission channel; they are run separately under the **Chapter Contribution Agreement**. Chapters coordinate directly with the project team when a program is opened.

4.2 Post-publication errata

After publication, we maintain an **Always-Open Feedback Portal** (see §4) for reporting **errata** (factual errors, broken links, outdated references).

- Each erratum is logged, triaged weekly, and addressed in maintenance sprints; outcomes are summarized in the bi-monthly community briefs and release notes.
- Safety-critical or widely impactful corrections may trigger a rapid update outside regular cadence.

5) Submission checklist

These are our **general submission guidelines**. Use this universal checklist for any submission. More detailed, activity-specific guidelines (including templates, formats, and upload limits) will be published as they become available. For example, we are currently developing dedicated **Submission Guidelines** for the '*Open Call for Contributions*' activity, which will provide more detailed requirements on content contribution and inclusion criteria.

5.1 Before you submit

- **Pick the correct activity** (one of the eight in §4); submissions outside these channels aren't accepted.
- **Confirm rights & originality:** your material is original or you have the rights to submit it; do **not** include third-party confidential information.
- **Stay vendor-neutral** and globally applicable; avoid promotional language.
- **Attach source files** (for figures/templates) so editors can adapt for quality/accessibility.
- **Provide citations/sources** for facts, standards, regulations, and definitions.
- **Declare conflicts of interest** (employer, clients, vendors, financial interests).
- **Acknowledge legal terms:** IP/ownership and warranties (see §8; Contributor or Chapter agreements may apply for formal content or translations).
- **Review privacy/consent** for the activity (recordings, attribution preferences, contact permissions). See §9.

5.2 Submit via the activity-specific channel

- **DAMA-DMBOK® Benchmark Survey / Always-Open Feedback Portal:** complete all required fields; keep examples concise.
- **Focus Groups (R1/R2)**: sessions are live and recorded; participants are expected to follow the facilitation guide and instructions, reference chapter/paragraph IDs, keep comments actionable, and maintain a professional and respectful tone throughout.
- **Public Exposure Period**: follow the commenting guide; reference chapter/paragraph IDs; keep comments constructive and evidence-based.

- **Open Call for Contributions:** use the official template; meet the evaluation rubric (clarity, evidence, global relevance, IP cleanliness). *(Detailed guidelines for this activity will be published soon.)*
- **Interview Series**: accept the briefing and IP/consent form; be aware of recording requirements.
- **Expert Contributor Engagement**: confirm scope and expectations in advance; sign the IP/consent form; NDA requirements will apply.

5.3 After submission

- You'll receive a confirmation, and your input will be **tagged and routed** under the Feedback Management Approach. We share aggregated updates in community briefs and sprint summaries.

5.4 Eligibility & authority to contribute

By participating in the DAMA-DMBOK® 3.0 engagement activities (see §4), you confirm that:

- You are legally able to grant the rights described in §8 (or are acting with **written authorization** from your organization).
- Your submission is **original** to you or you have the necessary rights/licenses to submit it; it does **not** include third-party confidential information or content you are not authorized to share.
- If you participate on behalf of a **DAMA Chapter** (e.g., translations), you understand that the Chapter pathway is governed by the **Chapter Contribution Agreement** and additional approvals may be required.

Notes on alignment with legal terms (for consistency with §§ 8–9)
- Formal content incorporation (definitions, figures, templates, case studies) may require accepting or signing the Contributor Agreement.
- Translations and localized glossaries run under the Chapter Contribution Agreement.

6) How we process feedback (transparent by design)

We apply a four-stage **Feedback Management Approach (FMA)** so every submission is captured, fairly assessed, and traceably integrated (or declined) with clear

communication back to the community. The diagram below (fig 1.) shows the end-to-end Feedback Management cycle: **COLLECT → ANALYZE → INTEGRATE → COMMUNICATE**.

Figure 1: End-to-end Feedback Management Cycle

6.1 Structured collection

- **Input channels.** We collect submissions exclusively through the eight engagement activities (e.g., Benchmark Survey, Focus Groups, Always-Open Feedback Portal, Public Exposure Period, Open Call, Interviews, Expert Contributor Engagement). Refer to the activity list and timing in §4.
- **Capture methods.** We use standardized forms, recordings/transcripts (where applicable), and a central repository with metadata tagging. Every item is logged so we can route it efficiently and track outcomes. Clear IP and consent protocols are embedded in all forms.
- **Operational cadence.** For example, entries in the Always-Open Feedback Portal are triaged weekly by the PMO, with monthly summary briefs compiled for the Editorial Board (see page 9).

6.2 Aggregation & analysis

- **Quantitative.** We generate dashboards and heatmaps to spot comment density, patterns, volumes, and trends across chapters and themes.
- **Qualitative.** We apply thematic coding (e.g., with NVivo) and cluster insights by knowledge area to surface high-value, globally relevant feedback. *More detailed, activity-specific processing protocols will be published soon* and applied consistently across all engagements.
- **Review lenses.** Analysis explicitly checks vendor-neutrality, global relevance, and structured participation—the project's strategic objectives.

6.3 Editorial integration

- **Routing & sprints.** Insights are routed by topic/theme to Specialty Editors and handled in sprint-based reviews. Conflicting inputs go through structured deliberation; high-signal items are prioritized for upcoming cycles.
- **Traceability.** Each feedback item is tagged with its source and status, and comment-to-decision logs document the editorial outcome for accountability
- **Typical statuses (draft).** Received → In review → Needs more info → Accepted (scheduled) → Incorporated → Deferred → Declined (with a reason category). These mirror the repository fields used for logging and sprint hand-offs.

6.4 Transparent communication

- **What contributors see.** We publish how input was used or addressed via bi-monthly community briefs and sprint summaries on our website; town halls and newsletters reinforce the loop.
- **Risk controls.** To reduce overload and ambiguity, we rely on structured protocols, tooling for analysis, and weekly triage; to avoid IP confusion, we use clear IP consent language in all channels.

What to expect after you submit: a confirmation, logging in our repository, and routing to the right editors. If we need clarification, we'll contact you via the email address you provided. Aggregate outcomes are reported in the scheduled briefs and sprint summaries noted above.

7) Minimum quality and formatting standards

These standards help reviewers act quickly and fairly across the eight engagement activities and ensure your contribution can be incorporated if accepted. Where an activity has its own template/rubric (e.g., **Open Call for Contributions**), follow that first.

7.1 Content quality & evidence

- **Be concise and actionable.** State the problem, the proposed improvement, and the benefit to practitioners or educators.
- **Cite your sources.** Provide references for facts, standards, regulations, and definitions (e.g., ISO/IEC, PMBOK®, NIEM, NIST).
- **Evidence-based.** Prefer references, data, or documented practice over opinion; align with the activity's evaluation rubric when applicable (Open Call).

7.2 Neutrality & global relevance

- **Vendor-neutral.** Avoid product promotion, brand showcases, or proprietary methods that can't be generalized. This is a core Strategic Objective (vendor neutrality) for DAMA-DMBOK® 3.0.
- **Globally applicable.** Use inclusive language; call out regional terms or legal constraints and provide authoritative citations. Localization/translation signals are welcome; full translations run via chapter programs (see §8.3).

7.3 Rights, confidentiality, and personal data

- **You must have the rights.** Submit only original material or content you are authorized to submit. Formal content contributions follow the **Contributor Agreement**.
- **Chapters/translations.** Chapter-led derivatives (e.g., translations, localized glossaries, templates, guidelines) operate under the **Chapter Contribution Agreement**.
- **No confidential/third-party secrets.** Do not include client/employer confidential information or sensitive personal data. Some closed sessions may require NDAs; even then, only share what you are authorized to share (see §8).

7.4 Submission style & references (lightweight standard)

To speed review and reuse:

- **Text.** Use clear headings; reference specific sections/paragraphs when commenting on drafts; include definitions inline where helpful.
- **Citations:** Provide sources for standards, regulations, or research (author/organization, title, year, URL or DOI if available).
- **Figures & tables:** Attach editable source files (e.g., PPTX, SVG, DOCX, XLSX). Provide a short caption and (when possible) alt text for accessibility.
- **File hygiene.** Use descriptive filenames (e.g., Topic_KnowledgeArea_ShortTitle_v1_YYYYMMDD.ext), avoid embedded sensitive data, and ensure images are high-resolution.
- **Case studies.** De-identify organizations/people; focus on the approach, controls, and outcomes that can be generalized.
- **Cross-referencing drafts:** When commenting, reference chapter/section/paragraph IDs from the platform.

7.5 Originality screening & responsible AI use

- We may conduct **originality checks** (e.g., plagiarism/duplicate-content screening) on formal content submissions and figures.
- **AI-assisted writing is allowed**, but **you remain fully responsible** for accuracy, originality, rights, and citations. We may request sources or decline content that

cannot be substantiated or that conflicts with vendor-neutrality/global relevance criteria.

7.6 Common pitfalls (cause delays or rejection)

- Promotional tone or vendor-specific content;
- Unsupported assertions or missing citations;
- Low-fidelity or non-editable diagrams;
- Inclusion of confidential information or personal data is not necessary for review;
- **Submissions outside the eight engagement activities** cannot be processed.

Quick cross-references: For IP/ownership and NDA requirements, see §8 (Contributor/Chapter agreements). For privacy/consent, see §9. The Engagement Strategy underpins these standards and the end-to-end process.

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8) Legal notices (IP, confidentiality, warranties)

Applicability. This section applies to all submissions made through the **eight structured engagement activities** described in §4 (e.g., surveys, portals, focus groups, public exposure/crowdsourcing, interviews, open calls). Our Engagement Strategy requires clear IP and consent protocols across all inputs.

8.1 Ownership and use of submissions (applies to all submissions)

By submitting any feedback, content, files, or ideas ("**Submission**") to the DAMA-DMBOK® 3.0 project:

- You acknowledge that DAMA International ("DAMA-I") becomes the owner of the Submission and may use, reproduce, modify, publish, distribute, sublicense, or choose not to use the Submission, in whole or in part, in any medium, at DAMA-I's sole discretion. DAMA-I makes no guarantee of inclusion of your Submission in any materials published by DAMA-I.
- You irrevocably waive any rights (including moral rights to the extent permitted by law) in the Submission and agree to execute further documents if needed to confirm DAMA-I's ownership.
- You understand that Submissions are voluntary and uncompensated, and that DAMA-I may edit or adapt the Submission.

Why this is needed: It ensures we can incorporate community input into the evolving framework and related materials without legal ambiguity. (See also the "work-for-hire/assignment" terms in §§ 8.2–8.3.)

Privacy note: How we handle your personal data appears in §9 (Consent & data protection); please read that section alongside this one. Our Engagement Strategy explicitly calls for clear IP and consent protocols across all channels.

8.2 Individual contributor terms

For formal content contributions (beyond informal feedback), contributors will be asked to accept and sign the **Contributor Agreement**. In summary:

- The contribution is treated as "work made for hire," or if that doctrine does not apply, rights are irrevocably assigned to DAMA-I on a worldwide, royalty-free, perpetual basis.
- DAMA-I may use, reproduce, modify, publish, distribute, sublicense, or not use the contribution at its sole discretion; no compensation is due.
- DAMA-I may acknowledge contributors in an acknowledgment section at its discretion (acknowledgment does not create rights).
- The contributor warrants originality and non-infringement and agrees to indemnify DAMA-I for breach of that warranty.

Implication for you: When invited to submit formal content (definitions, figures, exemplars, templates, etc.), you'll accept these terms during the submission flow and sign electronically.

8.3 Chapter and translation programs

Chapter-led **derivative works** (e.g., translations, localized glossaries, templates, guidelines) are only allowed under a signed **Chapter Contribution Agreement**, as required by the **Affiliated Chapter Agreement**.

Key points:

- **Ownership.** All derivative works are owned solely by DAMA-I from creation, either as works made for hire or by automatic assignment.
- **Scope.** Chapters may use DAMA-I materials only for the approved derivative work. Outside that, use is limited to the "Limited DAMA-DMBOK® Materials" listed in Appendix B of the Affiliated Chapter Agreement.
- **Quality control.** All drafts and revisions must be submitted for DAMA-I approval; DAMA-I may withhold approval and may audit usage.
- **Attribution.** DAMA-I may, at its discretion, acknowledge the Chapter as a contributor.
- **Termination.** Rights end automatically if a Chapter becomes inactive, Dormant, or Disaffiliated under the Affiliated Chapter Agreement, or if it breaches either agreement.
- **Non-transfer.** Licenses are non-transferable and cannot be resold.
- **Warranty.** DAMA-I provides materials strictly "as is," without warranties.

Implication for chapters: Secure a signed Chapter Contribution Agreement **before** starting any creation, translation, or adaptation, and follow DAMA-I's quality, branding, and review controls.

8.4 Confidentiality & NDAs

- **When NDAs apply.** Access to non-public drafts, editorial sprints, or early reviews requires signing a Confidentiality & Non-Disclosure Agreement (NDA).
- **Your obligations under NDA.** Use materials only to provide feedback; do not share or publish; safeguard access credentials; delete/return materials upon request.
- **Third-party secrets.** Do not submit confidential information you are not authorized to share (e.g., your employer's IP, client secrets).
- **Breach handling.** Violations may lead to removal from programs, invalidation of submissions, and other remedies (including legal remedies if applicable).
- **"As-is" access to drafts.** Pre-release materials shared for review are provided without warranties and may change; see also chapter/translation warranty disclaimers.

8.5 Contributor representations & warranties; indemnity

By submitting, you represent and warrant that your Submission is original to you (or you have the rights to submit it), does not infringe any third-party rights, and does not contain confidential information you are not authorized to share. You agree to indemnify and hold harmless DAMA-I for losses arising from breach of these warranties. (Formal agreements restate these obligations explicitly.)

8.6 No compensation; no guarantee of inclusion; editorial discretion

Submissions are voluntary and uncompensated. DAMA-I may or may not use a Submission and may edit it for clarity, scope, and fit; no guarantee of inclusion is made.

8.7 Acknowledgment & recognition

DAMA-I may acknowledge contributors or DAMA Chapters at its discretion (format and placement determined by DAMA-I). Acknowledgment does not create editorial rights or control. (See §9.6 on consent for name/affiliation display.)

8.8 Trademark & brand use

- The names **DAMA®** and **DAMA-DMBOK®** are trademarks of DAMA International. Use the ® symbol on first mention and use plain text thereafter.
- Do not use DAMA® or DAMA-DMBOK® logos or claim affiliation/endorsement in your materials unless you have written permission from DAMA-I.
- Case studies must avoid third-party logos and brand imagery unless you own those rights and can transfer them to DAMA-I under §8.

- When referencing the guide, use the form "**DAMA-DMBOK® 3.0**" and avoid implying authorship, control, or sponsorship.

9) Consent & data protection

This section explains how we process personal data associated with participation in the eight engagement activities, and how you can exercise your choices. Our Engagement Strategy provides for centralized capture, tagging, and traceability of inputs to enable transparent, auditable processing. All processing is carried out in accordance with the most current DAMA-I Privacy Policy, which governs in case of conflict.

9.1 Purpose of processing

We collect your name, contact details, affiliations, and submission content to:

- manage the feedback process and communicate with you,
- maintain an auditable record of contributions,
- support analysis and integration into DAMA-DMBOK® 3.0 (e.g., tagging, status tracking).

9.2 Lawful basis

We rely on **consent** (e.g., checkboxes on forms, event registrations) and on **legitimate interests** (e.g., governance, quality control, transparency) to process personal data related to engagement activities.

9.3 Privacy Policy

Your personal data will be handled in accordance with DAMA-I's Privacy Policy. Where these Guidelines differ, the Privacy Policy governs.

9.4 Communications

We will contact you regarding your submission (e.g., clarifications, status updates) and other relevant engagement opportunities. You may **unsubscribe** from such communications at any time.

9.5 Recording consent (events, interviews, focus groups)

If a session will be recorded, we will notify you in advance. By participating, you **consent to the recording** and to processing for documentation and analysis (e.g., transcripts, thematic coding) as described in our Engagement Strategy.

9.6 Attribution consent

If DAMA-I chooses to acknowledge contributors by name, we will ask for your preferred name/affiliation and consent to display it. Attribution is not guaranteed and may be withdrawn for compliance reasons. (See editorial discretion and acknowledgment in §8.7.)

9.7 Data minimization, retention, and access

We only collect data necessary to manage the process. Contribution records, decision logs, and related metadata are retained to ensure traceability and accountability throughout the editorial lifecycle (per our Feedback Management Approach).

- **Duration:** Data will be maintained only for the duration of the DAMA-DMBOK® 3.0 project. Once the project concludes, all collected personal information will be securely deleted, subject to any legal or regulatory obligations.
- **Access:** Access is restricted to authorized project personnel.
- **Anonymization:** Aggregated or anonymized insights may be retained indefinitely for reporting and research, but these will no longer identify individuals.

10) Conflicts of interest, neutrality, and fairness

What to declare (applies to all submitters). In the submission form (or session sign-up), disclose any **actual, potential, or perceived** conflicts, including: current employer and role; vendor/supplier relationships; paid advisory, speaking, or authorship; equity/stock ownership; grant or sponsorship funding; standards-body leadership; and any other affiliation that could reasonably be seen to influence your input.

Neutrality expectations. Submissions must remain **vendor-agnostic** and free of promotional tone. Methods should be generalizable and not dependent on a specific tool or product. This supports the project's Vendor Neutrality and Inclusive & Structured Feedback Process objectives.

How conflicts are managed. Declarations are logged with your submission. Where relevant, editors or reviewers with a conflict **recuse** from decisions on that item, and the item is reassigned. If a submission appears advocacy-led or commercially biased,

editors may request a neutral rewrite, anonymize examples, or **decline** per the evaluation criteria. Decisions follow the documented FMA pipeline with status tracking for accountability.

Fairness by design. All decisions are made under the **Triple Helix** operating model and the **FMA** (Collect → Analyze → Integrate → Communicate), using consistent criteria and comment-to-decision logging. Aggregate outcomes are shared in community briefs and sprint summaries.

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11) Review workflow and decision outcomes

We use the **Feedback Management Approach (FMA)** to ensure traceability and fairness from intake to editorial action. The high-level process below mirrors the editorial integration and transparency steps illustrated in the FMA. *Detailed documentation and protocols for the FMA are currently in development and will be published shortly to provide further guidance.*

11.1 Initial screening (PMO)

- **Completeness & scope:** Is the submission within DAMA-DMBOK® 3.0 scope? Are required fields present?
- **Compliance checks:** IP/rights declarations, conflict-of-interest disclosure, NDA applicability for closed activities.
- **Triage & tagging:** Topic/knowledge area, geography, type (erratum/proposal/etc.) for routing and dashboards.

11.2 Editorial review (Specialty Editors)

- **Assessment criteria:** relevance, clarity, vendor-neutrality, evidence quality, global applicability, consistency with style/terminology.
- **Deliberation:** conflicting inputs are discussed in sprint reviews; high-signal items prioritized. Traceability is maintained through comment-to-decision logs.

11.3 Expert review (CDMP® Masters Editorial Review Panel, as needed)

- Used for complex, cross-domain, or contested topics; outcomes and rationales are recorded to the same status log.

11.4 Decision outcomes (recorded in the repository)

- **Accepted (scheduled for incorporation):** approved for a defined editorial sprint or release milestone.
- **Deferred:** valuable but out of current scope or timing; may be reconsidered in a later cycle.
- **Needs more information:** editors will contact you for clarifications or sources.
- **Declined:** does not meet criteria (e.g., out of scope, insufficient evidence, commercial bias); the reason category is recorded.
- **Note:** All outcomes are communicated in aggregate through community briefs and sprint summaries; **not every submitter will receive individualized feedback**.

11.5 Appeals & resubmission

We aim for fairness and transparency under the FMA (Collect → Analyze → Integrate → Communicate). If your submission is **Declined** or **Deferred** (see §12):

- You may **resubmit** during a later engagement window if you can provide new evidence, clarifications, or broader applicability.
- For a **process clarification** (not an editorial appeal), email the support address in §15 with your submission ID; we will confirm the decision category and relevant criteria.
- Editorial judgments remain at the discretion of the Editorial Board within the Triple Helix model; no individualized coaching is guaranteed.

11.6 Important notices

There is no guarantee of inclusion and no compensation for accepted contributions; formal content contributions proceed under the Contributor Agreement terms (work-for-hire/assignment), and chapter-led translations under the Chapter Contribution Agreement.

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12) How we recognize contributors

Discretionary acknowledgment. DAMA-I **may** acknowledge contributors or DAMA Chapters for meaningful input (e.g., release notes, web pages, acknowledgments section). Acknowledgment format and placement are **at DAMA-I's sole discretion** and may change across editions.

What acknowledgment is—and is not.

- It is a form of **recognition**, not a right to editorial control, approval authority, or ongoing entitlement.
- For individuals, the **Contributor Agreement** allows DAMA-I to acknowledge contributors by name if an acknowledgments section is included; this does not create attribution or approval rights.
- For chapters, the **Chapter Contribution Agreement** allows DAMA-I, at its discretion, to acknowledge the chapter as an originating author of a derivative work (e.g., translations).

Attribution consent. If we choose to acknowledge you by name, we'll request your preferred name/affiliation and consent for display (see §9). Attribution is subject to DAMA-I's discretion and may be withdrawn at any time for any reason.

13) Code of conduct

We expect a **professional, inclusive, and respectful** environment across all eight engagement activities and communication channels.

Expected behaviors

- Be courteous and constructive; stay on topic and use inclusive, globally relevant language.
- Keep content vendor-neutral; avoid promotional claims or product endorsements.
- Respect confidentiality and NDAs where applicable; share only what you are authorized to share.
- Follow facilitators' instructions and respect session formats (e.g., speaking time, commenting rules).
- Assume positive intent; disagree with ideas, not people.

Not acceptable

- Harassment, discrimination, personal attacks, or demeaning language.
- Repeated attempts to influence editorial decisions outside the structured process (e.g., ad-hoc lobbying).
- Submitting confidential third-party data or IP without rights.

Enforcement

The Project Team may issue warnings, remove participants from activities, decline or revoke submissions, and—where agreements or NDAs are in place—pursue further remedies as appropriate. This supports the Inclusive & Structured Feedback Process and protects the integrity of DAMA-DMBOK® 3.0.

14) Accessibility & inclusion

We design engagement for **global participation** and **structured, fair input** across the eight activities (see the activity list and timing in §4). These practices support our Inclusive & Structured Feedback Process and Global Relevance & Content Excellence strategic objectives.

14.1 Principles

- **Inclusive by default.** Plan formats, timing, and materials so that people across regions, time zones, and abilities can participate.
- **Structured engagement only.** Contributions are accepted only through the eight activities; accessibility accommodations apply within those channels.
- **Traceable and transparent.** Accessibility requests and related accommodations are logged alongside submissions within the FMA lifecycle (Collect → Analyze → Integrate → Communicate).

14.2 Events & recordings

- We aim to provide **captions/transcripts** for recorded sessions and **accessible slide materials**.
- For live sessions, facilitators will: (a) explain participation mechanics at the start, (b) rotate speaking opportunities, and (c) moderate for respectful, inclusive discussion.
- If you require an accommodation (e.g., alternative format, additional support), contact us via §15; we'll confirm a reasonable approach for your situation.

14.3 Content submissions

- **Provide alt text** for images, avoid **color-only cues** in figures, and attach **editable source files** (PPTX/SVG/XLSX) so we can adjust for readability.
- Use **clear, inclusive language**; where you cite region-specific laws or practices, add brief context and sources to aid global readers.

14.4 Language & localization

- **Localization signals** are encouraged: flag terms that may not translate well or concepts that vary by region.
- Full **translations/localized glossaries** run via chapter programs under the Chapter Contribution Agreement. (Cross-ref §8.3.)

14.5 Data & privacy

- When sessions are recorded, this is disclosed in advance; by joining, you consent to recording and related processing for analysis (per §9).

14.6 Continuous improvement

- We monitor participation patterns (attendance, comment density, regional distribution) and adjust formats to close gaps. Results feed into bi-monthly briefs and sprint summaries.

15) Questions and support

Important: For fairness and traceability, we cannot accept contributions or editorial change requests by email or DM. Please submit only through the eight structured engagement activities listed in §4; emails are for coordination and support only.

General inquiries

- **Email: mathias.vercauteren@dama.org**
- Include: your name, organization/affiliation, the engagement activity you're referring to (e.g., Benchmark Survey, Focus Group R1), and a brief description of your question. We'll route it to the appropriate PMO/editorial contact.

Accessibility & inclusion

- If you require an accessible submission option or accommodation for a session (e.g., live captions, transcripts, accessible files, alternative submission path), contact us at the address above.
- Please provide the activity name, date/time (if applicable), and the accommodation requested; when possible, contact us **5 business days in advance** so we can coordinate effectively. We will confirm a reasonable approach for your situation.

Technical support (forms/portals/scheduling)

- If a survey, portal, or commenting platform isn't working, email the address above with the form URL, a screenshot, and a short description of the issue. Once resolved, you'll be directed to submit via the appropriate structured channel.

Chapter & translation programs

- For DAMA Chapters regarding translations, localized glossaries, templates, or guidelines, contact us via the address above. Note that translation work is **not** a public submission route; it is run under a separate **Chapter Contribution Agreement** and coordination process. (See §8.3.)

Code of Conduct or confidentiality concerns

- If you experience or witness behavior that conflicts with §14 (Code of Conduct) or believe confidential material has been mishandled, email the address above with **"COC/Confidentiality"** in the subject line. The PMO will review and respond in line with our governance and risk controls.

Status updates & community communications

- We publish **bi-monthly community briefs** and **sprint summaries** on the project site and share updates via newsletters/town halls—this is where you'll see how feedback was used and what's next.

16) Risk & issue reporting

We maintain a **structured channel** for reporting process risks and issues so we can protect the integrity of engagement and act quickly. This implements the controls on the **Risks & Mitigations** page (e.g., feedback overload, conflicting input, and IP clarity) and ties directly to our FMA cycle.

16.1 What to report

Report any concern that could undermine fairness, safety, or legal clarity, including:
- **IP clarity & contributor consent** (uncertain rights, missing declarations, suspected infringement).
- **Confidentiality** (accidental sharing of non-public materials or third-party secrets).
- **Process integrity** (off-channel lobbying, attempts to influence editors outside the eight activities, conflicts of interest not disclosed).
- **Code of Conduct** concerns (harassment, discrimination, unprofessional behavior).
- **Platform or data issues** (broken forms, mis-tagged submissions, visibility errors in comment maps).

These categories mirror the risk areas and mitigations defined for the program.

16.2 How to report (channels)

- **Email the support address in §15** with subject **"Process Risk/COC"** and include: submission/activity ID (if applicable), a short description, and any relevant screenshots.
- **Do not include sensitive secrets** or personal data beyond what is needed to describe the issue; if accidental disclosure has already occurred, see § 16.6 (Containment).
- Routine **content suggestions** should continue to go through the appropriate engagement activity (e.g., Always-Open Feedback Portal) rather than this risk channel.

16.3 What happens next (triage & escalation)

- **Logging & tagging.** The PMO logs the report, tags it by type and severity, and links it (if applicable) to the related submission(s) in our repository—consistent with the FMA "Collect" step.
- **Primary handling.**
  - **Process/platform** issues → PMO.
  - **Editorial conflicts** or vendor-bias concerns → Lead Editor / Editorial Board.
  - **IP/Confidentiality** → PMO with Legal support as needed.

- **Decision & action.** Actions may include correcting tagging, quarantining a submission, requesting clarifications, updating guidance, revising a session protocol, or (for COC/NDA breaches) removing a participant and pursuing remedies. Outcomes feed into the FMA "Integrate/Communicate" steps.

16.4 Fairness & non-retaliation

- Reports made in **good faith** are welcomed; we handle them discreetly and share details on a need-to-know basis. We focus on remediation and learning while upholding our Code of Conduct.

16.5 Transparency

- We report aggregate, de-identified risk trends and process changes in bi-monthly community briefs and sprint summaries.

16.6 Containment (if you accidentally shared something sensitive)

- **Immediately email** the address in § 15 with subject **"URGENT—Containment"**, include the activity/submission ID, and **do not repost** the material.
- We will quarantine the content, coordinate removal where possible, and advise on any follow-up.

17) Changes to these Guidelines

We may update these Guidelines to reflect process improvements, legal requirements, or project scope. The latest version will be published on the project site and reflected in our community updates.

How changes are managed

- **Versioning & dating.** Each update is date-stamped and versioned; a short changelog highlights what changed and why. Updates are communicated via our bi-monthly community briefs and website notices.
- **Material changes.** If we make material changes (e.g., to IP or confidentiality language), we will highlight them in community communications and, where appropriate, request renewed acknowledgment during the relevant engagement activity (e.g., on a submission form).
- **Alignment with the Engagement Strategy.** We try to align updates with the cadence of the eight engagement activities and editorial sprints so contributors have clear, predictable guidance.
- **Precedence.** These Guidelines summarize practices for transparency and onboarding. If there is any inconsistency between this page and a signed Contributor Agreement or Chapter Contribution Agreement, the signed agreement(s) govern.