
Scrum Alliance Strategic Plan 2012

Executive Summary

In 2012, the Scrum Alliance continues to face new opportunities and challenges. Many other certifying bodies are beginning to catch on to what we've known for some time — Scrum certification is valuable, in demand, and of growing importance to the software industry and beyond.

We will continue to emphasize the Agile value of continuous improvement. Becoming more Agile using Scrum is not a once-and-done proposition but a lifetime journey of education and improvement. Give this, we believe that strong certification programs are essential to a meaningful Scrum journey. It is our intent to offer well-defined, well-respected certified Scrum programs in the Agile community. Scrum Alliance focused on creating strong CSM and CSP examinations in 2011, and they went live in January 2012. We will maintain these exams through community involvement and communication with our testing partner, Castle Worldwide.

Building on the website improvements that were made in 2011, we will continue to focus on those improvements and offer new features that reflect our values, vision, and mission. The website is an integral part of our offering to provide up-to-date information regarding resources, courses, articles, and community-building opportunities.

Carol McEwan, our managing director, will continue working with the staff to implement the strategic plan throughout 2012. Carol has put together a dynamic team that is here to serve the Scrum Alliance community. Carol will also be reaching out to key thought leaders and media contacts to ensure that our vision and mission are clearly communicated.

Values, Vision, Mission

Values

Respect
Focus
Openness
Commitment
Courage

Vision

"Transforming the World of Work"

There are many possible ways to transform the world of work, and we believe the Scrum framework to be one of the best.

Mission

Our mission is to introduce Scrum as an effective solution to business problems. We serve the

community as the trusted source of knowledge for those who want to learn Scrum, those who want to improve their understanding of Scrum, and those who want to share their knowledge and experience with Scrum.

We will accomplish that mission through three (3) primary objectives:

1. Provide trusted resources
2. Provide valuable membership in the Scrum Alliance
3. Offer meaningful certification in the Scrum framework

How well we execute these three objectives will be the measure of our success.

Provide Trusted Resources

Many people who use Scrum on a day-to-day basis have only a vague awareness of the Scrum Alliance. Extending the reach of the Scrum Alliance and promoting awareness of the organization will be a key focus in 2012. Our efforts will be on branding the Scrum Alliance through several ongoing outreach activities, some listed below.

Sponsor Community-Strengthening Events

Global Gatherings

The Scrum Alliance will hold two full-scale Global Gatherings (with solicited speakers, workshops, and open-space elements) in 2012, providing opportunities for the broad Scrum community to come together for networking, collaboration, learning, and personal growth. These events can significantly strengthen the overall Scrum community and will serve to emphasize the Scrum Alliance's prominent leadership role.

Atlanta, May 7 - 9, 2012

Barcelona, October 1 - 3, 2012

Regional Gatherings

In the spirit of community and collaboration, the Scrum Alliance will partner with members of the Scrum community to sponsor four to six smaller events, similar to Gatherings, over the course of the year. These events will take place around the world and will engage local community members to handle most of the operational responsibilities, while the Scrum Alliance provides promotion, visibility, credibility, financial support, and other resources.

Scrum User Groups

The Scrum Alliance will be actively engaged in working with the existing user group community and will also focus on helping create new user groups around the world. Our Scrum user groups are representative of the many cultures and viewpoints that make up the Scrum community. The Scrum Alliance does help sponsor user group events, and the appropriate sponsorship form may be found on the website: http://www.scrumalliance.org/user_group_sponsorship_applications/new.

Increase Organizational Outreach

To reinforce its position within the software development world and explore opportunities to extend Scrum to other areas, the Scrum Alliance will:

- Reach out to organizations such as PMI, Microsoft, etc.
- Foster relationships with special interest groups

- Activate and support local user groups
- Promote Scrum beyond software/moving beyond the software industry
- Underwrite the cost of trainers in developing nations
- Provide membership access to a jobs board

Provide Valuable Membership

The Scrum Alliance has a membership base of over 140,000 and growing. We'd like to further expand the base over the year and offer even more benefits to the active members of our Scrum community.

Members who have completed a certification course receive an active online profile, access to discussion groups, discounts to Gatherings, access to all training courses offered by CSTs, a voice on the website in the form of submitting articles for review and commenting on existing articles, and the ability to download logos pertinent to their specific certifications.

Coaches' Corner

We will work with the coaching community to develop an online coaching service offered only to members. We envision regularly scheduled chat sessions whereby members can get coaching advice from our Certified Scrum Coaches (CSCs).

Coaches' Retreat

In December 2011, the Scrum Alliance sponsored a Scrum Coaches Retreat. It was considered to be a great success and was a great example of building a better Scrum Coaching Community. In order to build a bigger/better/stronger coaching community, Scrum Alliance will continue to sponsor like coaching retreats in 2012 to strengthen both the Scrum Coaching Community and the CSC program.

Website

It is our intent to offer solid educational content and provide the thought leadership required to attract and engage new visitors and members to the Scrum Alliance through world-class offerings, making the site the first place to go to for your Scrum/Agile needs. We will continue to develop our website, offering additional resources and well-researched papers to our visitors. The site is being upgraded to offer a more user-friendly experience. This work will continue throughout 2012.

Offer Meaningful Certification

Scrum Alliance has a unique brand in its certification programs and will continue to offer CSM and CSPO courses. At the same time, we want to emphasize the benefits of a career path in Scrum rather than focus solely on entry-level certifications.

Scrum Alliance is the trusted place to go for professional resources, continuing education, and a community of like-minded individuals.

We will implement the following in 2012:

- Published learning objectives for CSM and CSPO courses derived from the CSP ScrumBOK, an essential reading list
- More challenging exams for CSM and CSPO based on the published learning objectives (both should be difficult to pass if you haven't taken a course)
- Requirement that candidates for CSM, CSPO, and CSP certifications must pass an exam to

- receive their credentials
- Requirement for maintaining certification by obtaining Professional Development Units (PDUs)

CSM, CSPO, and other introductory courses are just a first step in learning and practicing Scrum. Becoming Agile and growing in Scrum is a continuous journey.

The Scrum Alliance website will engage people on this journey, offering opportunities to display and track progress in continuing education, volunteer activities, community involvement, and more. Everything should lead to CSP.

CST Application and Renewal Processes

A new CST application process was implemented in 2011. This process has helped us identify several shortcomings, including its ability to scale, and our plan is to reassess and identify a more sustainable process in 2012.

Certifications

Certifications currently offered through the Scrum Alliance:

Certified Scrum Trainer (CST)

As an ambassador of Scrum, a CST will have a solid understanding of the Scrum framework, a deep understanding of the principles and values that are the foundations of Scrum, and clarity on what belongs to Scrum versus what is an extension or complement. A CST will also have extensive experience in implementing and/or coaching Scrum within organizations, be active in the wider Scrum community, and have training experience beyond Scrum.

Certified Scrum Master (CSM)

The CSM certificate is granted to those who have become familiar with Scrum Basics by taking a CSM course from a Certified Scrum Trainer (CST) and taking and passing Scrum Alliance's online exam.

Certified Scrum Product Owner (CSPO)

The CSPO certificate is granted to those who have taken a CSPO course from a Certified Scrum Trainer. Later in 2012, the new CSPO will be required to take and pass an online exam.

Certified Scrum Developer (CSD)

At least five days of formal training are required to earn a CSD credential. CSD applicants must also demonstrate an understanding of Agile engineering practices by taking and passing a five-day CSD assessment program. At least three of the five days must consist of technical CSD training, and at least one of the five days must be dedicated to the study of Scrum through a CSD-track Intro to Scrum course or CSM/CSPO course.

Certified Scrum Professional (CSP)

Active CSMs, CSPOs, and CSDs may apply to become Certified Scrum Professionals. Applicants must attest that they have at least one year (2,000 hours) of actual experience using Scrum in their work; demonstrate that they know how to apply Scrum concepts, practices, and principles by taking and passing an online proctored exam; and accept the CSP License Agreement. Potential employers can be assured that a CSP has taken the initiative to go beyond a foundation-level understanding to achieve a

depth of knowledge and experience in the Scrum process.

Certified Scrum Coach

Certified Scrum Coaches (CSCs) are experts in Scrum, both in theory and in practice. They have an in-depth understanding of the practices and principles of Scrum and have real experience on actual Scrum projects. As such, they play a vital role within the Scrum Alliance, bringing Scrum out of the classroom and into the world of work.

Overview of the Scrum Alliance Business Model

The Scrum Alliance is a not-for-profit professional membership organization created to share the Scrum framework with the world. Our mission is to provide a community for those who seek an effective solution to business problems and to serve as the source of Scrum knowledge for those who want to learn Scrum, those who want to improve their understanding of Scrum, and those who want to share their education in and experience with Scrum.

Revenue

Scrum's revenue is derived from three primary sources:

Certification Fees: Annual fees are charged to instructors who teach the Scrum framework. The typical annual fee is \$7,500 per instructor, and the majority of fees are collected in advance. For accounting purposes, these fees are recognized as revenue over the term of the certification period.

Class Revenue: The Scrum Alliance earns a portion of the fees that Scrum-certified instructors charge their classroom participants. The fees are collected and recognized as revenue as the classes are conducted. This is the Scrum Alliance's largest source of revenue.

Global Gathering Revenue: The Scrum Alliance collects fees from participants in and sponsors of the organization's various Global Gathering events held at sites around the world. The Global Gatherings provide a forum to support Scrum user groups and promote interactive learning.

Depending on the location of a particular gathering, revenues may or may not cover direct costs of the event, although the organization attempts to minimize the net excess of costs over revenue. In 2011, for example, the Scrum Alliance budgeted \$600,000 in gathering revenues and \$705,000 in direct gathering expenses.

Interest and Investments: In addition to the primary sources of revenue, Scrum earns interest and dividends on its cash and investments. Because of the low interest rate environment, investment income has been relatively insignificant in recent years.

Expenses

The significant components of Scrum's expense structure:

Staff Compensation: Scrum has historically retained a staff of contract professionals to oversee the operational and administrative activities of the organization. Staff positions, which change from time to time, have included a managing director as well as positions in marketing, membership, certifications,

gatherings/events, user group support, accounting, and administration. Historically, staff compensation has represented the largest of the organization's expenses.

Membership Support and Development: The organization incurs costs to maintain and enhance user materials, including information provided through its website.

Certification and User Group Expenses: Sponsorships and speakers are provided to user groups around the world in support of the Scrum methodology.

Program Development Costs: The Scrum Alliance continually strives to provide the most up-to-date programs reflecting the issues our members are currently facing. Materials and tools are subject to ongoing development to meet the needs of users.

Gathering Expenses: These are expenses directly associated with the gathering events and typically include costs of the facility, speakers, equipment use, and travel.

Merchant Fees: The organization collects the vast majority our revenue via credit card, using the website. Fees are paid to the merchant processor for providing the mechanism and licensing to accept credit card payments.

Administrative and Other Expenses: These include legal costs, office expenses, and other costs necessary to run the business.

Excess Revenues over Expenses

Overall, the excess revenue over expenses for certification and class revenue is designed to cover administrative costs, furthering continuous education in third-world countries, and other operating costs of the nonprofit business.