



# **Annual Operating Plan**

**Fiscal Year 2006**

Release 1.0  
October 9, 2005

Prepared by Pat Hale  
Treasurer

## 1.0 INTRODUCTION

The 2006 Annual Operating Plan (AOP) is the first to span the new INCOSE fiscal year, which will be the same as the calendar year from January 1, 2006 on, and is the first prepared under the new planning guide and format. The INCOSE AOP serves to lay out planned activities and corresponding monetary resources for the fiscal year, including recurring annual expenses and, in section 16 of the budget, non-recurring investments in special projects. There have been revisions to budget line organization and content (described in section 4.0) for clarity and simplicity. Linkages to other INCOSE planning documents (listed in section 2.0) are described in section 3.0.

## 2.0 REFERENCES

The following references are called out in section 3.0 to link long-range and technical plans to the annual operations:

- A. INCOSE Long Range Plan (LRP) [with 2005 Assessment Report], June, 2005, 8 pp.
- B. INCOSE Systems Engineering Technical Vision, Revision 2, July, 2005.
- C. INCOSE Agenda 2006, (no revision control), last presented July 2005.

## 3.0 ANNUAL PLAN

### 3.1.1 Scheduled Meetings/Major Events

Currently planned events include:

- International Workshop 27 Jan-1 Feb 2006, Radisson Ft. McDowell Resort, Scottsdale, AZ.
- April (2<sup>nd</sup> quarter) BOD Meeting, April 21-23, 2006, Stevens Institute, Hoboken, NJ.
- International Symposium July 8-14, 2006, Omni Orlando Resort, Orlando, FL.
- Fall (4<sup>th</sup> Qtr) BOD Meeting, September 18-20, 2006, Loughborough Center for SE Research, UK (tentative).

### 3.1.2 Initiatives and Projects

The following descriptive paragraphs provide a synopsis of significant (greater than \$10K total budget request) initiatives and projects with planning document references. The general format will be as follows:

- [Item Name] [LRP Reference, TPP/other reference, Budget line item(s)]

Brief Description

Significant FY06 deliverable/products

{Optional} Issues/questions

#### 2006 Initiatives and Projects

- Certification [LRP AP-1, TPP 5, BLI: 21.i (Certification Income), Expense section 21 (4 lines), Certification Operations Net (between expense and investment budgets- unnumbered), 16.2 (Investment budget)].
  - The INCOSE Certification program, leading to designation as a Certified Systems Engineering Professional (CSEP), is estimated to be one year behind the schedule as revised in 2004. Progress was made in the past year in streamlining the application process based on initial applicant experience and in developing a job description, scope of work and RFP plan for the Program Manager position. Remaining issues are:
    - Rollout (Marketing) of the program: The CSEP program team has been coordinating with Communications for structuring a marketing initiative. With our 'all-volunteer' structure, this may not be sufficiently expeditious, so I have increased the 2006 marketing investment budget to \$35K to facilitate outside assistance, and the new PM contract will include oversight of marketing.
    - Awarding the PM contract: It appears that the content of the PM RFP is available- the RFP will be released (the CSEP team is open to suggestions regarding appropriate release sites/media beyond INCOSE.org). The anticipated schedule in 2005 is:
      - RFP Release: 10/15
      - Responses: 11/30
      - Evaluation: 11/30-12/31

- Prometrics is reported to have been dragging their feet on making the CSEP test available. Negotiations on release date have thus far been unproductive, and assistance from the BOD may be required. We will discuss the situation in Ottawa.
  - Significant FY06 deliverables:
    - Recommendation to the BOD for PM contract award: By IW2006, with award to follow immediately.
    - Marketing campaign release: 1Q06
  - Issues: We have made a significant long-term investment in this initiative over the past 4 years. We need to assist this team with both time and other resources to remove the final roadblocks and get the program underway in order to assess whether our models and expectations are realistic. It is likely that a paid program manager will aid substantially in making progress, but we need to supplement as necessary to reach a meaningful conclusion and projections in FY2006.
- INCOSE.org Re-Engineering [LRP AP-9, BLI: 16.4]
  - Complete the web and member database, email implementation.
  - This item should complete in FY06- \$47K funding is rolled over from FY-05.
- INCOSE General Marketing Inserts [LRP SI-1,2,3; BLI: 16.45]
  - This project completes marketing inserts for all general marketing via the INCOSE folders developed in FY05. All inserts are covered in this item except the CAB, which is in BLI: 16.14.5
  - Initial inserts should all be delivered in FY06; funding is \$22K.
- INCOSE Foundation [LRP SI-11, BLI: 16.8]
  - The Foundation is a charitable organization established by INCOSE to build and sustain INCOSE's reputation as the leading systems engineering professional society. The foundation is in the establishment process through IRS filings.
  - Significant FY06 Deliverable: INCOSE will make an initial investment of \$10,000 as part of establishing the foundation. The

filing and formation process should complete early in FY06.

- Systems Engineering Handbook Version 3 [LRP AP-2, TPP 4, BLI: 16.11 plus portions of Section 7]
  - The Systems Engineering Handbook is intended as a comprehensive guide for practitioners to study and implement best practices in systems engineering across a broad set of domains. The investment budget portion of this initiative supports teleconference expenses and professional technical editing help to create version 3.
  - FY06 Deliverables:
    - Final review copy submission 1Q06
    - Publish/release public copy 2Q06
- INCOSE Systems Engineering Vision [LRP TV-1, BLI: 16.12]
  - The INCOSE Systems Engineering Vision (formerly the INCOSE Technical Vision) is a collaborative forecast of the expected trends and implications of systems engineering theory and practice. As part of this initiative, there will be a dedicated meeting at IW06 to extend the participation and provide comments/material for V2, which will include consensus from organizations beyond INCOSE.
  - FY06 Deliverables: Version 2.0 3Q06; \$12K for additional day at IW, \$3K for travel associated with collaboration beyond IW
- CAB Member Profile Database [LRP n/a, BLI: 16.14]
  - The CAB member profile database is a new proposal to survey and document the company, sector and stakeholder demographics for all CAB organizations. The size and diversity of the CAB has increased to where this data would be useful for INCOSE's understanding of SE trends in industry.
  - FY06 Deliverables: Complete in FY06 (baseline). \$5K requested in FY07 for refinement, \$2K thereafter for maintenance.
- CAB Brochure [LRP SI-2, BLI: 16.145]
  - This proposal develops a CAB brochure for recruiting and INCOSE image enhancement within the corporate sector. The budget request is for \$8K in 2006, \$5K in 2007. This material will be coordinated with the Commercial Steering Board to facilitate

INCOSE's commercial industry outreach.

- FY2006 Deliverable: Initial release
- CAB/NDIA Systems Engineering Effectiveness Studies [LRP n/a, BLI: 16.15]
  - This is a proposed 5-year set of studies in conjunction with NDIA to document the effectiveness/value of systems engineering with actual data in answer to a long-standing CAB need. The proposed budget is \$15K/year for five years, beginning in 2006.
  - FY06 Deliverables: Baseline study results.
  - Issue: Collaborate with NDIA or separate INCOSE effort with international and commercial extensions? To be worked at IW.

#### 4.0 OPERATING BUDGET

The 2006 Operating Budget is attached as an Excel spreadsheet, with notations to explain the content/purpose of lines which are not self-explanatory. Budget Lines are color coded as indicated at the top of the spreadsheet.

Some historical budget lines have been re-grouped for clarity – for example, all 'membership' or 'chapters' related lines have been combined under the Member Board in section 17.

A new line item, 22.0, has been added to provide a nominal discretionary budget for the INCOSE Fellows to jump start initiatives that may be started during the year.

A \$5K investment initiative is added in line 16.16 as a pilot INCOSE support budget for Engineers' Week, to complement INCOSE chapter donations and activities, under the oversight of the Member Board.