

# OUT-PROC-01: Creating & Maintaining Alliance Agreements

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## Foreword

This document describes the “how” for outreach.

This procedure covers:

- Potential Alliance Agreements,
- Alliance Agreement Development,
- Conducting Joint Activities,
- Maintaining the Alliance Agreement,
- Alliance Agreement Addendum Updates, and
- Alliance Agreement Renewals

The procedures are described in this document. For more details on using the Outreach Alliance Relationship Management System (ARMS), please review the Outreach ARMS User’s Guide.

## Document Change History

The following table identifies each version or issue of this document and provides a description of the purpose or reason for the change. Performing a document comparison between any two versions of this document can identify detailed change differences.

Version	Date	Comment
0.1	02 May 2021	Initial draft version
0.2	05 May 2021	Updates from Outreach Director
0.3	17 Jun 2021	Updates from the President and incorporating Outreach ARMS
1.0	1 Jul 2021	Accepting all comments
1.1	11 Jun 23	Update prior to Outreach Director turnover
1.2	22 Aug 23	Incorporating information from retired OUT-100 & OUT-101 policies
1.5	25 Sep 23	Updated the final approval process

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## **1.0 Scope**

Outreach has been identified by INCOSE leadership as a key element that contributes to the Principles, Values and Strategic Objectives of the organization.

### **1.1 Purpose**

This procedure applies to creating and maintaining alliance agreements such as Memorandums of Understanding and Memorandums of Agreement, as well as the responsibilities to maintain the Outreach Alliance Relationship Management System (ARMS).

### **1.2 Background and Objectives**

Outreach has been identified by INCOSE leadership as a key element that contributes to the Principles, Values and Strategic Objectives of the organization by building relationships with other organizations in order to expand the influence and engagement of Systems Engineering. In turn, INCOSE will gain knowledge and learn from other organizations.

The objective of INCOSE Outreach is to identify these areas of overlapping best practice, interpret them for our membership, and promote complementary INCOSE knowledge externally. Through the formation of Alliances, the state of best practice may be improved through joint promotion and joint work programs. Alliances are formalized through the formation of written agreements, and each of these agreements exist in one of the forms defined below:

- A Memorandum of Understanding (MOU) is a non-binding agreement between two or more parties outlining very broad concepts of mutual understanding, goals, and general plans. An MOU is often the first stage in the formation of a Memorandum of Agreement (MOA) or more formal contract.
- A Memorandum of Agreement (MOA) is a non-binding agreement between two or more parties describing the terms, conditions, and specific details of an agreement, including each party's requirements, roles, responsibilities, and actions so that their goals may be accomplished. An MOA may lead to the formation of a formal contract among the parties.

Alliances and their more formal written agreements (MOUs and MOAs) are intended to be expressions of current mutual benefit to both organizations; to this end, they should have a fixed duration and auto-renewal should be avoided.

### **1.3 Outreach Scope**

The outreach focus is external to INCOSE. This includes other professional organizations, universities that are not part of the Academic Council, and current non-MOU and non-MOA organizations.

## 2.0 Definitions

### 2.1 Outreach

“Outreach” is defined as the set of undertakings to foster and promote systems engineering and INCOSE in the selected industry. These undertakings can be identified, coordinated, and supported by the Outreach Leadership Team, while the actual performance is distributed among the members, and to a large extent, are carried out by the Ambassadors and Relationship Managers during professional organization meetings and workshops. Specifically, establishing alliance agreements and Memoranda of Understanding (MOUs) / Memoranda of Agreement (MOAs) with relevant alliances are governed in section 4.2 Alliance Principles.

### 2.2 INCOSE Ambassador

An INCOSE ambassador is a member of INCOSE, representing the interest of INCOSE to different groups and entities and at non-INCOSE events. The ambassador will promote INCOSE and seek to enhance growth, collaboration, influence and/or achievement of INCOSE’s mission. The ambassador will be versed in the value streams and strategic objectives of INCOSE and will endeavor to build on these foundations with all external partners. (From Outreach Roles & Responsibilities document).

### 2.3 INCOSE <specific> Ambassador

For an ambassador identified for a specific role or group, this type of ambassador fulfills the obligations of an INCOSE ambassador as defined in the Outreach Roles & Responsibilities document.

An INCOSE Ambassador (defined in 2.2) has additional background or skills that can be utilized while working with a specific organization.

For example,

- An Industry Ambassador will focus on representing INCOSE to different Industry groups and entities and at Industry related non-INCOSE events.
- A Domain Ambassador will focus on representing INCOSE to different domains at Industry related non-INCOSE events.
- A Geographic Area Ambassador will focus on representing their INCOSE Sector Director at various events.
- A Membership Ambassador will represent INCOSE at events and meetings and be able to discuss the benefits and value of being an INCOSE member with the intent of growing membership through attraction and engagement strategies.

### 2.4 Relationship Manager (RM)

A Relationship Manager is an Outreach Ambassador that focuses on the relationship between INCOSE and the Alliance organization. They are responsible for keeping information on the

status of the relationship up-to-date in the Outreach Alliance Relationship Management System (ARMS).

## **2.5 Sponsor**

Related to Outreach, an INCOSE Sponsor is a member of the INCOSE Senior Leadership the Ambassador or Relationship Manager can contact when help is needed. The potential Sponsors are the President / President-Elect, Technical Director, Services Director, Director of Strategic Integration, and Chief Information Officer

## **2.6 Outreach Manager**

The specific Outreach Leadership role responsible for the relationship.

- Industry / Domain Ambassadors – Assistant Director for Industry & Domain Outreach
- Professional Society Agreements – Assistant Director(s) for Professional Society Outreach
- As required – Director of Outreach; Assistant Director for Outreach Operations, Training, and Support; and the Outreach ARMS Manager.

## **2.7 Memorandum of Understanding (MOU)**

A Memorandum of Understanding (MOU) is a non-binding agreement between two or more parties outlining very broad concepts of mutual understanding, goals, and general plans. An MOU is often the first stage in the formation of a Memorandum of Agreement (MOA) or a more formal contract.

## **2.8 Memorandum of Agreement (MOA)**

A Memorandum of Agreement (MOA) is a non-binding agreement between two or more parties describing the terms, conditions, and specific details of an agreement, including each party's requirements, roles, responsibilities, and actions so that their goals may be accomplished. An MOA may lead to the formation of a formal contract among the parties.

## **2.9 Outreach Alliance Relationship Management System (ARMS)**

A system created in SmartSheet for Relationship Managers to track all their alliance agreements and activities, and for the Ambassadors to track their activities. By doing so, the Outreach Leadership and the INCOSE Leadership can monitor the overall outreach status. Please see the INCOSE Outreach Alliance Relationship Management System (ARMS) User's Guide for more details. There are Outreach ARMS specific definitions in the Outreach ARMS Definitions sheet.

## **3.0 Responsibilities**

### **3.1 Responsible R**

The Responsible R is the Director for Outreach.

### **3.2 Accountable A**

The Accountable A is the President-Elect

### **3.3 Consulted C**

The Consulted C's are the potential Sponsors (with the President-Elect):

- President
- Technical Director
- Services Director
- Director for Strategic Integration
- Sector Directors

### **3.4 Informed I**

The Informed I's are:

- Secretary
- Treasurer
- Director for Academic Matters
- Director for Marketing and Communications
- Chief Information Officer
- Associate Director for Certification
- Associate Director for Events
- Associate Director for Publications
- Associate Director for Education & Training
- Associate Director for Diversity, Equity, and Inclusion
- Chief of Staff / Operations Manager
- Executive Director
- Policy Management Committee Chair

## **4.0 Potential Alliance Agreements**

The objective of INCOSE Outreach is to identify other organizations and entities which either complement INCOSE or have strong synergies with INCOSE.

### **4.1 Background**

Through the formation of Alliances, INCOSE seeks to continue to offer value to its members, by providing additional benefits through joint promotion and joint work programs. Alliances are formalized by the signed agreement of an MOU or MOA. Alliances are intended to be expressions of current mutual benefit. Alliances will be of fixed duration and are renewable upon expiration. A two-step approval process shall be used where (1) the intent to collaborate is approved at one level of the organization (see section 4.3.1), and (2) the formal collaboration agreement is subsequently approved at a higher level of the organization (see section 5).

Anyone can recommend a new alliance agreement. Entities within INCOSE, including chapters, working groups, technical committees, and administrative committees that are managed and budgeted through the INCOSE Board of Directors may recommend collaborative agreements. The objective of working with these organizations is to identify areas of overlapping best practice, interpret them for our membership, and promote complementary INCOSE knowledge externally. Through the formation of Alliances, the state of best practice may be improved through joint promotion and joint work programs. Alliances are intended to be expressions of current mutual benefit.

### **4.2 Alliance Principles**

Contact may be made with many potential alliance partners, originated either by one or more INCOSE members or by the external organization. INCOSE must then decide whether or not to pursue an alliance. The following criteria outline how a potential alliance shall be judged:

- (1) There must be alignment of Principles, Values, and Strategic Objectives between INCOSE and the other organization. INCOSE Principles, Values, and Strategic Objectives are published on the incose.org website.
- (2) There has to be a tangible purpose to the alliance which has a demonstrable benefit to both parties. This value proposition should be captured in an MOU, MOA, or similar agreement. Example outcomes from an alliance are:
  - (a) Mutual high-profile event participation with good promotional opportunities.
  - (b) Mutual access to the other organization's high-value products & resources.
  - (c) Joint Working Group products (e.g., interpreted ontology, tailored usage and competence profiles, tailored versions of the Systems Engineering (SE) Handbook or SE Vision document, or new shared knowledge).
  - (d) Joint training opportunities, such as webinars events, short courses, and training programs.
  - (e) Joint membership model.

- (3) The organization with which we partner shall have exploitable knowledge or products and / or services of equivalent or stronger intellectual credibility to those of INCOSE that have been vetted by the INCOSE Board of Directors (BoD). Examples of suitable, informed, and active INCOSE members to perform this assessment include INCOSE Fellows, Technical Operations, Services Operations, and Associate Directors.
- (4) Ideally, the products and services of the external organization should be made available to INCOSE members as a result of the alliance (and vice versa).
- (5) Any products developed under joint work with the allied organization should be made available to all members of both organizations.
- (6) There must be sufficient volunteer effort and resources available for INCOSE to meet its obligations under the agreement, and there must be high confidence that the target organization will also meet its obligations.

When someone is considering an alliance agreement, they should first review the INCOSE procedures and templates:

- OUT-PROC-01 Creating & Maintaining Alliance Agreements
- The appropriate alliance agreement template
  - ADM-TEMP-01 Chapter Memorandum of Understanding (MOA) Template
  - CER-TEMP-01 Corporation MOA Template
  - CER-TEMP-02 Academic Equivalency MOA Template
  - OUT-TEMP-01 Memorandum of Understanding (MOU) Template

OUT-PROC-01 Creating & Maintaining Alliance Agreements and OUT-TEMP-01 Memorandum of Understanding (MOU) Template are available via the Outreach iNet page (<https://www.incose.org/inet/discover-community-initiatives/outreach>) as shown in Figure 4-1.

After reviewing these documents, when an entity within INCOSE wants to recommend creating a formal collaboration with another organization, it should follow the instructions in OUT-PROC-01 Creating & Maintaining Alliance Agreements. The entity can also scroll down to the Outreach Alliance Relationship Management System (ARMS) Welcome Portal (Figure 4-2).

The dashboard has five areas to help the individual get started:

1. Top Left Section: Take Action – This section has links to various ARMS documents.
2. Bottom Left Section: Reference Materials – This section has many of the reference materials listed in the previous paragraph for Outreach.
3. Top Middle Section: Purpose – This section has the purpose of INCOSE Outreach from policy OUT-100 Outreach Principles.
4. Bottom Middle Section: Contact – This section has the main points of contact for Outreach ARMS.
5. Right Section: Feedback – In this section, you can provide feedback on your experience using Outreach ARMS.

[Return to INCOSE Home](#)

# INCOSE OUTREACH: ALLIANCES & PARTNERSHIPS

The Outreach team facilitates strategic alliances with organizations who share mutual goals and interests.

[Home](#) / [iNet](#) / [Outreach](#)

## Outreach Related Procedures, Templates, & Forms

These are useful documents for INCOSE Members & CAB Associates. Titles that are italicized & Underlined are available for download in the right-hand column.

### Alliances -


- [OUT-PROC-01 Creating & Maintaining Alliance Agreements](#) - The process to create & maintain alliances.
- OUT-TEMP-01 Memorandum of Understanding (MOU) Template - When you are ready to initiate or renew an alliance MOU, request a copy of the current MOU Template from the Outreach Director ([outreach\\_director@incose.net](mailto:outreach_director@incose.net)).


### External Events -


- [OUT-PROC-02 External Events](#): Awareness, Participation, and Support - This is the process to provide awareness on external events, what participants need to do before / during / after the event, and where to go to request support for the event.
- [FIN-FORM-01 Travel Request Form](#) - When INCOSE Members and CAB Associates are interested in participating in an external event representing INCOSE, individuals will complete this form and send to the Outreach Director ([outreach\\_director@incose.net](mailto:outreach_director@incose.net)).
- FIN-FORM-02 Expense Reimbursement Form - After the external event, the approved participants will submit this completed form with their receipts to the Outreach Director ([outreach\\_director@incose.net](mailto:outreach_director@incose.net)). \*Form Coming Soon\*
- [FIN-PROC-01 Expense Reimbursement Procedure](#) - The process for completing the FIN-FORM-02 Expense Reimbursement Form.
- [Event Ambassador Training Document](#) - Answers to basic questions on INCOSE for all Event Ambassadors (i.e., those that will "man" the INCOSE booth).


### Other Documents -


- [Outreach Roles & Responsibilities](#) - A document listing the roles & responsibilities for Outreach Ambassadors, Relationship Managers, and Leadership.
- [Outreach Ambassador Strategy](#) - The strategy for all appointed Outreach Ambassadors.


 [OUT-PROC-01 CreatingMaintainingAllianceAgreements V1.1 11June2023](#)  
(pdf)  
[Download](#) (626 KB)

 [OUT-PROC-02 ExternalEvents Awareness-Participation-Support Draftv1.0 14May23](#)  
(pdf)  
[Download](#) (571 KB)

 [FIN-PROC-01 ExpenseReimbursementProceduresV1.5](#)  
(pdf)  
[Download](#) (336 KB)

 [EventAmbassadorTraining Rev1 15May23](#)  
(pdf)  
[Download](#) (254 KB)

 [FIN-FORM-01 Travel Request Form](#)  
(docx)  
[Download](#) (72 KB)

 [OutreachAmbassadorStrategy 9June23](#)  
(pdf)  
[Download](#) (173 KB)


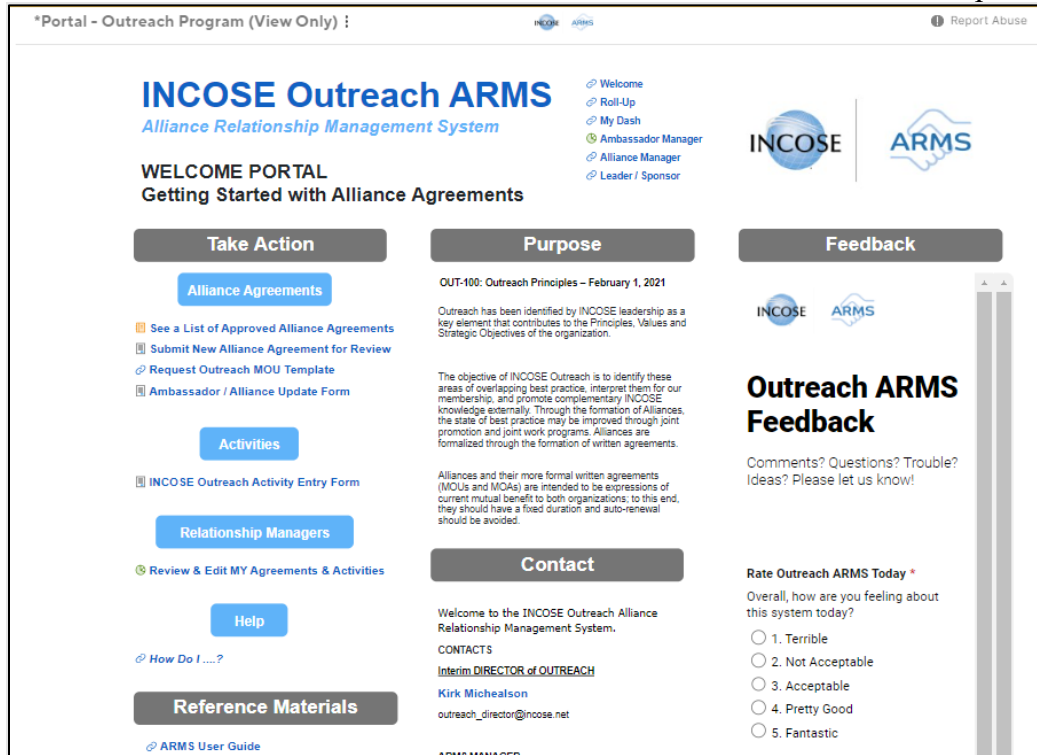
 [OutreachTeamRoles-Responsibilities 2August23](#)  
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Figure 4-1 Outreach Intranet Page

*This document contains INCOSE Proprietary Information.*

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**Figure 4-2 Outreach ARMS: Welcome Portal Dashboard**

### 4.3 Intent to Collaborate

After reviewing the background procedures and templates, when an entity within INCOSE wishes to form a formal collaboration, it should go to the Take Action section in the top left section of the Welcome Portal and click the “Submit New Alliance Agreement for Review” link under Alliance Agreements. When the form opens, enter:

- Your name,
- Your email address,
- The Alliance’s Acronym,
- The Alliance Organization Name
- To learn more about the potential alliance agreement, please enter all you can for the “Intent to Collaborate” comments. They are listed on the “Submit New Alliance Agreement for Review” form and listed here:
  - Proposed collaboration description,
  - Justification,
  - Objectives satisfied,
  - Anticipated joint activities/products,
  - Dependencies, risks, and issues,
  - Anticipated schedule,
  - Relationship to existing/planned products/activities, and
  - (If known) Names of INCOSE/partner Relationship Managers (RMs) – NOTE, the INCOSE RM must be identified prior to the alliance agreement being signed by both



organizations. The Relationship Manager should be from an INCOSE organization that is budgeted and managed by an INCOSE Board Member.

- The Planned Agreement Type
  - MOUs are when INCOSE initiates the alliance agreement using OUT-TEMP-01.
  - MOAs for Certification / Chapter agreements.
  - TBD if unknown at the time of submission.
  - Organization Agreement if the alliance is initiating the agreement.
- Outreach Manager (from the Outreach Leadership Team)
  - If unknown, then select the Outreach Director or Outreach ARMS Manager.
  - They will ensure the respective Assistant Director is selected.
- (If known) the Alliance Contact's Name and Email.

If a copy of your submission is desired, check the “Send me a copy of my responses” box and then click the submit button. When the submit button is clicked the information will be added in a row in the Outreach Alliance Agreement Portfolio sheet in Outreach ARMS with an Agreement Status of “Submitted.”

#### **4.4 Presenting the Collaboration Opportunity for Approval**

When the submitter clicks the submit button, an email will go to the Outreach Manager selected with all the information and the opportunity to click a button where the request is approved or denied. The Outreach Manager will inform the Director of Outreach, and the Director of Outreach will inform the President, President-Elect, Technical Director, Services Director, Director of Strategic Integration, and Executive Director (as appropriate) to determine if there are any concerns and / or recommendations.

- If there are no concerns, then the Outreach Manager clicks the approved button, and the submitter receives an approved to explore email. The Approval Status changes to “approved” and the Outreach Manager will update the Agreement Status to “Approved to Explore,” and will work with the submitter to start the alliance agreement using the appropriate MOU/MOA template.
- If there are concerns and the INCOSE Leadership does not approve the alliance, the Outreach Manager clicks the denied button, and the submitter received a denied email. The Approval Status changes to “Denied” and Outreach ARMS changes all the text in the row to strikethrough text.

## 5.0 Alliance Agreement Development

After the request to initiate an alliance agreement was approved, the submitter will contact the potential alliance to coordinate an initial meeting.

### 5.1 Initial Contact with the Potential Alliance Organization

The initial contact should include the objective(s) of working together, the value / benefits of a collaboration, and potential times for an initial meeting. During the first meeting, each organization should provide an overview of their organizations, and INCOSE should offer some ideas for working together such as those listed in OUT-TEMP-01 Memorandum of Understanding (MOU) Template:

- Implementation of a joint cross-organizational Working Group.
- Offer jointly [purpose / task]-focused events and to stimulate cross fertilization.
- Provide mutual assistance and support for international standards.
- Mutually support specific, non-funded, events of each organization.
- Develop jointly new processes, methods, guidance and tools in the field of [field name].
- Develop a joint approach for interfacing with other organizations in related professional areas.
- Develop discipline-specific or domain specific variants or extensions of a Competency Framework.
- Develop discipline-specific or domain specific variants or extensions of the INCOSE SE Handbook and the SE Vision 2025.
- Integrate [capability] within the Model Based System Engineering initiative with the support and contribution of [Organization name].
- Plan and develop a series of articles, papers and presentations for their respective membership publications, events and general promotion of the benefits of joint approaches.

The INCOSE Leadership Team will update this potential alliance by providing additional notes in the “Intent to Collaborate” column in Outreach ARMS. The most recent entry should be at the top starting with a date (i.e., DD MMM).

### 5.2 Follow-Up Meetings

Follow-up meetings will be conducted as necessary to further discuss the potential collaboration areas and start developing the appropriate Memorandum of Understanding or Memorandum of Agreement. During these meetings, conversations will be held on specific areas of responsibility for each organization on who (1) will take the lead on \_\_\_\_\_, (2) will promote \_\_\_\_\_, (3) will do \_\_\_\_\_ at their events, and (4) will provide \_\_\_\_\_.

NOTE: INCOSE doesn't stop a collaboration from occurring if we don't have an MOU in place. In fact, in some cases, it may be very well that the alliance doesn't warrant an MOU at the onset. We need to be clear, however, that we must have an agreement if there is any joint collaboration where IP and ownership is involved, and / or where money is involved.

In addition to the Outreach Leadership Team, other individuals that should participate in these meetings include:

### **5.2.1 Approval Authority –**

Any formal MOU or MOA documenting an alliance on behalf of INCOSE at the international level shall be approved and signed by the INCOSE President or Executive Director with the advice of the appropriate director(s).

- Any MOU or MOA with Standards Bodies & Government Agencies shall require the approval of the Technical Director.
- Any MOU or MOA with a Professional Institution or Industry Association shall require the approval of the Technical Director, Services Director, or the Director for Outreach, whichever is the most appropriate authority.
- Any MOU or MOA with an Academic Institution (for research, education, and training delivery, for example) shall require the approval of the Director for Academic Matters.
- Any MOU or MOA with a Company or Corporation shall require the approval of the Corporate Advisory Board.

Alliances, MOUs, or MOAs with similar objectives are encouraged for Standards Bodies / Government Agencies, Academic Institutions, Corporations / Companies, and Professional Institutions / Industry.

### **5.2.2 Relationship Manager –**

If not already completed, a Relationship Manager (RM) or co-Relationship Managers need(s) to be identified. The RM should be from the INCOSE Organization that is budgeted and managed by an INCOSE Board Member. They need to understand what areas INCOSE, and the other organization are planning to collaborate.

Once identified, the Outreach Leadership Team will provide an overview of the RM duties and responsibilities, as well as training on the Outreach Alliance Relationship Management System (ARMS).

### **5.2.3 INCOSE Board Members –**

Depending on what areas are being considered for collaboration, the following Board Members will be invited:

- Associate Director for Certification
- Associate Director for Events
- Associate Director for Publications
- Associate Director for Education & Training
- Associate Director for Membership Engagement
- Associate Director for Diversity, Equity, and Inclusion
- Chief of Staff / Operations Manager

- Executive Director

### 5.3 Alliance Agreement Approval

Once there is agreement in principle for collaboration, the Relationship Manager will use the appropriate MOU / MOA template to draft the alliance agreement. When drafted, the RM will send to their counterpart from the alliance to review and update.

Once both the INCOSE Relationship Manager and their Alliance counterpart agree on the contents in the MOU, they will each provide to their leadership for review. The INCOSE RM will send it to the Outreach Leadership Team for review. If the Outreach Leadership Team agrees, the Outreach Director will brief the INCOSE President, President-Elect, and Executive Director on at least the value to each other, the mutual benefit of the alliance, and what explicitly INCOSE will get out of the relationship. If there are any comments, the draft MOU will be updated and then the RM will send it back to their alliance counterpart to see if there are any additional comments.

When both sides agree in principle, the alliance will sign the MOU first and then send it to the INCOSE Relationship Manager. The RM will forward to the Outreach Director who will coordinate with the Executive Director to sign the document for final approval. Depending on the organization, the alliance agreement review and approval process could take several iterations. If the INCOSE Relationship Manager hasn't heard back from their counterpart in 2-3 weeks, they should reach out to them and ask for a status.

The alliance agreement is signed by the INCOSE Executive Director. When the alliance agreement has been approved by both sides:

- The Operations Manager will
  - Make a pdf copy, title it “(Organization Name)-INCOSE MOU\_DD MMM YYYY.pdf”, and post it in the Alliance Agreements channel in Outreach Teams in the Active Agreements folder.
  - Provide a link to the MOU in Outreach ARMS.
  - Signed MOU pdfs will be available to INCOSE members upon request.
- The Relationship Manager will
  - Go to the Outreach Welcome Portal Dashboard and click the “Ambassador / Alliance Update Form” link in the Take Action section under Alliance Agreements.
  - In the “Ambassador / Alliance Update Form,” enter the following:
    - Outreach Role – Select Relationship Manager,
    - Alliance Acronym and Alliance Organization Name,
    - Select the Agreement Type from a pull-down menu,
    - Agreement Execution Date,
    - Based on the duration (normally 3 years), the Agreement Expiration Date,
    - INCOSE Relationship Manager name (your name),
    - INCOSE Sponsor (President / President-Elect, Technical Director, Services Director, or Director of Strategic Integration),
    - Select the Outreach Team Manager from the pull-down menu,
    - Alliance Contact's Name and Email,

- Change the Alliance Agreement Status to “Agreement Executed,”
- Updated comments in the “Intent to Collaborate” Comment’s block – start with date (i.e., DD MMM) and then enter the information updated information, and
- If any files, upload the files.

If a copy of your submission is desired, check the “Send me a copy of my responses” box and then click the submit button. For the alliance, Outreach ARMS will automatically update with the new information.

## **6.0 Conducting Joint Activities**

The listing in Addendum A of the joint Memorandum of Understanding (MOU) are the possible joint activities that could be accomplished during the life of the MOU. The INCOSE Relationship Manager will work with the INCOSE Leadership to determine interest for potential joint activities while their point of contact from the organization will do the same on their side. Then the two of them will meet to discuss potential synergies.

### **6.1 Joint Activities**

In addendum A of the alliance agreement, there is a list of potential joint activities that may be conducted between the Alliance and INCOSE.

#### **6.1.1 Planning Joint Activities**

When a joint activity is agreed to on both sides, a joint meeting is held with the appropriate participants from each organization to outline terms, roles, and responsibilities for deliverables from an operational, IT, marketing, and communications perspective. A pathway forward is stipulated that defines the specific details. This project plan will include the next steps and who will be managing this the commitment from each organization. Normally, the INCOSE Relationship Manager(s) and their organization's counterpart Point of Contact will co-lead the planning and manage the commitments.

Information on what to include in the Outreach Activity Entry Form (section 6.1.2), requesting MARCOM support (section 6.2), and special considerations for events (section 6.3) are included in the following sub-sections.

#### **6.1.2 Alliance Agreement Addendum Updates**

When a specific activity in Addendum A of the alliance agreement is starting, additional addendums to the alliance agreement with the details from section 6.1.2 should be created for some activities. When an additional addendum is being created, the entire alliance agreement does not have to be re-approved and re-signed by both organizations but the additional addendum(s) should be signed on. The Operation Manager will create a pdf of the Addendum and add it to the original MOU.

##### ***6.1.2.1 Events***

Events is one area where an addendum should be created. Discussion items would include advertising, discounted fees, who will take the lead, who will be responsible for planning and executing the event, etc.

### **6.1.2.2 Publications**

Publications is another area where an addendum should be created. Discussion items would include who owns the Intellectual Property (IP), revenues and fees, who will take the lead, who will be responsible for planning and developing the material, etc.

### **6.1.2.3 Other Activities**

For other activities, if the Relationship Manager is not sure whether to create an additional addendum, reach out to the Outreach Leadership Team and the agreement Approval Authority.

## **6.1.2 When Activities Start Enter in Outreach ARMS**

When planning an activity starts, the Relationship Manager will go to the Welcome Portal Dashboard and click the “INCOSE Outreach Activity Entry Form” link under Activities in the Take Action section on the Welcome Portal Dashboard. The INCOSE Outreach Activity Entry Form will open. The Relationship Manager enters the following information:

- Outreach Role – Select Relationship Manager
- Alliance Acronym and Alliance Organization Name,
- Relationship Manager’s Name and Email,
- INCOSE Sponsor,
- Outreach Manager,
- Activity Type – see Figure 6-1 for the list of activity types, activity description, and the respective INCOSE Leadership for the activity type,
- Activity Status of “Started,”
- Activity Description – a description of the activity,
- Activity Comments – any comments related to the activity,
- Depending on the Activity Type, some of the following will be available to answer:
  - Key Dates & Descriptions 1-3 – can enter up to 3 dates and list what they are for.
  - MARCOM Coordination Status – if you need marketing or advertising.
  - (Specific) Coordination Status – what the specific status is contacting and working with MARCOM.
  - INCOSE / Partner Advertising – if advertising will be provided for events.
  - INCOSE / Partner Discounts (# and %) – if any discounts, how much.
  - File Upload – if any files to upload

If a copy of your submission is desired, check the “Send me a copy of my responses” box and then click the submit button. When the submit button is clicked the information will be added in a row in the Outreach Alliance Agreement Activity Log sheet in Outreach ARMS. Based on the Activity Type selected, an automatic email alert is sent to the respective INCOSE Leadership in the third column of Figure 6-1 stating the activity is started, providing information about the activity, and if they have any questions, to contact the Relationship Manager.

## **6.2 Working with MARCOM**

As provided in OUT-PROC-02 External Events: Awareness, Participation, and Support, there are Marketing and Communications forms to complete to request support from the MARCOM Team.

### **6.2.1 Market Campaign Request Form**

If you would like a marketing campaign for your joint event, you can provide more details to the Marketing and Communications Team using the Market Campaign Request Form (<https://app.smartsheet.com/b/form/0cbbdff532a14de196ba97fca1d981b8>). The following information is requested:

- Requestors names and emails,
- Short name for the request (e.g., NAFEMS 2023),
- The type of campaign requested (i.e., Event Promotion, New INCOSE Initiative Promotion, New Product Release Promotion, Sponsorship Promotion, or Other),
- Community Name (i.e., INCOSE Organization – chapter, working group committee, etc.),
- Will you require assistance from the MARCOM Design Team (e.g., Banners, Flyers, Graphics, Social Media Posts, Logos, etc.),
- Request description,
- Do you have any budget allocated or available to support this campaign?,
- Requested due date (request more than 30 days notice, if less than 30 days notice there is a check box to click for URGENT), and
- If you have attachments, you can upload them.



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Activity Category	Activity Type	Activity Description	Role
Events	<b>Joint Events</b>	<i>Joint Events</i>	AstD Events Portfolio Events, Associate Director Services, Deputy Services, Director
Events	<b>Other Events</b>	<i>Support Specific Focus Events of Other Organization</i>	AstD Events Portfolio Events, Associate Director Services, Deputy Services, Director
Process Methods & Tools	<b>Develop Tools</b>	<i>Jointly Develop New Process, Methods, Guidance, Tools</i>	PMC Chair Tech Ops, Deputy Tech Ops, Director
Process Methods & Tools	<b>MBSE</b>	<i>Participate in the Model Based Systems Engineering (MBSE) Project</i>	Tech Ops, Deputy Tech Ops, Director
Professional Development	<b>Professional Development</b>	<i>Collaborate Developing SE Professional Development Capability</i>	AscD Certification Education & Training, Associate Director Professional Development Portal, Project Manager Services, Deputy Services, Director
Professional Development	<b>SE Competency Framework</b>	<i>Develop Discipline &amp; Domain-Specific Extensions to SE Competency Framework</i>	Competency Working Group, Chairs Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Handbook</b>	<i>Develop Extensions to the SE Handbook and SE Vision 2025</i>	Publications, Associate Director SE Handbook, Lead Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Vision</b>	<i>Updates to the SE Vision</i>	President-Elect SE Vision, Lead
Publications	<b>Joint Papers</b>	<i>Develop Joint Articles, Papers, and Presentations</i>	Publications, Associate Director Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Publications	<b>Webpage / Products</b>	<i>Host Webpage, Post Documents, Develop Products</i>	Chief Information Officer Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Standards	<b>Standards</b>	<i>Support International Standards</i>	Standards, Lead Tech Ops, Deputy Tech Ops, Director
Tech Ops	<b>Joint Working Group</b>	<i>Joint Cross Organizational Working Group</i>	Tech Ops, Deputy Tech Ops, Director
Tech Ops	<b>FuSE</b>	<i>Participate in FuSE Initiative</i>	FuSE Initiative Leads President President-Elect
Other	<b>Related Professional Area</b>	<i>Joint Approach Interfacing in Related Professional Areas</i>	AstD Domain Outreach AstD EWLSE Outreach AstD Industry Outreach AstD Outreach Operations and Training AstD Professional Society Outreach Outreach, Director
Ambassador Activities	<b>Meeting</b>	<i>Ambassador attending meetings</i>	AstD Domain Outreach AstD Industry Outreach
Ambassador Activities	<b>Symposium</b>	<i>Ambassador attending symposia</i>	AstD Domain Outreach AstD Industry Outreach
Ambassador Activities	<b>Conference</b>	<i>Ambassador attending conferences</i>	AstD Domain Outreach AstD Industry Outreach
Ambassador Activities	<b>Workshop</b>	<i>Ambassador attending workshops</i>	AstD Domain Outreach AstD Industry Outreach

**Figure 6-1 Outreach ARMS: Activity Reference List**

### **6.2.2 INCOSE Promotional Merchandise Requests Form**

If there are requests for promotional merchandise for an exhibit / booth, then submit the INCOSE Promotional Merchandise Requests Form

(<https://app.smartsheet.com/b/form/7cf54a843a324093afc4b80ba7fb32a6>). The following information is requested:

- Requestors names and emails,
- INCOSE Member ID number,
- What chapter of working group are you a member of (This should be the group that you are requesting these items on behalf of),
- Why do you need these materials?,
- What INCOSE merchandise would you like (select all that apply),
- Full address for shipping (Please note that this will be shipped to the contact person above unless otherwise specified here. Include all Postal Codes, Country Codes and Country.), and
- Any other information you wish to include.

### **6.2.3 Branding**

For all items published, products developed, etc., the MOU organization's and INCOSE's branding should be used. Ensure that is included in the MOU. Then, when you need branding, contract MARCOM.

### **6.1.3 Special Considerations for Events**

In Addendum A, when discussing joint events, the following should be specifically identified:

- Whether or not to have free exhibit / both at each other's conferences and the number of people free to "man" the booth at the events (they will not be able to attend presentations).
- Specifics about free / reduced registration fees for members at each other's events (i.e., the number free, the number at a reduced rate, and what the reduced rate will be).

These special considerations for events should also be in the new addendum for the joint activity.

## **7.0 Maintaining the Alliance Agreement**

At least monthly, the Relationship Manager will update the status of their alliance agreement and any activities started.

### **7.1 Alliance Agreement Updates**

#### **7.1.1 Alliance Agreement Monthly Updates**

While the alliance agreements are active, Relationship Managers are responsible to update the status of their agreement monthly. An Agreement Update Request Alert email is sent to the Relationship Manager monthly on the 10<sup>th</sup> of the month requesting an update. The RM will go to their My Alliance Agreements & Activities Dashboard (My Dash in the top right of any dashboard or click the “Review & Edit My Agreements & Activities” link under Relationship Managers in the Take Action section of the Welcome Portal Dashboard), double click the “My Approved Alliance Agreements” report and enter the updated status in the “Intent to Collaborate” Comments cell. The most recent entry will be at the top of the cell starting with the date (DD MMM). After the update is submitted, ensure you click the save icon in the top left of the report.

#### **7.1.2 Alliance Agreement At Risk Alerts**

If the Relationship Manager needs help with their alliance agreement, they go to their My Alliance Agreement & Activities Dashboard (My Dash in the top right of any dashboard or click the “Review & Edit My Agreements & Activities” link under Relationship Managers in the Take Action section of the Welcome Portal Dashboard), double click the “My Approved Alliance Agreements” report and change the Agreement Status to “In Progress – Help!”. This will activate the “At Risk” Flag and send an automatic email to the Relationship Manager, Sponsor, and the respective Outreach Manager basically stating the RM needs help.

#### **7.1.3 Additional Alliance Agreement Alerts**

In addition to the monthly update alert, there are two other alerts that could be automatically generated while the alliance agreement is active.

- 45-Day Alert – If the RM does not do their monthly update and it’s been 45 days since an updated has been complete, an alert goes to the RM and the respective Outreach Manager requesting an update.
- New Assigned Alliance Relationship Manager Alert – When a new Relationship Manager is assigned, an email alert is sent to the new RM, Sponsor, and respective Outreach Manager.

### **7.2 Activities**

In addendum A of the alliance agreement, there are a list of potential joint activities that may be conducted between the Alliance and INCOSE.

### **7.2.1 Activity Monthly Updates**

While their activities are active, Relationship Managers are responsible to update the status of each activity monthly. An Activity Update Request Alert email is sent to the Relationship Manager monthly on the 10<sup>th</sup> of the month requesting an update. The RM will go to their My Alliance Agreements & Activities Dashboard (My Dash in the top right of any dashboard or click the “Review & Edit My Agreements & Activities” link under Relationship Managers in the Take Action section of the Welcome Portal Dashboard), double click the “My Approved Activities” report and enter the updated status in the Activity Comments cell. The most recent entry will be at the top of the cell starting with the date (DD MMM). After the update is submitted, ensure you click the save icon in the top left of the report.

### **7.2.2 Activity Updates**

When the activity status changes, the Relationship Manager goes to either the INCOSE Outreach Alliance Activity Entry Form (available through the Welcome Portal Dashboard) or the My Activities report in the My Alliance Agreements & Activities Dashboard and changes the Activity Status to either In Progress – Update, Complete, Cancelled, or Hold, as appropriate. When the activity status changes, an automatic email alert is sent to the respective INCOSE Leadership for the activity type as listed in Figure 6-1. The email will provide all current information.

### **7.2.4 Activity At Risk Alerts**

If the Relationship Manager needs help with an activity, they go to their My Alliance Agreement & Activities Dashboard (My Dash in the top right of any dashboard or click the “Review & Edit My Agreements & Activities” link under Relationship Managers in the Take Action section of the Welcome Portal Dashboard), double click the “My Approved Activities” report and change the Activity Status to “In Progress – Help!”. This will activate the “At Risk” Flag and send an automatic email to the Sponsor, and the respective Outreach Manager basically stating the RM needs help.

## **8.0 Alliance Agreement Renewal**

At least 6 months before the expiration date, the Relationship Manager should reach out to the Outreach Leadership Team and the agreement Approval Authority to determine if the agreement should be renewed or not.

### **8.1 Pending Alliance Agreement Expiration**

Starting 6 months before the alliance agreement expiration date, an automatic email alert is sent to the Relationship Manager, Sponsor and respective Outreach Manager to discuss if the alliance would be renewed. Until the agreement is either renewed or expired, additional pending alliance agreement expiration alerts are sent automatically monthly (i.e., 6, 5, 4, 3, 2, and 1 months before expiration). During this time the Relationship Manager should go to their My Alliance Agreements & Activities Dashboard (My Dash in the top right of any dashboard or click the “Review & Edit My Agreements & Activities” link under Relationship Managers in the Take Action section of the Welcome Portal Dashboard), double click the “My Approved Alliance Agreements” report and change the Agreement Status to “Renewal Under Evaluation.”

### **8.2 INCOSE Internal Discussions**

The first step is for the RM to meet with the Outreach Leadership Team, the Sponsor, the agreement Approval Authority, and as appropriate, other Board Members to discuss whether to renew the alliance agreement or not. If the agreement is to be renewed,

- Will the Relationship Manager continue in the role (if not, a replacement will need to be identified)?
- Will all the activities in Addendum A be included? If not, which ones to remove?
- Will any new activities be added to Addendum A?

### **8.3 Renewal Discussions with the Other Alliance**

The next step is to provide the other organization the new alliance agreement for review and approval. Just like the first time, there may be several iterations back and forth before the agreement is signed by both sides.

### **8.4 Renewed Alliance Agreement Approved**

The renewal will go through the same process for signature as described in section 5.3 for the initial approval. The alliance agreement is signed by the INCOSE Executive Director. When the renewed alliance agreement is signed by both organizations:

- The Operations Manager will
  - Make a pdf copy and post it on the Connect Home Page in the “Liaisons with Other Organizations” folder in the Document Libraries Section (2<sup>nd</sup> row, 3<sup>rd</sup> folder from the left) replacing the old version and
  - Forward the master copy to the Outreach Leadership Team.

- The Relationship Manager will
  - Update the “Outreach Alliance Agreement Portfolio” sheet in Outreach ARMS entering the following information:
    - Updated effective date and expiration date.
    - If new, update the Relationship Managers Information: Name, email, and phone for both organizations.
    - Update other information, as necessary.

## **8.5 Renewed Alliance Agreement Disapproved**

When the renewal of the alliance agreement is disapproved:

- The Operations Manager will
  - Move the alliance agreement pdf from the Active list to the Archived list in the Liaisons with Other Organizations folder on the Connect Home page.
- The Relationship Manager will
  - Update the “Outreach Alliance Agreement Portfolio” sheet in Outreach ARMS entering the following information:
    - Change the Agreement Status to “Expired.”

## References

### **REF-1 INCOSE Procedures, Templates, and Forms**

ADM-TEMP-01 Chapter Memorandum of Understanding (MOA) Template  
CER-TEMP-01 Corporation MOA Template  
CER-TEMP-02 Academic Equivalency MOA Template  
OUT-PROC-02 External Events: Awareness, Participation, and Support  
OUT-TEMP-01 Memorandum of Understanding (MOU) Template

### **REF-2 Other References**

INCOSE Outreach Alliance Relationship Management System (ARMS) User's Guide