



## **OUT-100: Outreach Principles – 1 February 2021**

### **Purpose**

The purpose of the policy is to outline the scope of Outreach and the principles that guide the formation of alliances.

### **Applicability**

The policy applies to INCOSE members, Working Groups, Technical Operations, Services Operations, Chapters, Sectors and any other entity wishing to enter alliances with organizations that complement INCOSE knowledge.

### **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.

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.

### **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.

### **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 the means by which 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:
  - i. Mutual high-profile event participation with good promotional opportunities.
  - ii. Mutual access to the other organization's high-value products & resources.
  - iii. 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).
  - iv. Joint training opportunities, such as specially-hosted events, short courses, and training programs.
  - v. Joint membership model.

More detailed guidelines for the formation and approval of alliances, MOUs, and MOAs can be found in Policy OUT-101.

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.

### **Authority to Implement Alliances**

Any formal MOU or MOA documenting an alliance on behalf of INCOSE at the international level shall be approved by the INCOSE BoD and authorized by the INCOSE President 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.

### **Recording and Maintenance of Outreach Alliances**

In principle, every MOU and MOA should be visible to all INCOSE members. Exceptions may be made at the discretion of the INCOSE Executive Committee in cases of commercial or other sensitivities.

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

### **Responsible Position**

The Director of Outreach is responsible for this policy.

### **Related Policies**

ACD-101 Academic Council

CAB-100 Corporate Advisory Board

CHP-100 Chapters

OUT-101 Guidelines for the Formation and Approval of Alliances, MOUs, and MOAs

**SUPERSEDES: OUT-100 dated 24 January 2018**

**APPROVED BY: INCOSE Board of Directors, Virtual, 1 February 2021**

**POLICY OWNER (RACI Responsible R): Director of Outreach**

**MAINTAINED BY (RACI Accountable A): President Elect**