FIVE YEAR REPORT
Dear Colleagues,

The INCOSE Foundation is proud to present this Five-Year Report, summarizing activities and accomplishments of 2015-2019. You will note several changes in Board Members. First, we thank those who served so well and we welcome new Board Members who have shown leadership in their own professional lives and have agreed to share that with The INCOSE Foundation.

We are pleased to report that, through the generosity of our Systems Engineering friends and supporting organizations, our financial position is solid.

Overall, donor support since the inception of The INCOSE Foundation has resulted in total contributions of $842,770 USD. Bill Ewald had a goal of achieving 1 Million USD and we are close to that. We have, of course, used the funds appropriately to support various projects and scholarships over the years. This Report will give you a good picture of how these donations have supported the overall mission of advancing systems engineering.

We continue to be grateful to you, our supporters, whose generosity makes everything possible. It is our goal to support programs that help the INCOSE Foundation fulfill its place in making this a better world to live in and that we will continue to earn the confidence that our flagship donors have placed in us to promote the best practices of systems engineering.

The future is extraordinary and challenging – and, with your help, we will continue to meet the challenge.

John Snoderly, PhD
Chairman
INCOSE Foundation
A Message from the Managing Director

The INCOSE Foundation is dedicated to making a difference in people’s lives by advancing the development of systems engineering practice throughout the world. The Directors of the INCOSE Foundation are committed to the substantive role we play in developing and rewarding skills through the grants we bestow.

What follows is a review of the past five years of activity. We have compiled the financial data for The INCOSE Foundation for the years 2015 – 2019. If you look at the numbers only, you will see some years with a deficit in assets at the end of the year and some years with an increase. A foundation’s measure of its financial position depends on three main things:

- Dispersals of funds in accordance with the activities of the foundation (grants and scholarships/administrative fees)
- Donations
- Investments

Until 2019, The INCOSE Foundation offered five scholarships:

- ISEF, the International Science and Engineering Fair INCOSE Award to a pre-college student
- The Chesapeake Chapter Award for undergraduates (Three $500 awards)
- The JHU Alexander Kossiakoff Award to a student in a Masters or Doctoral program
- The Stevens Doctoral Award for Promising Research in Systems Engineering to a Ph.D Candidate
- The James E. Long Award for Post Doctoral work.

Of these five, three have been subsidized by institutions other than individual donors to The INCOSE Foundation.

ISEF is supported through the generosity of the INCOSE members – INCOSE Fellows – who donate their time and assets; and, through some financial assistance from The INCOSE Foundation. Our donors make this possible.

The JHU Alexander Kossiakoff Award has been supported through a grant to the Foundation from Johns Hopkins University. That Award, at JHU’s decision, is being discontinued.

The Stevens Doctoral Award for Promising Research in Systems Engineering has been supported by a grant from The Stevens Institute. We are pleased to announce that The Stevens Institute has renewed support for this Award.

The Chesapeake Chapter Award for undergraduates is supported by donations through the Chesapeake Chapter and administered by The INCOSE Foundation.

The James E. Long Award for Post Doctoral work was established by the Long family to honor James Long’s work in Systems Engineering. It, too, is supported by donations from individuals.

A similar fund was set up after the untimely and tragic loss of David Wright. These funds have been used to support advancement of work in Systems Engineering by INCOSE members.

In the past few years – and you will read about this in this Five-Year Report – The INCOSE Foundation has chosen to give a number of grants to INCOSE chapters and Working Groups. The INCOSE Foundation Board agreed that this would be both an effective way to support the advancement of systems engineering throughout the world and also to inspire additional donations to The Foundation.

We are grateful to all of our donors who have allowed the INCOSE Foundation to maintain its commitment to providing financial support and institutional encouragement through our various funds.

continued on next page
Grants and Awards

To recognize the 25th Anniversary of INCOSE, The INCOSE Foundation thought there could be no better way than to open up an award cycle and give financial support to INCOSE Chapters around the globe. We invited submissions from any Chapter. What follows is a summary of the projects awarded grants.

SOARizona, the Southern Arizona chapter was, at the time, a small chapter trying to become more active, this grant enabled three actions that assisted in continued chapter growth and awareness.

1. Provided funds for budget contribution to planning a Regional Mini Conference with California and other Arizona chapters.
2. Provided funds to add to a scholarship award to a graduate student at the University of Arizona, the winner selected to use the scholarship funds to cover the costs of achieving INCOSE SEP certification.
3. Provided funds to enable chapter representation at the INCOSE 25th anniversary IS – the chapter had not supported sending an officer to an IS or IW in 5+ years. This was a great enabler for bringing back INCOSE’s vision to the chapter, as well as furthering connections for chapter meetings and events.

The Liberty Chapter, with its grant, provided the Arron Decker School in Andover New Jersey with $1,000 in support of their STEAM (Science Technology Engineering Art Math) efforts.

INCOSE India received two grants, one for holding a systems engineering student competition, and another for organizing a systems engineering workshop. Follow this link to see what the competition entailed: https://sites.google.com/a/pes.edu/system-engineering-challenge/home

INCOSE Singapore Chapter used the grant to promote the Chapter through printed materials as well as a direct marketing campaign. https://www.incose.org/incose-member-resources/chapters-groups/ChapterSites/singapore/chapter-news/2015/12/31/singapore-chapter-promotional-event-well-received

The Cleveland-Northern Ohio Chapter supported 9 students who attended the Great Lakes Regional 9 Conference. Nine Students were awarded the INCOSE Systems Engineering Handbook plus their choice of another textbook. The chapter expectation was that augmenting the students’ experience at the conference would encourage their continued participation in INCOSE and in systems engineering research at their respective institutions.

INCOSE Swiss Chapter used their grant for the SWISSED15, the Annual Symposium of the Swiss Systems Engineering Society (SSSE). The well-received event helped increase the awareness for SE in Switzerland. For more details have a look at: http://www.ssse.ch/swissed2015

It is also important to note the administrative support The INCOSE Foundation receives from Universal Management, the company that manages the affairs of both INCOSE and The INCOSE Foundation. Of course these are services for which we pay but the dedication of the administrative team goes beyond a mere “pay check”. It is always hard to define the back-of-the-office activities performed by admin so let this be a shout-out to the wonderful people who work with us.

At the cusp of 2020, it is perhaps a good time for The INCOSE Foundation to review its place in the systems engineering universe. We welcome your thoughts and consideration – as well as your continued support.

Holly Witte
The INCOSE Foundation
Managing Director
Grants and Awards (continued)

**INCOSE Chapter Poland** dedicated its grant to forming the structure of the Chapter’s website, promotion activities, and research on the status of systems engineering in Poland.

**INCOSE Chesapeake Chapter**, as several others, used their grant to create permanent display materials to spread the systems engineering and INCOSE word. The Chapter leveraged in-kind support to produce the materials and increase marketing activities.

**INCOSE South Africa Chapter** applied their grant funds toward financing their youth outreach initiative, the Greatest Young Systems Engineer of the Year (GYSEOY) challenge.

**San Diego Chapter of INCOSE**, every year, produces a fund-raising event on board the USS Midway Museum. With the funds raised, the chapter bestows grants to local schools in San Diego County engaged in STEM programs. In the year of this award, the chapter was on the verge of cancelling because their treasury could not support all the costs. The INCOSE Foundation award allowed them to go forward – and they continue to produce this event each year.
Grants and Awards (continued)

With the success of its 25 at 25 Grants in 2016 to celebrate the 25th Anniversary of INCOSE, your INCOSE Foundation continued this important funding program by inviting Chapters and Working Groups to tell us about the work they are doing to advance Systems Engineering. The following nine grants represent a breadth and depth of outstanding projects we were delighted to support.

**Greatest Young Systems Engineer of the Year Challenge** – Competitors are given a systems engineering challenge, SE process training and MBSE Tool training. Winners receive a prize at the annual INCOSE SA 2017 Conference.

**STEM program in Indianapolis inner city schools** – a collaboration between the INCOSE Crossroads chapter and the 100 Black Men of Indianapolis organization. Three grade groups participate.

**The evolution of a system model**, capturing the overall architecture, identifying key interfaces, and establishing the control means and functional behavior of the energy microgrid in select counties of Cayuga Ohio. INCOSE Power and Energy WG.

Support for the input of data on **Systems Processes Theory & Systems Pathology** – How Systems Work and Don’t Work into one, SE organized and useful Relational Data Base allowing multiple searches by SE engineers, in the pursuit of systems mimicry and practical engineering solutions to systems problems. Systems Science Working Group.

**Initiation of a New Professional Society** – International Society for Systems Pathology (ISSP): a new professional society that unifies many different systems approaches to how systems fail to better inform SE design & delivery. SSWG (Systems Science WG) and NSWG (Natural Systems and Complex Systems WG)

Promotion of the systems engineering approach in Poland and **promotion of the INCOSE Polish Chapter** in different societies in Poland.

**Starshine Academy beta test of the SySTEM Educator Initialization material and method**. The effort focuses not on the students but on preparing educators to create excellent learning environments for youth, ages 5 through 16. Educator Initialization detects those who can get beyond teaching to serve as Leaders of Learning about STEM and Systems then encourages them to become an autonomous community of continuous innovation for promulgating the education. Jack Ring leads this project.

As INCOSE UK grows so does the responsibility to members to deliver a professional capability that is based on solid Systems Engineering principles. The aim of this funded project was to **define and develop a model of INCOSE that can be used to meet the mission of INCOSE by applying it to INCOSE**.

**Technical Operation Policy Review/VSE Product Development** – The internship position supported the INCOSE Assistant Director for Internal Operations on a 2017 activity that coordinated an international review and update of the Technical Operations (TO) policies and procedures for this premiere international body and world authority on Systems Engineering.

**Software Traceable API Standards** – The project goal was to pioneer and transform an oil and gas (O&G) industry standard to a requirements holistic model compatible systems software module by developing a process that can be repeated to produce traceable requirements from API standard(s) using software tools and the holistic requirements model.
Stevens Institute Doctoral Award Winners

The INCOSE Foundation, in collaboration with The Stevens Institute, continued to bestow the Stevens Award in 2015, 2017, 2018 and 2019.

The Award is made for promising research in systems engineering. As Dr. Yehia Massou, Dean of the School of Systems and Enterprises at Stevens puts it:

“Stevens is proud to be the sponsor of a doctoral award for promising research in systems engineering. Our planet’s future depends on the work being done today by many young researchers, including the people recognized by this award over the years. Giving them a chance to showcase their research towards becoming a leader in systems engineering is so very important.”

— Dr. Yehia Massou, Dean of the School of Systems and Enterprises at Stevens.

The Foundation proudly recognizes all of its Stevens Award winners to date

2002 – Wassilis Agouridas, University of Leeds, UK
2003 – Thomas Hearld, Jr., Lockheed Martin and Stevens Institute of Technology, USA
2004 – James Benjamin, Stanford University
2005 – Gnana Bharathy, University of Pennsylvania
2006 – Susan Vandiver, Southern Methodist University
2007 – Jo Ann Lane, Viterbi School of Engineering at the University of Southern California
2008 – Renzhong Wang, Missouri University of Science and Technology
2009 – Ana Luisa Ramos, University of Aveiro, Portugal
2010 – Jason Dauby, Missouri University of Science and Technology
2011 – William Johnstone, University of British Columbia
2012 – Clement Smartt, University of Texas at Arlington
2013 – Louis E. Pape II, Missouri University of Science and Technology
2014 – Siddhartha Agarwal, Missouri University of Science and Technology
2015 – Mohsen Mosleh, School of Systems and Enterprises at Stevens Institute of Technology
2017 – Scott Delbecq, Institut National des Sciences Applicquées de Toulouse
2018 – Edwin Ordoukhanian, University of Southern California
2019 – William Bihlman, Purdue University
Johns Hopkins University/Applied Physical Laboratory

Alexander Kossiakoff Scholarship

The last two of these important fellowships carried on the tradition of recognizing and encouraging students to engage in applied systems engineering research.

In 2015, the Award was presented to Ali Raz who was a Ph.D. candidate in Aeronautics and Astronautics at the Purdue University Center for Integrated Systems in Aerospace. His research interests are in System-of-Systems Engineering and Information Fusion. He is an INCOSE Certified Systems Engineering Professional (CSEP) and, at the time of the Award, he was serving as president of the INCOSE student division of Purdue University.

The next, and final, award was made to Marilee Wheaton, the INCOSE President-elect.

The INCOSE Foundation proudly recognizes each JHU/Alexander Kossiakoff Award winner:

2009 – Andrew M. Pollard
2010 – Colin J. Mullery
2011 – Gabriel W. Lewis
2012 – Douglas W. Orellana
2013 – Thuc Tran
2014 – Chi H. Sun
2015 – Ali K. Raz
2018 – Marilee J. Wheaton
Corporate Advisory Board Annual Wine Soirée

Thanks to the Corporate Advisory Board the Annual Wine Soirée is always a success!

The Corporate Advisory Board, each year, generously hosts the Wine Soiree at the International Workshop, The INCOSE Foundation’s only fundraising event. We thank the CAB Chairs and every CAB member for making this such an elegant event. Wines from all across the INCOSE global footprint are donated by generous chapters and individuals who make gifts to The INCOSE Foundation year after year; ASK International and UMS, for their continued underwriting of portions of the evening. Every year, beautifully prepared and presented foods are selected to complement the wines; and, stylish people gather for good conversation and to celebrate the Foundation. All of these elements add up to a major success each year.

Soirée Five-Year Revenue

- 2015 – $8734
- 2016 – $5835
- 2017 – $8599
- 2018 – $9566
- 2019 – $9744

Annual Wine Soirée photo highlights

[Images of people at the event]

### Income and Expense – 2015

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### Income and Expense – 2016

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### Expense 2015

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### Expense 2016

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**NET INCOME**

**– 40,947.99**

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### Income and Expense – 2017

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### Income and Expense – 2018

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### Income and Expense – 2019

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### 2015 – 2019 Year-to-Date Profit & Loss

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<td>Scholarship Expense</td>
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<td>Bank Charges</td>
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<td>Brochures</td>
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<td>Misc Expense</td>
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<td><strong>Total Expense</strong></td>
<td>321,680.37</td>
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<tr>
<td><strong>NET INCOME</strong></td>
<td>3,877.45</td>
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2015-2019 Grants

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<th>Date</th>
<th>Name</th>
<th>Memo</th>
<th>Class</th>
<th>Debit</th>
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<th>Orig. Amt</th>
<th>Balance</th>
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<tbody>
<tr>
<td>05/20/2015</td>
<td>INCOSE Central</td>
<td>Chapter Grants 2015 ($1000 applying towards South Africa Donation + $1500 to INCOSE for SA Chapter)</td>
<td>201 General Fund</td>
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<td>06/29/2017</td>
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<td>206 James E. Long</td>
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</tbody>
</table>

Total Grant Expenses: 45,750.00 1,500.00 44,250.00

TOTAL: 45,750.00 1,500.00 44,250.00
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2006 – 28 donations totaled $34,118
2007 – 77 donations totaled $63,888
2008 – 84 donations totaled $53,174
2009 – 104 donations totaled $29,896
2010 – 271 donations totaled $46,810
2011 – 342 donations totaled $67,109
2012 – 284 donations totaled $61,375
2013 – 145 donations totaled $53,002
2014 – 250 donations totaled $157,579
2015 – 297 donors totaled $39,422
2016 – 290 donors totaled $51,769
2017 – 379 donors totaled $48,203
2018 – 316 donors totaled $66,267
2019 – 353 donors totaled $36,819

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