

# SGIM Survey Policy

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## SGIM Membership Committee

For the purposes of this document, a survey is any query intended to collect data from SGIM members for research or informational purposes. These guidelines are written to apply to all ways of conducting a survey, including in person (i.e. Q&A), over the phone, by paper, or electronically.

### **SGIM Committees, Commissions, Work Groups & Members**

1. SGIM members in good standing may survey the membership using GIM Connect and the All Member Open Forum.
2. SGIM Committees, Commissions and Work Groups may survey the membership using GIM Connect.
  - a. **If the survey cannot be distributed using GIM Connect (target group is not the full membership or a community within GIM Connect), the Committee, Commissions, or Work Group must work with staff to determine if an email distribution list can be created from member data information.**
  - b. **As it is SGIM policy not to share large, member email contact lists, staff will assist with distribution if the survey is part of a Committee, Commissions, or Work Group initiative.**
  - c. **Surveys being distributed to a portion of the membership must be reviewed by the Membership Committee.**
3. SGIM staff will screen all surveys submitted through GIM Connect for appropriateness and content. Any surveys that are deemed inappropriate are rejected and removed. Any surveys for which the appropriateness is unclear will be referred to the SGIM Membership Committee for further review.
4. SGIM staff will be available to answer general questions regarding distribution of surveys via GIM Connect and will respond to any instances when a survey is rejected from distribution, but cannot assist in data collection or analysis unless it is part of a Committee, Commission, or Work Group initiative.
5. When appropriate, survey results and/or resulting publication will be shared with SGIM membership, either through the All Member Open Forum, Forum, or JGIM.
6. To minimize survey fatigue:
  - a. No surveys will be distributed to membership within 2 months of the SGIM Membership Survey period (every 2-3 years).
  - b. All surveys must be optional to members.
  - c. Survey reminders should be distributed no more than once per week.
  - d. All surveys should be completed within a timeframe of 30 days. Postings and reminders should not be distributed after 30 days.
7. Member contact information will not be provided to third parties for the purposes of survey of the membership.
8. **At the request of Annual Meeting Program Committee and Staff, in-person surveys of the membership at the annual meeting are not permitted.**

### **Non-Members/Organizations:**

Qualifying non-members/organizations are those that share a similar area of interest or mission and/or that SGIM has developed a collaborative relationship or project. Non-members/organizations who wish to survey the membership must comply with the following guidelines.

1. Surveys from Non-members/organizations must be conducted in collaboration a SGIM Committee, Commission, or Work Group. It is the surveyor's responsibility to contact

Committee, Commission or Work Group that best represents the survey's scope or mission. A full list can be found at <https://www.sgim.org/communities>

2. Surveys from Non-members/organizations must be reviewed and approved by the SGIM Membership Committee.
3. The process for approval of surveys from non-members/organizations is as follows:
  - Non-members/organizations must complete a Survey Request Form and identify a SGIM Committee, Commission, or Work Group as collaborator.
  - Survey Request Forms are reviewed by the identified SGIM Committee, Commission, or Work Group. Once reviewed by the identified Committee, Commission, or Work Group, the Survey Request Form is reviewed by the SGIM Membership Committee for approval.
  - Approved surveys are scheduled a timeframe for distribution through the All Member Open Forum.
  - A representative from the sponsoring Committee, Commission or Work Group must be willing to distribute and send reminders on your behalf as access to GIM Connect is restricted to members only.
4. Member contact information will not be provided to third parties for the purposes of survey of the membership.
5. Surveys from Non-members/organizations may be rejected at the discretion of the SGIM Membership committee.

**Survey Approval:**

Surveys may be rejected at the discretion of SGIM staff and Membership committee. Disqualifying factors include but are not limited to the following:

- The purpose or intended use of the survey is outside of the mission, vision, and values of SGIM. SGIM's mission, vision, and values can be found at <https://www.sgim.org/about-us/vision--values>
- The survey includes content that is addressed via the SGIM Membership Survey (demographics, satisfaction with the organization, etc.).
- The survey is intended to promote, recruit, or sell products, content, or services.
- The survey collects member names and contact information and that can be used for future contact outside of the approved channels.
- The failure to comply with these survey guidelines may result in the rejection of a survey request.

*Membership mailing lists (not including email address) may be rented through Marketing General Incorporated. All mailings are presented to SGIM for approval prior to purchase. Any mailing that includes a survey tool will be subject to these guidelines and can be rejected using the qualifying factors noted above.*

*Approved by Council: February 2015  
Revised: October 2021*

# SGIM Survey Request Form

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Submit to Muna Futur, Director of Member Relations – [futurm@sgim.org](mailto:futurm@sgim.org)

**Non-members/organizations who wish to survey the membership must comply with the following:**

Qualifying non-members/organizations are those that share a similar area of interest or mission and/or that SGIM has developed a collaborative relationship or project. Non-members/organizations who wish to survey the membership must comply with the following guidelines:

1. Surveys from Non-members/organizations must be conducted in collaboration a SGIM Committee, Commission or Work Group. It is the surveyor’s responsibility to contact Committee, Commission or Work Group that best represents the survey’s scope or mission. A list can be found at <https://www.sgim.org/communities>
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4. Member contact information will not be provided to third parties for the purposes of survey of the membership.
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<b>Please complete the following information and submit to Muna Futur at <a href="mailto:futurm@sgim.org">futurm@sgim.org</a></b>	
<b>Name:</b>	
<b>Title:</b>	
<b>Organization/Institution:</b>	
<b>Primary Contact Email and Phone:</b>	
<b>SGIM Committee/Commission/Work Group Sponsor:</b>	
<b>Date Approved by Committee/Commission/Work Group:</b>	
<b>Committee or Commission Representative for Distribution:</b>	
<b>Survey Summary and Purpose (include link to survey tool):</b>	
<i>Please select distribution timeframes that would be acceptable, if approved (must select more than one):</i>	
<input type="checkbox"/> Within the next 5-10 business days <input type="checkbox"/> Within the next 30 days <input type="checkbox"/> Within the next 60 days	
<i>For admin purposes only:</i>	
<input type="checkbox"/> Approved    Distribution Date: _____ <input type="checkbox"/> Rejected (reason) _____	

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- The purpose or intended use of the survey is outside of the mission, goals, and values of SGIM. To see SGIM's mission, goals, values visit <http://www.sgim.org/about-us/vision--values>.
- The survey includes content that is addressed via the SGIM Membership Survey (demographics, satisfaction with the organization, etc).
- The survey is intended to promote, recruit, or sell products, content or services.
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