

The background is a solid red color. It features several overlapping circles of varying sizes. Some circles are solid white lines, while others are dashed white lines. There are also several white plus signs (+) scattered across the design. The text is centered in the upper half of the page.

Guide to the SEI Partner Network

Spring 2022

At Carnegie Mellon University's Software Engineering Institute (SEI), we shape the future of software for a better world. We've been working with the U.S. Department of Defense (DoD), government agencies, and private industry since 1984 to help them meet their mission goals and gain strategic advantage. We research complex software engineering, cybersecurity, and artificial intelligence (AI) engineering problems; create and test innovative technologies; and move innovations from concept to practice, closing the gap between research and use.

An SEI Partner helps organizations grow by giving them the SEI tools and techniques they need to improve their security. As an SEI Partner, your organization is a member of an exclusive group: the SEI Partner Network. This network delivers time-tested, proven SEI products and services and is the only source of authentic SEI products and services besides the SEI itself.

Contents

What Is an SEI Partner?	1
Partner Benefits	2
Connect Your Services to Our Reputation	2
Be a Part of a Network of Partners	2
Get Help with Marketing	3
Explore Other Benefits	3
Partnering Options	4
Scope Options	4
Specialization Partners	4
Partner Responsibilities	6
Sponsor SEI-Authorized Individuals (SAIs)	6
Coordinate With Us	6
Ensure SEI Materials Are Used Responsibly	7
Ensure High-Quality Products and Services	7
Ensure Client Satisfaction	7
How to Become an SEI Partner	8
1. Apply	8
2. Agree	8
3. Access	8

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What Is an SEI Partner?

When Software Engineering Institute (SEI) training and services become standardized and relevant technologies are more widely adopted, we at the SEI authorize licensees to share this knowledge with the community. We refer to these licensed organizations as *SEI Partners*; an SEI Partner gives their clients the tools and techniques they need to improve and meet their business goals. We test and monitor each Partner, and we have Partners all over the world.

As an SEI Partner, your organization sponsors at least one SEI-authorized individual (SAI) who can deliver select SEI products and services. An SAI (e.g., instructor, appraiser, evaluator) is your employee or contractor; that SAI has special skills that they acquired during the SEI authorization process.

When an SAI completes the SEI authorization process, the SEI sanctions them to perform or deliver one or more licensed SEI products and services. To maintain SEI authorization, the SAI must attend training, pass examinations, and stay current through continuing education.

The relationship between Partners and SAIs is symbiotic and crucial to ensuring that SEI Partners provide high-quality delivery of our products and services. Without your sponsorship of at least one SAI, your organization cannot operate as a Partner because SAIs are the only trained professionals (besides SEI staff) permitted to deliver SEI products and services.

Partner Benefits

As an SEI Partner, you can provide SEI products and services that improve security internally and for your customers. These products and services help those who receive them do the following:

- understand and prevent insider threats
- reduce risks from software vulnerabilities
- safeguard critical assets
- increase network and system resilience

We describe these and other benefits in more detail in this section.

Connect Your Services to Our Reputation

The SEI, its CERT Division, and Carnegie Mellon University are pioneers and leaders in software engineering and cybersecurity. As a Partner, you share in this work and influence the future direction of our research. You benefit from the SEI's stability and consistency, and you share in the confidence that clients have in our products and services. As part of our license agreement with you, we work with you to tailor a Partner relationship that helps you offer the SEI products and services your clients need.

Be a Part of a Network of Partners

Become part of the SEI Partner Network. When you become a Partner, you automatically become part of the network. We created this network to help us ensure that high-quality, reliable experts in the field meet the needs of the global community. Those experts—SAs—are provided by organizations like yours. We train your SAs to deliver our products and services, and we enforce strict standards that ensure high-quality delivery. As a Partner, you reach the users (e.g., engineers, managers, and executives) who implement our proven products and services globally. You also might demonstrate technology-transition practices, help clients achieve their business goals, and provide SEI products and services worldwide.

Gain access to the SEI Partner Resource Center. The SEI Partner Resource Center is a web-based portal accessible only by SEI Partners. It contains the SEI products and services (e.g., course slides, evaluation forms, handouts) your organization is licensed to deliver. The materials available to you in the center are tailored to your specific license and specialization(s). Use the center to access updates, revisions, and new versions—including translations of the materials—as they become available.

Be Recognized for Your Years of Service. We recognize 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.

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Get Help with Marketing

Receive a custom marketing kit. This customized kit contains materials that help promote SEI products and services to your clients. Depending on the Partner options you select, you receive one or more of the following:

- files that contain your SEI Partner identity, including a seal you can use on your organization's website and printed materials
- press release templates for announcing your relationship with the SEI and alerting clients when you add new SEI technologies to your Partner portfolio
- customizable templates for information sheets that explain the benefits of SEI products and services

Be automatically listed in the SEI Partner Directory. This **directory** lists all SEI Partners, the SAls they sponsor, the products and services they offer, and their areas of expertise. The directory helps potential clients find your organization and check your credentials. You can maintain your own Partner information, upload your organization's logo, and include contact information.

Explore Other Benefits

Use translations of SEI materials. When SEI-sanctioned translations of SEI materials are available, the Partners licensed to deliver them can use them.

Create translations of SEI materials. If we do not offer an official SEI-sanctioned translation, SEI Partners can collaborate with us to create unofficial translations (e.g., Japanese, Spanish) of licensed materials by doing the following:

1. Provide advance written notice to partner-info@sei.cmu.edu.
2. Include the required SEI disclaimers and notices on the unofficial translation.
3. Provide an electronic copy of the translated materials to partner-info@sei.cmu.edu for posting on the Partner Resource Center.
4. Provide copies of the English-language materials to all clients or students where the unofficial translation is being used.

Partnering Options

We offer two different Partner scope options (i.e., *Commercial Use* and *Internal Use*) and two specialization options (i.e., *CERT Information Security* and *Insider Threat*). We explain each option in this section.

Scope Options

We offer two primary scope options for Partners: Commercial Use and Internal Use. Each is designed to fit the way your organization plans to deliver or use select SEI products and services.

Commercial Use Partners provide products and services to clients outside their organizations.

Internal Use Partners provide products and services inside their organizations only. This option allows you to build your own internal capability for adopting SEI products and services. (The SEI automatically grants Internal Use options to all Commercial Use Partners.)

Specialization Partners

We offer two specialization options: *CERT Information Security* and *Insider Threat*. We explain each option in this section. A Specialization Partner has access to the tools and benefits related to that specialization. Some Specialization Partners pay per-seat or use fees. (The per-seat fee only applies to courses offered by Partners with a CERT Information Security specialization. Partners with an Insider Threat specialization pay a use fee for each assessment or evaluation conducted.)

CERT Information Security Partner

An SEI Partner organization for CERT Information Security can work with SAIs to build an internal incident response capability or educate its workforce in skills and methods related to the security of information systems. Each CERT Information Security Partner sponsors one or more SAIs who can teach any of the following CERT information security core training classes. These classes, described below, are designed for information technology (IT) management, systems and network administration, and organizations building an incident response capability.¹

Advanced Topics in Incident Handling covers techniques for detecting and responding to current and emerging computer security threats and attacks.

Assessing Information Security Risk Using the OCTAVE Approach, an online course, teaches participants to perform information security risk assessments using the Operationally Critical Threat, Asset, and Vulnerability Evaluation (OCTAVE) Allegro method.

¹ For full course descriptions, see the Education and Outreach section of the SEI website (<https://www.sei.cmu.edu/education-outreach/index.cfm>).

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Creating a Computer Security Incident Response Team (CSIRT) provides a high-level overview of the key issues and decisions that organizations must address when they're establishing a CSIRT.

Foundations of Incident Management teaches participants about the functions of an incident management capability and how best to perform those functions.

Managing Computer Security Incident Response Teams describes the issues organizations face in operating an effective CSIRT.

Insider Threat Partner

As an SEI Partner for Insider Threat, your organization can license the CERT Insider Threat Vulnerability Assessment tool and sponsor SAIs to perform assessments and evaluations. Each Insider Threat Partner sponsors one or more SAIs who can deliver any of the following CERT insider threat services using SEI products. If you are a federal contractor, this partnership helps you implement an insider threat program to comply with Executive Order 13587, which is required by the NISPOM.

CERT Insider Threat Vulnerability Assessments (ITVAs) help organizations understand their insider threat risk and identify/manage associated risks. These assessments measure how prepared organizations are to prevent, detect, and respond to insider threats.

CERT Insider Threat Program Evaluations help organizations understand the effectiveness of their established insider threat programs.

Partner Responsibilities

As a member of the SEI Partner Network you are responsible for conducting the following activities.

Sponsor SEI-Authorized Individuals (SAIs)

As an SEI Partner, you must sponsor at least one SAI, a person who completes our authorization process, including attending training, passing examinations, and staying current through continuing education.² Besides SEI staff, SAIs (e.g., instructors, appraisers, and evaluators) are the only professionals who can deliver licensed SEI products and services directly to clients. Each SAI can be sponsored by only one *primary* Partner but multiple *secondary* Partners.

Coordinate With Us

As a Partner, you are responsible for coordinating with the SEI in the following ways:

1. Establish a business point of contact (POC) who corresponds with us about SEI Partner Network activities. Your POC is responsible for activities such as invoicing, confirming and managing sponsorships of SAIs, and managing your profile on the SEI Partner Directory.
2. Ensure that your POC submits your candidates' sponsorship forms to the SEI.
3. Pay an annual fee for each of your SAIs.
4. If you are the *primary* sponsor of an SAI, you must pay for that individual's authorization and the process the individual must follow to maintain their authorization.
5. If you are the *secondary* sponsor of an SAI, you must ensure that that they have earned the appropriate SEI authorizations.
6. Update the **Partner Directory** website when your sponsorship of SAIs changes.

² See the details of the authorization process for your specialization on the SEI website: <https://www.sei.cmu.edu/education-outreach/credentials/index.cfm?searchString=authorization#assets>.

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Ensure SEI Materials Are Used Responsibly

As a Partner, you have access to the SEI Partner Resource Center, which (1) provides materials required for delivering SEI products and services and (2) explains the requirements for and limitations on their use. Your access to these materials is tailored to your specific license and specialization(s). You are responsible for ensuring that your SAIs follow the rules outlined in the Partner Resource Center.

Ensure High-Quality Products and Services

We conduct robust quality assurance activities for the SEI products and services you deliver to your clients. We might review other aspects of your role as a Partner; for example, we might audit your delivery of Partner-related services. If we initiate an audit, we will contact you, and you must (1) comply with our quality assurance activities and (2) commit to implementing improvements that result from them.

Ensure Client Satisfaction

As part of our commitment to ensuring client satisfaction, we sometimes conduct follow-up surveys with those who received official SEI products and services. If we contact you, you are responsible for helping us conduct these surveys and implementing the improvements that result from them. We provide you with the results of these surveys to help you improve client satisfaction and quality.

How to Become an SEI Partner

For your organization to become an SEI Partner, fill out an application and agree to the terms, then access the SEI's materials according to your license.

1. Apply

Applying to join the SEI Partner Network is easy. Follow these steps:

1. Visit the **Partner Application Center** to create an SEI Partner Network user account.
2. Complete the **online application form**.
3. Follow the online instructions to submit your application fee.

2. Agree

We will notify you once we review and accept your application. After you receive notification, follow these steps:

1. Sign a Universal License Agreement that grants your organization legal permission to use and provide select SEI products and services.³
2. Submit an annual organization fee to the SEI.⁴
3. Review your Universal License Agreement with the SAls you are sponsoring to ensure they understand the licensing terms they must follow to deliver products and services for you.

3. Access

After signing the Universal License Agreement, your organization gains access to the **SEI Partner Resource Center** and is listed in the **SEI Partner Directory**. The Partner Resource Center contains the SEI products and services your organization is licensed to deliver. The SEI Partner Directory helps potential clients see the products and services you provide, check your credentials, and contact you.

3 A *Universal License Agreement* is 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. This agreement also specifies any territory restrictions.

4 The costs associated with becoming an SEI Partner include an SEI Partner Application fee (\$500 USD) and an Annual Partner fee (\$1,000 USD). In addition, each SEI Specialization has annual fees per person authorized to offer SEI services in that Specialization, and each SEI course has per-seat fees.

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This material is based upon work funded and supported by the Department of Defense under Contract No. FA8702-15-D-0002 with Carnegie Mellon University for the operation of the Software Engineering Institute, a federally funded research and development center.

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DM22-0087

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About Us

Always focused on the future, the Software Engineering Institute (SEI) advances software as a strategic advantage for national security. We lead research and direct transition of software engineering, cybersecurity, and artificial intelligence technologies at the intersection of academia, industry, and government. 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.

The SEI is the only FFRDC sponsored by the DoD that is also authorized to work with organizations outside of the DoD. Its cooperative relationships with the U.S. Government, the private sector, and academia enable the SEI to move innovations from concept to practice, closing the gap between research and use.

Learn more about our work at <https://www.sei.cmu.edu/about/>.

Contact Us

The SEI Customer Relations Support team handles Partner-related and specialization-related issues and questions; members of the team respond within one business day. If you have any questions, contact us.

SEI Customer Relations Support Team

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