



CMMI® Partner - CMMI Performance Solutions Ecosystem Intellectual Property Policy

Purpose

This policy outlines how CMMI Partner organizations and CMMI Certified Individuals can use the CMMI Performance Solutions ecosystem Intellectual Property (IP) in the normal course of CMMI-related business.

Scope and Applicability

- All CMMI Partners are held to the IP Terms as outlined in the Partnership Universal License Agreement (ULA) that is in place with each Partner Organization.
- This policy serves to provide specific guidance for the current CMMI Performance Solutions ecosystem. It does not apply to prior versions of CMMI products.
- This policy applies to all Partner Business Points of Contact (BPOCs), Partner-sponsored Certified Individuals, and employees or designees of the Partner organization.
- These requirements were first announced and made applicable in July 2018 and were initially published as a formal policy on 1 July 2019.

Background

When CMMI V2.0 was developed and launched in March 2018, it was the first version of the CMMI created without the support of United States government funding. As part of the shift of stewardship to ISACA, the model has moved to a paid licensed-access structure. As such, some of the model content and associated resources can be distributed, while other content cannot. This policy outlines the permitted and restricted use cases for CMMI Performance Solutions ecosystem content.

Partners using CMMI IP within the guidelines of this policy do not need to request permission to do so. For any special cases or commercial-use proposals, a formal request should be sent to permission@cmmiinstitute.com.

Policy Implementation Detail

Sharing CMMI Content

Individuals with licensed access to CMMI Performance Solutions ecosystem content are permitted to “share” content from the CMMI model down to the Practice Statement level. Sharing content refers to reproducing and distributing materials to be left behind.

Partner-sponsored Certified Individuals are permitted to share the following content in appraisal tracking tools, marketing presentations, and other materials that are commonly used in driving adoption and performing appraisals:

- Practice Area (PA) Name
- PA Intent
- PA Value
- Additional Required PA Information
- Practice Statements

The following levels of detail cannot be shared with unlicensed individuals:

- Informative Material, including Required Practice Information
- Explanatory Practice Information
- Context-specific Information

The only exception to these restrictions on sharing model content is the Estimating (EST) PA which may be shared with unlicensed individuals for the purpose of helping to explain the structure and use of CMMI. EST is the only PA that can be used in this way. Please refer to Appendix B for further information.

As part of a licensed course delivery, course materials, e.g., slides, exercises, worksheets, may be left behind and retained by students in the course. The CMMI V2.0 Adoption and Transition Guidance may also be shared. Other CMMI Performance Solutions ecosystem components, including but not limited to the *CMMI Appraisal Method Definition Document* (MDD) and MDD Toolkit, may not be shared in their entirety. The Appraisal Team Leader (ATL) is permitted to share the MDD Executive Summary Section and Quick Reference Appendix.

Tailoring Content from the CMMI Performance Solutions ecosystem

“Tailoring” content refers to repurposing, reformatting, or augmenting the IP for the purpose of facilitating adoption of CMMI in organizations, promoting student learning, or improving the ease of use of tools or materials for the Certified Individual.

Individuals with licensed access to CMMI Performance Solutions ecosystem content are permitted to tailor content, in accordance with applicable guidance from CMMI course materials, the MDD Toolkit, or CMMI Model (down to the Practice Statement level). Certified CMMI Instructors are permitted to make changes to course materials in accordance with the tailoring guidelines found in the Training Library, which is made available to Instructors via their credential dashboard.

Translating Content from the CMMI Performance Solutions ecosystem

Independent translation of CMMI Performance Solutions ecosystem content is **not** permitted, except in the context of:

- Certified CMMI Instructors informally translating course materials—in accordance with tailoring guidelines—for students who lack proficiency in the English language.
- Certified CMMI Lead Appraisers or Instructors who wish to translate the CMMI Model-at-a-Glance document which contains the CMMI practice statements. These individuals may translate those portions of the CMMI Model-At-A-Glance document that are not model content. CMMI copyright language must be included, and the document itself should clearly indicate that it has come from the CMMI Partner organization and is not an official ISACA translation.

ISACA maintains official translations of some languages for the CMMI Model and CMMI Associate Exam.

Displaying Content from the CMMI Performance Solutions ecosystem

Individuals with licensed access to CMMI Performance Solutions ecosystem content are permitted to temporarily display any content from the Performance Solutions ecosystem for the purpose of explanation and business development. “Displaying content” refers to showing or representing IP to an interested party while ensuring that it is not retained by the viewing party. An example could be displaying the details of a PA to a prospective customer for the purpose of explaining the business value of CMMI to their organization.

Commercial Use of Content from the CMMI Performance Solutions ecosystem

Beyond official CMMI appraisal and course delivery, any individual or organization that is interested in building or selling standalone products or services based on, or utilizing, CMMI IP e.g., appraisal toolkits, how-to-guides, derivative training courses, software tools, needs a dedicated license from CMMI to create and sell these products or services in the marketplace.

Appendices

The included tables provide a visual guide to the policy outlined above. They are not intended to be comprehensive.

Appendix A: How Can I Use CMMI IP?

Refer to the section above, Translating Content from CMMI Performance Solutions ecosystem, for additional clarification on translating content to share with others.

USAGE TYPES	DISPLAY: Customer site visit, informal presentation	TAILOR: Adjust, repurpose, create derivative work	TRANSLATE: Translating content to share with others	SHARE: Reproduce, leave-behind, conference presentation	COMMERCIAL USE: Sell, resell
Model (Practice Statements)	YES	YES	NO	YES	REQUIRES ADDITIONAL LICENSING
Model (Informative Material)	YES	NO	NO	NO	REQUIRES ADDITIONAL LICENSING
Course Materials	YES	YES	YES	ONLY FOR STUDENTS	REQUIRES ADDITIONAL LICENSING
MDD	YES	NO	NO	NO	REQUIRES ADDITIONAL LICENSING
MDD Toolkit	YES	YES	NO (except ATM Training)	NO	REQUIRES ADDITIONAL LICENSING
Marketing Materials	YES	YES	YES	YES	REQUIRES ADDITIONAL LICENSING

Appendix B: What CMMI Model Content Can Be Shared?

ALL MODEL PRACTICE AREAS
Permitted IP Usage based on the
level of detail in the content

✓	DISTRIBUTION PERMITTED 1) Model 2) Category 3) Capability Area 4) Practice Area 5) Practice Group 6) Practice Statement
✗	DISTRIBUTION NOT PERMITTED 7) Informative Material -Required Practice Information -Explanatory Practice Information -Context Specific Information

ESTIMATING PRACTICE AREA
Permitted IP Usage based on one
specified content area

✓	DISTRIBUTION PERMITTED 1) Model 2) Category 3) Capability Area 4) Practice Area 5) Practice Group 6) Practice Statement
	7) Informative Material -Required Practice Information -Explanatory Practice Information -Context Specific Information

Additional Resources

- Questions regarding this policy should be submitted via support.isaca.org.
- Published policies are available at cmmiinstitute.com on the policy page: <https://cmmiinstitute.com/partners/policies>

Revision History

Version Number	Date Published	Date Effective	Changes
V1.3	24 February 2023	1 July 2019	Updated to align to current CMMI branding
V1.2	9 November 2021	1 July 2019	Updated to ISACA branding; removed outdated references; minor grammar and readability edits
V1.1	30 September 2019	1 July 2019	Updated format & structure; minor editorial updates
V1.0	30 June 2019	1 July 2019	Initial release