
Policy
It is the policy of INCOSE that Long Range and Annual Planning will be accomplished at the organizational level, within the context of meeting organization-wide goals.

Definitions
Long Range Planning is the process whereby INCOSE describes its vision, mission, and goals. This includes forecasts on future opportunities, criteria on what constitutes success, goals identification, selection and prioritization of initiatives and projects to meet these goals, and resource allocations to support the execution of the approved initiatives and projects.

The Systems Engineering Technical Vision (SETV) is a fifteen-year, forward-looking, characterization of the state-of-the-art for Systems Engineering. The SETV has current year, five, and fifteen-year views of Systems Engineering and describes various capabilities that will be needed to meet the needs of the profession. The SETV will be updated every two years and serves as a source of stakeholder needs in support of INCOSE Long Range Planning.

The Long Range Plan (LRP) is a five-year, forward-looking, strategic plan for INCOSE that captures the knowledge and information generated by the Long Range Planning Process. The LRP is updated annually to account for progress against the plan, incorporation of new initiatives and projects and adjustments to priorities.

Annual Planning is the process whereby the goals and objectives of the LRP are broken down into an integrated operating plan for the current calendar year. The Annual Operating Plan (AOP) is based on the LRP and contains brief descriptions of the approved initiatives and projects, their allocated budgets, and other organizational-level financial and performance objectives for the calendar year. The AOP is used to control the utilization of INCOSE resources, measure performance and manage the organization.

The INCOSE Guide to Planning describes the planning stakeholders, the annual planning process and cycle, and the lifecycle for INCOSE products.

Responsibilities
The Board of Directors is responsible for setting the strategic direction of INCOSE by establishing overall policy, goals, and supporting objectives. The Board approves the annual revisions to the LRP and AOP. The Board approves revisions to the SETV.

The President-Elect is responsible for facilitating the long-range planning activities, development and maintenance of the LRP and guiding the updates of the SETV. The President-Elect approves the Planning Guide for the long range and annual planning process.
The Treasurer is responsible for financial guidance, consolidation of financial data and assessment of financial performance.

The Budget and Planning Committee, under the leadership of the INCOSE President Elect, is responsible for development, oversight and maintenance of the AOP. To aid in the development of an integrated AOP, the Budget and Planning Committee will establish AOP Planning Guidance.

The Corporate Advisory Board, Technical Board, Directors and Administrative Committees are responsible for collecting and prioritizing stakeholder needs, and also establishing goals and objectives for their respective areas of responsibility that are in accord with the established AOP Planning Guidance.

Committee and Working Group Leaders need to ensure timely input of their needs and status to Corporate Advisory Board (CAB) Chair, Technical Director, Sector Directors, and Administrative Committee Chairs to support the BOD in the preparation and maintenance of the LRP and AOP.

The Budget and Planning Committee will integrate the needs of the various boards to develop an AOP for INCOSE at the organization-wide level that complies with the AOP Planning Guidance. The AOP will then be signed by the members of the Planning and Budgeting Committee and approved by the Board of Directors. The Approved plan will be shared with the overall membership.

The AOP will be monitored regularly and reviewed at all BOD meetings. More frequent review shall be performed as the situation warrants, as established by the President.

SUPERSEDES:  BOD-200 dated October 8, 2005
APPROVED BY:  INCOSE Board of Directors, Jacksonville, Florida, USA, January 25, 2012
MAINTAINED BY:  President-Elect