



BOD-300: Collaborations - January 25, 2012

INCOSE strongly encourages professional collaboration such as the creation of professional agreements between INCOSE entities and other organizational entities external to INCOSE for information exchange (as defined in TEC-101), joint projects, standards development, or other professional purposes. To support INCOSE entities in promoting collaboration, this policy defines the collaboration agreement and the approving authority. All agreements shall be reported to the Associate Director for Collaboration.

Any organizational entity within INCOSE, including chapters, working groups, technical committees, and administrative committees may be a party in a collaborative agreement. These entities shall obtain the approval of the Associate Director for Collaboration before committing or providing the INCOSE logo, any INCOSE intellectual capital, any INCOSE proprietary data, or the services of the Administrative Office.

Any formal collaborative agreement between an INCOSE entity, other than a Chapter, shall be established through the Associate Director for Collaboration with the INCOSE President serving as the approval authority.

An INCOSE Chapter may establish a formal collaborative agreement with an external organization's commensurate¹ chapter with the INCOSE Chapter President, or their designee, serving as the approval authority. The Chapter President, or their designee, shall ensure that the collaboration agreement details and its status are shared with their Sector Director. When an entity within INCOSE decides to form a formal collaboration, that entity shall provide a completed *Intent to Collaborate* form to the Associate Director for Collaboration which includes:

- a. Names of the collaborating organizations
- b. Proposed collaboration description
- c. Justification
- d. Objectives satisfied
- e. Anticipated joint activities/products

¹ Commensurate as it is used here means the corresponding organizational chapter/entity in the external organization that is comparable to a chapter within INCOSE. An example of a non-commensurate chapter/entity would be an INCOSE Chapter collaborating with the Board of Directors of an external organization.



- f. Dependencies, risks, and issues
- g. Anticipated schedule
- h. Relationship to existing/planned products
- i. Names of INCOSE/partner representatives

Upon approval of the *Intent to Collaborate* by the Associate Director for Collaboration, a formal *Memorandum of Understanding*, *Memorandum of Agreement* or other appropriately titled agreement, shall be drafted by the INCOSE entity to the satisfaction of each collaborating party. The Associate Director for Collaboration shall submit the agreement to the INCOSE Board of Directors. The agreement must be approved by the INCOSE President and the other party's appropriate level of authority before any collaboration activities may begin. The formal agreement shall include the following:

- a. Statement of purpose and objectives
- b. Description of information/products to be produced / exchanged
- c. Ground rules for initiative, ownership, implementation, and termination of joint projects/products
- d. Ground rules for sharing and distribution of completed projects/products
- e. Methods for settling any disputes
- f. Ground rules related to standards development and distribution
- g. Ground rules related to copyrights, intellectual property and sales rights
- h. Terms of termination of the agreement

The Associate Director for Collaboration shall provide *Memorandum of Understanding*, *Memorandum of Agreement* and *Intent to Collaborate* templates. These templates shall be available from the INCOSE Administrative Office.

Once the formal collaborative agreement is approved, and the agreement is signed by both parties, it shall be filed with the INCOSE Administrative Office.

The approving authority may end an agreement at any time in accordance with its terms of termination.



SUPERSEDES: TEC-102 dated February 2, 2011

APPROVED BY: INCOSE Board of Directors, Jacksonville, Florida, USA, January 25, 2012

MAINTAINED BY: Director of Strategy