



OUT-100: Outreach Principles – January 24, 2018

Background and Objectives

There still remain many parts of the world, and industrial domains, where INCOSE is unknown or has only minimal presence. Nevertheless, there are strong systemic practices in place, which overlap with those of INCOSE but are governed by others with complementary expertise.

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 by joint promotion and joint work programs. Alliances are formalized by the agreement of a Memorandum of Understanding (MOU). The term MOU is used throughout this Policy, although in some places similar documents have been set in place using different terminology, for example Memorandum of Agreement. MOUs and Alliances are intended to be expressions of current mutual benefit; to this end, they should have a fixed duration, and auto-renewal should be avoided.

Outreach Scope

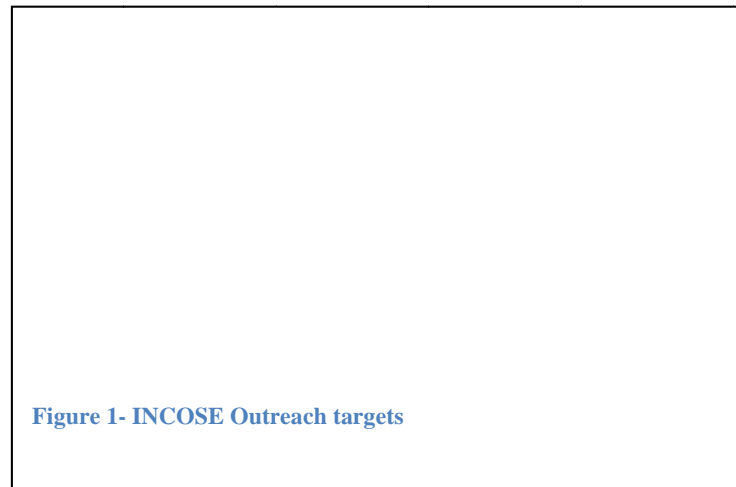


Figure 1- INCOSE Outreach targets

Five categories of organizations to which INCOSE may consider an Alliance have been identified, and are shown in Figure 1. Each will have different types of objectives and outcomes / products from the Alliance, and different mechanisms for creation, management and approval of the relationship. Guidelines for treatment of each, at International level, will be found in Policy OUT-101.

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 decide whether or not to pursue an Alliance: the following are the criteria by which this shall be judged.

1. There must be alignment of Goals, Values and Principles between INCOSE and the target Organisation. INCOSE Mission and Goals 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 or similar agreement. Example outcomes from an Alliance are:



- i. Mutual high-profile event participation, with good promotional opportunities
- ii. Mutual access to the other organisation's high-value products & resources
- iii. Joint Working Group products, e.g. interpreted ontology, tailored usage and competence profiles, tailored versions of the SE Handbook or SE Vision document, new shared knowledge
- iv. Joint membership model.

More detailed guidelines for the formation and approval of Alliances and MOUs will be found in Policy OUT-101.

3. The organisation with which we ally should prove that they have exploitable knowledge, products and / or services, of equivalent or stronger intellectual credibility to those of INCOSE, that have been vetted as such by INCOSE experts. Examples of suitable INCOSE experts are Fellows and Technical Operations Associate Directors.
4. The products and services of the external organisation should ideally be preferentially available to INCOSE members as a result of the Alliance (and vice versa).
5. Any products of joint working with the Allied organisation should be preferentially available to all members of both organisations.
6. There must be sufficient volunteer effort and resource available for INCOSE to discharge its obligations, and there must be confidence that the target organisation should be able to discharge their obligations likewise.
7. INCOSE shall only explore and establish alliances with organisations that comply with the requirements of the INCOSE Countries of Concern chart.

Authority to Implement Alliances

Any formal Memoranda of Understanding (MOU) documenting an Alliance on behalf of INCOSE at international level shall be approved and authorized by the President. In addition, approval to seek an Alliance, and to sign off the MOU, requires the signature of other INCOSE Directors. With reference to Figure 1:

- Any MOU with Standards Bodies & Government Agencies shall require the approval of the Director for Technical Operations
- Any MOU with a Chapter (for example, for legal incorporation into INCOSE, membership model and fees structure) shall require the approval of the appropriate Sector Director
- Any MOU with an Enterprise (for the purposes of Certification arrangements and training) shall require the approval of the Certification Program Manager
- Any MOU with an Academic Institution (for example, for research or education and training delivery) shall require the approval of the Director for Academic Matters



- Any MOU with a Professional Institution or Industry Association shall require the approval of the Director for Technical Operations and the Director for Outreach.

At National Chapter level, Alliances and MOUs with similar objectives are encouraged, for Standards Bodies / Government Agencies, Academic Institutions, and Professional Institutions / Industry Associations. However, no such MOU shall contradict the terms of any Alliance or MOU at International level. Chapters should implement a similar approval process to the above, at local level. Chapters should record and maintain their MOUs centrally, and notify the INCOSE Director for Outreach, and the central INCOSE Administrative Office of their MOUs.

Recording and Maintenance of Outreach Alliances

In principle, every MOU should be visible to all INCOSE members. Exceptions may be made, at the discretion of the Executive Committee, for example in cases of commercial sensitivity.

Signed copies of approved MOUs shall be converted to PDF format and stored centrally, currently on INCOSE Connect. MOUs exempted from public visibility shall be stored, together with editable source versions, in a central area visible only to the Board of Directors and their nominated delegates, e.g. Associate Directors or other Members in good standing.

SUPERSEDES: OUT-100 from October 31, 2015

APPROVED BY: INCOSE Board of Directors, Jacksonville FL USA – January 24, 2018

MAINTAINED BY: Director for Outreach