Your Guide to Delivering SEI Services
The SEI Partner Network is a premier group of organizations that deliver time-tested, proven services developed by the Carnegie Mellon University Software Engineering Institute (SEI). Whether you are already a Partner or are interested in becoming one, this guide can help you understand what service licenses are available, the benefits of being a Partner, and how to carry out your work as an SEI Partner.

Proven Solutions on the Cutting Edge of Technology
The SEI is a world-renowned center for excellence in researching and improving all stages of the software lifecycle, from development to deployment to incident response. Operated by Carnegie Mellon University, the SEI is on the cutting edge of technology. We research software and cybersecurity problems of considerable complexity, create and test innovative technologies, and transition maturing solutions to widespread use. Using tools, technologies, and practices developed or matured by the SEI, organizations and government agencies can meet mission goals through improvements that include

- more efficient and agile development of software-reliant capabilities
- improved software project cost estimation
- reduced risk due to software vulnerabilities
- more resilient cyber systems and networks
- reduced sustainment costs
- a workforce skilled in the acquisition of complex, secure software systems
Contents

About This Guide 1
About the SEI Partner Network 2
Ways to Partner 3
Becoming a Partner 4
Working as a Partner 6
Partner Resources and Benefits 8
Glossary 12
Frequently Asked Questions 14
About This Guide

This guide describes the global SEI Partner Network program and the benefits, terms, and tools related to SEI Partner participation in the network. It explains how to become an SEI Partner and the services that SEI Partners can offer. This guide is a supplement to the SEI Partner Universal License Agreement, which is a legal contract.

Who Should Read This Guide?
This Partner Guide is for organizations applying to become a Partner and those already participating in the SEI Partner Network.

If you (on behalf of yourself or your employer) represent yourself as an SEI Partner or if you request, access, or use any benefits under the SEI Partner Network Program, you are agreeing to the terms and definitions of this Partner Guide under the SEI’s current policies.

How Can I Learn About Changes to This Guide?
This guide will be updated periodically as the SEI Partner Network program evolves. Please check back frequently to get the latest version.

The SEI may post additional fact sheets and program information at the Partner Resource Center (partner-resources.sei.cmu.edu) that may supplement or modify this guide. Log in to the Partner Resource Center often for the latest information about your Partner services.
About the SEI Partner Network

Improving Software Engineering, Worldwide
For over three decades, the SEI has been helping government and industry organizations to acquire, develop, operate, and sustain software systems that are innovative, affordable, enduring, and trustworthy. We serve the nation as a federally funded research and development center (FFRDC) sponsored by the U.S. Department of Defense (DoD) and are based at Carnegie Mellon University, a global research university annually rated among the best for its programs in computer science and engineering. As an FFRDC, a large part of our mission is transition—taking what we've learned and broadly disseminating that knowledge in an effort to improve the state of software engineering around the world.

What Is a Partner?
An SEI Partner is an organization that has signed a license agreement with the SEI to license one or more of the SEI's standard licensing products. The SEI licenses Partners to teach courses or provide official services. Partners sponsor certified individuals—instructors, navigators, coaches, appraisers, and team leaders—to carry out their SEI work.

The SEI created the Partner Network in 1994 when the demand for services became so great that it could no longer effectively meet the needs of the community with its own staff. To help address those needs, we called on experts in the field—organizations like yours. We trained these organizations to deliver our services, and we established strict standards to ensure that each Partner could offer the same high quality as the SEI.

SEI Partners: A Global Reach
The SEI Partner Network is comprised of organizations around the world that are tested, monitored, and licensed by the SEI to provide official courses and services. Our Partners are essential to our mission because they provide the vast, global reach needed to help engineers, managers, and business people implement proven technologies. SEI Partners are the only source for authentic SEI services outside of the SEI.

Quality Your Customers Can Trust
The SEI takes quality seriously and builds close relationships with our Partners and their certified individuals. Your customers can be sure they're getting the same quality available from the SEI itself because we require authorized and certified individuals to fulfill qualification steps, pass examinations, and perform ongoing maintenance activities to stay current in the practice of their authorizations and certifications.
Ways to Partner

The SEI offers two primary Partner arrangements designed to fit the way you plan to deliver or utilize the SEI services: commercial use and internal use.

Commercial Use
Commercial Use Partners can teach courses, provide services, or both, outside their organizations. Under this arrangement, SEI Partners can deliver SEI products and services to customers and clients.

Internal Use
Internal Use Partners can teach courses, provide services, or both, inside their organizations, allowing Partners to build their own internal capability for the adoption of SEI products and services. Internal licenses are granted in all Commercial Use licenses.

In addition to these arrangements, selected specializations offer SEI Partners the opportunity to engage with the SEI in three specialized arrangements: academic, government, and strategic.

Academic Partner
The SEI encourages academic organizations to become SEI Partners. The academic license program is designed to help train and educate students in the SEI's products and services. Professors can use SEI materials to build a curriculum that will give students a competitive advantage when they enter the workforce. The SEI may collaborate with Academic Partners on special initiatives, and Academic Partners enjoy the same benefits as our Commercial Use Partners.

Government Partner
The SEI frequently collaborates with U.S. Government Partners on special initiatives, and Government Partners enjoy the same benefits as our Commercial Use Partners.

Strategic Partner
In addition to the services provided by other SEI Partner Network organizations, Strategic Partners are able to teach SEI advanced courses, conduct qualifying events such as observations and certification examinations for individuals in credential tracks, and conduct quality assurance and standardization activities in the region for SEI technologies they represent. Strategic Partners represent a select group of organizations that, through a broadened relationship with the SEI, are able to amplify the SEI's technology impact in certain strategic geographic regions or countries. The SEI invites participation from identified SEI Partner Network Partners and fosters a relationship to create joint solutions and drive customer adoption of SEI technologies.
Becoming a Partner

Joining the Partner Network
Applying to join the SEI Partner Network is easy. Simply complete the online application form for review by the SEI, agree to the Code of Professional Conduct (CoPC), and submit your application fee to the SEI.

Getting Started
An SEI Partner is an organization that has signed a license agreement with the SEI. If your application is approved, you will receive an SEI Partner license agreement that grants you permission to use and provide SEI products and services. Review your license agreement with your sponsored individuals to ensure they understand the terms under which they can deliver services for you.

Enrolling in a Specialization
SEI Specializations are designed to recognize Partners that have proven expertise in a particular technology or business area.

Specializations provide a consistent method by which the SEI, SEI Partners, and their clients or customers are able to identify experts in specific areas of business. Participation in one or more specializations provides access to tools and benefits that may not otherwise be available to Partners and assists in promoting Partner services. Licensing requirements for each specialization can be found on the SEI Partner Resource Center.

SEI Partners enroll in a specialization to receive a license to offer a particular SEI technology. Partners then sponsor individuals to earn credentials and deliver these products and services. The SEI licenses Partners in four specializations.

CERT Information Security
As an SEI Partner for CERT information security courses, your organization sponsors SEI-Authorized CERT Instructors for one or more of six core training classes designed to meet the needs of several audiences including IT management, systems and network administrators, and organizations looking to build an internal incident response capability:

- Advanced Topics in Incident Handling
- Assessing information Security Risk Using the OCTAVE Approach
- Creating a Computer Security for Incident Response Team
- Fundamentals of Incident Handling
- Managing Computer Security Incident Response Teams
- Secure Coding in C and C++
CERT Resilience Management Model (RMM)
As an SEI Partner for the CERT-RMM, your organization sponsors certified CERT-RMM Lead Appraisers to perform CERT-RMM appraisals.

Insider Threat
Organizations that license Insider Threat can perform CERT Insider Threat Vulnerability Assessments by sponsoring SEI-Authorized Insider Threat Vulnerability Assessors, and they can perform CERT Insider Threat Program Evaluations by sponsoring SEI-Authorized Insider Threat Program Evaluators.

Software Engineering Measurement and Analysis (SEMA)
As an SEI Partner for SEMA, your organization sponsors SEI-Certified Instructors for any or all of the three core training courses:

- Designing Products and Processes Using Six Sigma Instructor
- Implementing Goal-Driven Measurement Instructor
- Improving Process Performance Using Six Sigma Instructor
Working as a Partner

Sponsorship
An SEI Partner is an organization that is licensed to deliver products and services based on Carnegie Mellon University’s copyrighted materials developed at the SEI. SEI Partners sponsor individuals to become certified to deliver SEI products and services.

Sponsoring Individuals for the Certification Process
SEI Partners must ensure that individuals delivering SEI products and services earn appropriate credentials through the SEI to deliver such products and services. The SEI grants certification and authorization to individuals who demonstrate proficiency in a specified set of skills, abilities, and knowledge in a particular knowledge area. Details for the credential process for your specialization can be found on the SEI website under Credentials. For more information about any specialization, please contact partner-info@sei.cmu.edu.

SEI Partners begin the sponsorship of individual candidates by having the business point of contact submit the candidate sponsorship form. After an individual has completed his or her certification, that individual can be sponsored by one (primary) and more than one (secondary) Partner. Notification of such secondary sponsorship is accomplished through the secure Partner Directory website by the Partner business point of contact.

Change of Sponsorship
Any changes (e.g., addition or deletion) of a sponsored individual are made via the secure Partner Directory website by the Partner business point of contact. It is important that the business point of contact remove an individual from the Partner organization sponsorship as soon as it is known that the individual will no longer be providing licensed services for that organization.

Accessing Materials
Electronic access to the materials required for the delivery of SEI products and services, specific to your license and specialization, is provided through the SEI’s Partner Resource Center. There, you will find a set of companion documents or checklists that provide requirements for and limitations on the use of those materials.

Additionally, we may license selected courses through an e-learning platform. Any e-learning courses licensed by the SEI will be identified in the license. Requirements for delivery may be found at the SEI Partner Resource Center.
**Using Materials**

Use of SEI materials is allowed only by (i) SEI-Authorized or SEI-Certified individuals who are using the materials to deliver the specific course for which the materials are provided and working on behalf of an SEI Partner and (ii) certification candidates who are sponsored by the SEI Partner and who are using the materials in support of completing the certification process.

SEI-Authorized and SEI-Certified individuals are not permitted to use SEI materials for any other purpose, including but not limited to the delivery of courses or services independently or on behalf of organizations that are not licensed by the SEI to deliver the course or service for which the materials are provided. If an SEI Partner discontinues its relationship with an SEI-Authorized or Certified individual, the Partner shall use commercially reasonable efforts to retrieve all SEI materials in the individual's possession.

**Quality Assurance**

The SEI provides a robust set of quality assurance activities for the products and services delivered by SEI Partners. These activities are described in more detail on the certification pages and at the Partner Resource Center. Additionally, the SEI may conduct surveys of SEI Partner customers who have participated in the Partner's delivery of SEI products and services.

**Audit Procedures**

The SEI reserves the right to audit delivery of services or financial documentation in accordance with the Record Keeping section of the Partner License Agreement.

**Customer Satisfaction Survey**

The SEI reserves the right to conduct follow-up surveys with Service Participants who have received official SEI products and services from an SEI Partner. Service Participants include both Partner organizations and authorized or certified individuals.
Partner Resources and Benefits

By becoming experts in proven SEI tools and methods, SEI Partners benefit from the stability and consistency that SEI approaches provide—and an image of confidence that customers can trust. SEI Partners have access to products, materials, marketing tools, training, discounts, technical support, tools, and pilot opportunities. Each Partner works with SEI staff members who tailor a Partner arrangement with responsibilities and benefits suitable for the Partner organization. This section describes Partner benefits in more detail.

Access to benefits varies by specialization. Certain benefits have additional requirements, as detailed on the SEI Partner Resource Center.

Advance Product Information
Partners receive critical information about SEI products before they are released to the general public. This can help Partners learn about products and identify sales opportunities for new product releases. This information is considered proprietary to the SEI, and agreement to additional terms may be required.

Product Pilot Program
The SEI Product Pilot Program provides an opportunity for Partners to engage with the SEI during the product development cycle for selected products. Partners provide technical feedback and evaluation of selected SEI products and services prior to release. By offering pre-release input, Partners help the SEI develop customer-driven solutions. Participation helps shape the direction of development for future SEI products and services, thereby providing customers with the products and services they need.

Collaboration Opportunities
SEI Partners are given priority preference to collaborate with the SEI on research and development opportunities.

Customer Relations Support
Phone and email support for Partner-related as well as specialization-related issues and questions ensures that SEI Partners receive a response within one business day. Support is available by phone at 1-888-201-4479 or via email at partner-info@sei.cmu.edu.
Incentive Programs and Discounts
We offer rebate and other incentive programs to help motivate and reward eligible Partners for certain performance activities. This benefit includes periodic “Partner only” prices for training, exams, and conferences. For more information on incentive program availability, features, and terms, visit the SEI Partner Resource Center.

Partner Resource Center
Partners receive access to the SEI Partner Resource Center, the web-based SEI Partner portal that houses all materials that SEI Partners require to deliver SEI products and services. In addition, the Partner Resource Center provides Partners with access to the range of materials and tools offered through their SEI Partner Program participation, such as product information, marketing materials, training, and other Partner benefits based on the organization's package in the Partner program. To access the Partner Resource Center, visit partner-resources.sei.cmu.edu.

Intellectual Property
All materials (course slides, evaluation forms, handouts, etc.) that SEI Partners require for the delivery of SEI products and services are available at the Partner Resource Center. The SEI provides SEI Partners with updates, revisions, and new versions—including translations of the materials—via the Partner Resource Center as they become available. Frequency and availability of updates may vary across specializations and license types.

Accessing and Creating Translations
SEI Partners receive access to all SEI-sanctioned translations of SEI-licensed materials that become available.

If the SEI has not released an SEI-sanctioned translation, SEI Partners are permitted to create unofficial translations of the licensed materials by

1. providing advanced written notice to partner-info@sei.cmu.edu
2. including the required SEI disclaimers and notices on the unofficial translation
3. providing an electronic copy of the translated materials to partner-info@sei.cmu.edu for posting on the Partner Resource Center
4. providing copies of the English-language materials to all clients, customers, or students where the unofficial translation is being used
Ethics and Compliance Program
The SEI Partner Network Ethics and Compliance program upholds the standard of excellence by holding high standards for our work with Partners and sponsored individuals. Two tools drive the work of this program:

1. The Code of Professional Conduct (CoPC) for SEI Services defines appropriate standards of professional conduct for SEI Partners and sponsored individuals. All organizations and individuals who provide our products or services agree to uphold the standards outlined in the CoPC by acting with honesty, integrity, and fairness and without actual or apparent conflict of interest.

2. The SEI Partner Ethics and Compliance email address is for reporting unethical, illegal, or quality-compromising behavior related to SEI Partner delivery of SEI services. Your concerns about ethical behavior and quality are important to us, and we encourage you to share these concerns with us. The Ethics and Compliance manager carefully reviews and investigates all reports of violations.

Partner Events
The SEI sponsors various events—such as Partner conferences, webinars, workshops, briefings, product launches, and focus groups—on a regional or specialization basis to which eligible Partners may be invited. Generally there is no fee to attend a SEI Partner event. However, certain events may require a registration fee. In addition, Partner-funded co-sponsorship may be arranged separately by agreement with the SEI.

Partner Directory
SEI Partners can list their Partner services in the SEI's web-based Partner Directory; the Partner Directory helps your potential customers find out what services you provide and check your credentials. You can maintain your own Partner information, upload your organization’s logo, and list contact information to help customers get in touch with you.

The directory also identifies Partners with specific areas of expertise. Partners who specialize in a certain technology are highlighted to help customers quickly identify Partners that specialize in a particular field.

Partner Recognition
The SEI recognizes Partners who have participated in the SEI Partner Network for 10 or more years. Representatives from Partner organizations celebrating 10, 15, and 20 years are honored among their peers at selected SEI events.
Marketing Kit
Partners receive access to materials to help you understand the market outlook for your SEI services and to market your SEI services to your customers. Depending on your specialization, you will receive

• press release templates for announcing your relationship with the SEI and the addition of any new SEI technologies to your Partner portfolio
• templates for one-page flyers that you can customize with your organization information (these flyers can be distributed at conferences and other events where you would like to advertise your services to potential customers)
• product brochures describing the SEI technologies that your organization is licensed to offer

Partner Identity (Logo)
As part of the Partner marketing kit, SEI Partners receive files of the SEI Partner identity, which contains logos you can use on your organization's website, printed materials, and other publications. You must follow the SEI Partner Identity Guidelines when using the logo. Logos and guidelines are available for download from the Marketing Kit section of the Partner Resource Center.

Ongoing Communication About SEI News and Products
Partners receive ongoing communication about SEI news, products, and services via the Partner Resource Center, newsletters, email, conferences, and seminars.

Partner Quick-Start Guide
The Partner Quick-Start Guide contains at-a-glance information to help you manage your participation in the SEI Partner Network. For example, it explains how to access the Partner Resource Center, maintain your directory listing, and submit your logo.
Glossary

Academic Institution
An academic institution must be organized and operated for educational purposes—such as a public or private school, college, or university—and be accredited by an appropriate government board of education or accrediting organization.

Annual Support Fee
A Partner organization pays an annual support fee for each credentialed individual. If an organization is the primary sponsor of a credentialed individual, then the organization is responsible for the fees owed for the process of earning and maintaining the credential for that individual. Fees vary per authorization/certification and per specialization.

Business Point of Contact
The individual responsible at the SEI Partner organization for all correspondence with the SEI regarding SEI Partner Network activities, including invoicing, confirming and managing sponsorships of credentialed individuals, and managing the SEI Partner profile on the SEI Partner Directory.

Credentialed Individual
A person who is trained, has completed the necessary SEI qualification process, and is sanctioned by the SEI to perform or deliver licensed SEI services or courses; an SEI-Authorized Individual or an SEI-Certified Individual.

Government Purpose License Rights (GPLR)
Provides the U.S. government with the right to use SEI data for governmental purposes.

License Fees
Annual fee paid by the Partner organization for each licensed product or course for which the Partner organization has sponsored an SEI-Credentialed Individual.

Organizational Fee
Annual fee assessed for each Partner organization.

Per Seat Fee
Fee paid by the Partner organization for each student trained in an SEI specialization.

SEI Partner
An organization that has signed a Universal License Agreement with the SEI to license one of the SEI’s standard licensing products.
SEI Partner Network
The SEI Partner Network refers to the aggregate group of all SEI Partners and is comprised of organizations that are tested, monitored, and licensed by the SEI to provide services and courses.

Service Participant
An individual or an organization that participates in a service performed by the Agreement Partner under the Universal License Agreement.

Specializations
Technologies or business areas specified in the Partner Guide.

Sponsorship
SEI Partners sponsor individuals to achieve credentials to deliver the SEI products and services for which the Partner is licensed.

Strategic Partner
In addition to the services provided by other SEI Partner Network organizations, Strategic Partners are able to teach SEI advanced courses, conduct qualifying events such as observations and certification examinations for individuals in SEI qualification tracks, and conduct quality assurance and standardization activities in the region for the SEI technologies they represent.

Universal License Agreement
A legal contract between Carnegie Mellon University and a Partner organization that provides the Partner with rights, benefits, and obligations for the use of specific SEI materials.
Frequently Asked Questions

What kind of organization makes a good SEI Partner?
An SEI Partner organization has

• the ability to provide the highest quality training and consulting services and include quality assurance measures for those services
• demonstrated ability to transition technology practices in commercial settings, including competence in organizational change management
• the financial ability to sponsor candidates through the authorization or certification process, to effectively market SEI services to their target market, and to make other investments that may be necessary to achieve their business plans
• an interest in providing or a plan to provide SEI services in parts of the world that may currently be underserved and in languages that may currently be underrepresented in our current pool of SEI Partners

What does it cost to be an SEI Partner?
The SEI Partner Application fee is $500 USD. The annual Partner fee is $1,000 USD. In addition, each SEI Specialization has annual fees per person authorized or certified to offer SEI services in that specialization, and each SEI course has seat fees per person. Contact partner-info@sei.cmu.edu for more detail about fees in your specialization of interest.

How do I register my organization as an SEI Partner?
Complete and submit an SEI Partner Application. To fill out and submit an application, you will first need to create a user account.

If the SEI accepts your Partner Application, we will ask your organization to sign a license agreement with the Carnegie Mellon University Software Engineering Institute in order to receive access to the licensed materials, sponsor individuals to become authorized or certified in SEI specializations, and receive the benefits of participation in the SEI Partner Network.

What happens after my organization becomes an SEI Partner?
After the application and license agreement are fully signed, you will gain access to the SEI Partner Resource Center and have your organization listed in the SEI Partner Directory. The Partner Resource Center provides access to many of the SEI Partner benefits, such as course materials and other intellectual property, identity guidelines and logos, and the marketing kit. The SEI Partner Directory helps your potential customers find out what services you provide, check your credentials, and get in touch with you.

Where can my SEI Partner organization offer SEI services?
The Universal License Agreement between the Partner organization and the SEI will specify any territory restrictions. Send questions about territory restrictions to partner-info@sei.cmu.edu.
What logos can an SEI Partner organization use on its website or in email signatures?
As part of the Partner marketing kit, SEI Partners receive files of the SEI Partner identity, which contain logos you can use on your organization’s website and in email signatures. You must follow the SEI Partner Identity Guidelines when using the logos. Logos and guidelines are available for download from the Marketing Kit section of the Partner Resource Center.

In addition, you may submit your organization’s logo for inclusion in the web-based SEI Partner Directory.

Is marketing material available for my organization’s SEI-licensed specialization?
The SEI has a variety of marketing material available in the Partner Resource Center. Materials includes brochures about the benefits of SEI products and services and short white papers that provide more detail than the brochures.

How does an SEI Partner register a new SEI-Certified or -Authorized individual in the SEI Partner Directory?
The Partner’s business point of contact may add new SEI-Certified or -Authorized individuals to the SEI Partner Directory at olpd.sei.cmu.edu.
About the SEI

The Software Engineering Institute is a federally funded research and development center (FFRDC) that works with defense and government organizations, industry, and academia to advance the state of the art in software engineering and cybersecurity to benefit the public interest. Part of Carnegie Mellon University, the SEI is a national resource in pioneering emerging technologies, cybersecurity, software acquisition, and software lifecycle assurance.

Contact Us

CARNEGIE MELLON UNIVERSITY
SOFTWARE ENGINEERING INSTITUTE
4500 FIFTH AVENUE
PITTSBURGH, PA 15213-2612
sei.cmu.edu
412.268.5800 | 888.201.4479
info@sei.cmu.edu