

# INCOSE ANNUAL OPERATING PLAN 2018

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## 1. Introduction

This INCOSE Annual Operating Plan (AOP) describes the planned activities funded by the INCOSE Budget in 2018. The purpose of this narrative is to guide the activities through the year, and to ensure that INCOSE members understand the organisation's priorities and how it intends to achieve them.

This 2018 AOP was created in the context of INCOSE's Vision, Mission, Goals, and Strategy – described as a set of Five-Year Objectives. As an annual plan, this AOP is informed by the INCOSE Long Range Financial Planning process, which is led by the Budget and Planning Committee of the INCOSE Board of Directors.

## 2. INCOSE Mission, Vision, Goals, Values and Principles

These are defined and promulgated on the INCOSE website. They are not repeated here, but are reflected in this AOP.

## 3. INCOSE Five Year Objectives

The five-year objectives emerged in 2015 as a result of strategy sessions conducted by the BoD, and in cooperation with chapter and working group leadership. The INCOSE 5-year objectives guide policy and budgeting decisions. They are demanding and intended to allow us to make significant progress in evolving INCOSE, although it is recognized that some of the objectives may require more than 5 years to fully accomplish. Each objective is provided with its short title, the name of the current champion, and a brief description of the intended outcomes and supporting strategies.

### 3.1 Growth

Led by the Director for Strategic Integration

**Objective:** INCOSE membership doubles and embraces the healthcare, mobility, and energy business sectors.

Supported by five strategies:

- **Define Value Streams:** Drive growth through higher value and impact by formalizing the primary product and service offerings of INCOSE (including professional certification, membership – focused on both recruitment and retention, publications, professional development, and events) into value streams; each value stream will have performance metrics, growth targets, incentive structures, budget, and a mix of paid and volunteer labor; revise IT, accounting, and other INCOSE internal systems to support the success of each value stream; invest resulting additional revenue to deliver much higher membership value, which will reinforce growth.
- **Recruit and Retain More Systems Engineers:** In targeted industries, address those whose primary role is performing systems engineering, including those who are not called systems engineers, and make them aware of the full range of value that INCOSE offers them; attract them to INCOSE with customized offerings; focus significantly on raising membership renewal rate.
- **Grow and Leverage Corporate Members:** In targeted industries, operate a continual marketing and recruiting campaign to add new CAB members, especially for the new category of very small companies; that campaign will highlight the benefit of Associate Members, a new membership category for CAB members; strive to convert Associate Members to Individual Members.
- **Integrate Objectives:** Clarify the relationships among all strategic objectives so INCOSE can explicitly leverage those relationships to achieve greater success for each individual objective and greater impact from the collective set of objectives.
- **Leverage Membership Demographics:** Focus membership expansion in geographical areas where INCOSE already has a strong presence (US, Western Europe, Australia, South Africa, Israel) through actions to encourage new individual members in Chapters and CAB companies as well as in some other countries such as China and India; also focus membership expansion in business sectors where INCOSE has a strong presence or seeks a strong presence (Aerospace, Defense, Healthcare, Energy and Transportation).

### 3.2 Alliances

Led by the Director for Outreach

**Objective:** “INCOSE amplifies its ability to achieve its mission through diverse alliances”

Supported by two Strategies:

- **Chapter, et al Leverage:** Leverage synergies with allies at global, sector, regional, and chapter levels while ensuring specific benefits at each level
- **Industry Associations:** Develop and leverage alliances with industry associations representing targeted industries; seek collaboration around Systems Engineering Vision 2025

The primary desired outcomes for 2018 for Alliances are:

- a. Develop a set of Strategic Alliances with other professional bodies, with the intention of achieving significant impact through collaboration on events and publications.
- b. Support Tech Ops Working Groups in the development and renewal of essential MOUs, and retirement where appropriate.
- c. Reach out to target industries (healthcare, mobility, and energy business sectors) to encourage growth in membership, increase INCOSE impact, and ensure that INCOSE events contain attractive and relevant content. This is managed by the Industry Outreach Board.
- d. Reach out to adjacent disciplines and domains to promote INCOSE and Systems Engineering to a wider audience, and to seek collaborative opportunities.
- e. Continuation of the Local Chapter Outreach initiative.
- f. Support EWLSE as it engages with external organisations.

See also Section 4.2 on Outreach activities and objectives for 2018 onwards.

### 3.3 Education

Led by the Director for Academic Matters

**Objective:** INCOSE curricular recommendations are widely adopted around the world, raising the quality of engineering education.

Supported by two strategies:

- **Engineering Programs:** Advocate for incentives that encourage university engineering programs to integrate systems engineering and systems thinking into their curricula; create mechanisms such as curricular materials, experience reports, and adoption workshops, to help universities implement such integration
- **GRCSE:** Advocate for GRCSE to encourage university systems engineering graduate programs to adopt GRCSE; create mechanisms, such as curricular materials, experience reports, and adoption workshops, to help universities to implement such adoption

The primary desired outcomes in 2018 related to the Education Outcome and the supporting two Strategies are:

- a. The Worldwide Directory (WWD) of university systems engineering and industrial engineering programs will be transitioned to an online version. The directory will serve to increase the awareness of systems engineering programs among university administrators and faculty, potential engineering students and the public at large.
- b. Workshops on integrating systems engineering and systems thinking into the education of all engineers will have been held in international forums, creating a broader and deeper understanding of the importance of systems engineering education, what has been done in this area and what can be done to accelerate such integration worldwide.
- c. Awareness of INCOSE throughout ABET will be elevated through an outreach program at ABET events. Eventually, INCOSE wants to influence ABET

accreditation standards to incorporate systems-related criteria in engineering and cybersecurity.

- d. The Sigma Theta Mu honor society for university students with systems-related majors will expand by five to ten new universities in the US.
- e. New INCOSE Student Divisions will be created world-wide. INCOSE Student Divisions activities, their interaction with the local INCOSE Chapters and their local industry will be more prominent and visible, and will activate a burgeoning new generation of systems engineers
- f. Other activities supporting the advancement of the field including research workshops and workshops supporting the development of new faculty will be undertaken.

### **3.4 Impactful Products**

Led by the Technical Director

**Objective:** INCOSE produces and brokers the most impactful systems engineering information in the world, grounded in effective practice and research.

**Key Definitions:**

**Impactful** - Broad interest across the globe and across domains; and/or clearly a topic that will advance the skill of Systems Engineering; and/or information that is critical to the growth of Systems Engineering; as decided by the Impactful Product Committee chartered by the BoD

**Products** – Webinars, Video clips, Presentations, White Papers, Guidelines, Booklets, Books, databases, software tools and other re-useable artifacts.

**Brokered Products** – Not made by INCOSE directly but instead: worked on by INCOSE members, or cited by INCOSE made products, or used with permission by INCOSE, or linked on the INCOSE website, or put in the INCOSE store, put on INCOSE connect, or made available through INCOSE social media (twitter, Facebook, LinkedIn) or distributed through other INCOSE (or INCOSE partner) channels

**Supported by two Strategies:**

- **Bottom Up:** Harvest high impact products initiated and developed by chapters and working groups
- **Top Down:** Sponsor technical initiatives, including funding and other resources, selected by the Impactful Products Committee, as strategically important to both individual and corporate members

The key intended outcomes in 2018 for the Impactful Products initiative include:

- Anthology publications
- Develop new publisher relationship for small publishing & print on demand jobs
- Migration of chapter & member products to bookstore
- Institutionalize automatic metrics for product health

- Get approval for INCOSE Product Development Policy
- Merge Impactful Products committee work into Policy/Procedure driven operations

Critical dependencies to achieving the five-year objective are as follows:

- Teach INCOSE that Products come in many forms: video webinars & plenaries, standards, white papers, guidelines, & books
- Define the life cycle process for all INCOSE product development
- Increase public awareness of INCOSE products
- Drive a user friendly, product-centric INCOSE website (especially bookstore)
- Select & monitor metrics & surveys related to satisfaction, access, citations & awareness from INCOSE website, bookstore, Wiley, membership & social media

To support these goals, 2018 funding is planned for these tasks:

- Analytics support to create a living dashboard for INCOSE Product metrics
- Product commercialization support for anthologies, guidelines & other emerging products from TechOps

### 3.5 Impactful Forums

Led by the Associate Director for Events

**Objective:** INCOSE produces and supports the most impactful forums in the world on systems engineering practice, policy, education and research.

Supported by three strategies:

- Encourage and coordinate global forums that address targeted audiences and expand face-to-face and virtual participation; forums include those that are INCOSE-branded, as well as events held in conjunction with allied organizations.
- Explore innovative ways to bring SE knowledge to members rather than members to centrally located events (example: Nordic SE Tour model).
- Research a distributed model for forums for greater collaboration and information exchange when co-location is not always financially possible for participants. Look to sponsor/promote a new event type in 2019.

### 3.6 Competency

Led by the Professional Development Steering Group

**Objective:** Leveraging INCOSE assets and relationships to enable and continuously improve the effectiveness of the global systems engineering workforce.

**Interdependency:** There are several activities that have a high degree of interdependency with this objective. They are:

- what have a high degree of interdependency
  - [INCOSE UK] Systems Engineering Competencies Framework: INCOSE-TP-2010-003
  - INCOSE Competencies Framework V 0.75
  - Awareness of learning offerings: Advertising via eNote, newsletter, INSIGHT, and *Systems Engineering*

- INCOSE IT Infrastructure: Member Database, Store, Webinars, SE journal, INSIGHT, Symposium Proceedings, SE Handbook Course, Chapter Products and Courses
- Existing lifelong learning providers
- Existing lifelos, series, and capabilities
  - INCOSE Competencies Framework V 1.0, July 2018
  - Learning Offerings within INCOSE and from suppliers
  - INCOSE Certification Offerings
  - Establishment of Mentoring

Supported by two strategies:

- Business model development
  - Market research and business model options
  - Market research and business
    - Supplier interviews
    - User interviews
    - Benchmarking against other offering lifelong learning offerings
- Technical product development
  - Prototyping projects for a professional development portal known as i-SELECT (INCOSE Systems Engineering Learning Environment for Career Transformation)
  - Lifelong learning platform demonstrations and prototyping

The primary objective to be achieved by January 2020 is to launch at least a Beta version of I-SELECT and possibly a more mature version.

### 3.7 Transformation

Led by the Technical Director (Delegated to the Assistant Director for Transformation who also leads Transformational Enablers)

**Objective:** INCOSE accelerates the transformation of systems engineering to a model-based discipline.

Supported by two strategies:

- **Fitness:** Clearly demonstrate Systems Engineering as a chief value contributor within the larger digital context. Enable model based systems engineering methods to address growing complexity and megatrends such as Digital Transformation, Industry 4.0, IoT, artificial intelligence, computing, communications and storage everywhere, 3D printing, cyber security and big data/data science.
- **Community Advancement:** Build a broad community that promotes and advances the transformation of systems engineering and the role it plays in the larger digital transformation systems engineering plays in it
  - Infuse model based methods throughout INCOSE products, activities and WGs. Encourage and promote collaboration and model based methods.
  - Engage stakeholders to assess the current state of practice, determine needs and values of model based methods. Develop diverse stakeholder representative group to help move the transformation effort forward. Develop and support MOUs with institutions that will help move the transformation effort forward (NAFEMS, BIM, INFORMS, Others)

- Advance stakeholder community model based application and advance model based methods. Engage practitioners and universities to advance model based methods

The key intended outcomes in 2018 include:

- a. Work toward achieving the future state outlined in Vision 2025
- b. Follow Transformation strategic plan and execute key activities to achieve objectives.
- c. Further integration of Working Groups and the production of more model based products
- d. Develop a product that contains a collection of compelling storylines and case studies that help change agents within organizations make the case for transformation.
- e. Roll out the assessment roadmap to the broader stakeholder community. Develop migration paths to share with organizations
- f. Publish Transformation Products which encompass efforts to date (stakeholder community, roadblocks and enablers, assessment roadmap, etc.
- g. Use MBSE Initiative as an incubator to increase engagement in key areas to promote transformation

To support these goals, 2018 funding is planned to be spent on the following tasks:

- Engagement across Sectors I, II and III
- Support to Semantic Technologies for Systems Engineering (ST4SE)
- Quarterly Core Team Meetings
- Collaborations with CIMDATA, ASSESS, NAFEMS, OMG, ASME and others
- Domain Specific Support (SAE, BIM, CI, NDIA et al)
- Engagement with academia via CSER, SERC and research meetings
- Transformation Industry/Corporate meetings
- Tool vendor engagement such as No Magic World Symposium
- Desktop Publishing of Transformational products and promotional materials

#### **4. INCOSE Budget Lines**

This section of the AOP provides a short description of the main activities in each line.

##### **4.1 Events**

The Events committee will ensure the effective and financially sound conduct of the International Workshop and International Symposium in 2018, as well as any early planning and contractual activities necessary for the same events in 2019 and 2020.

In addition, the committee will look at the range of events taking place at chapter, national, and sector levels and encourage the development of new Events that capitalize on these initiatives. Specifically, the committee will explore additional options for co-sponsoring a conference with related professional societies or becoming a technical sponsor of critical/related conferences. The Events committee will investigate options into satellite workshop events with the goal to increase participation in working group activities for individuals who cannot travel to the International Workshop in the United States. The

committee will likewise investigate options for additional types of events ("tours", TED-like events, etc.).

Finally, the Events committee will work with KMD to develop a set of centralized capabilities that can be used to plan and support INCOSE related events that are not run by the Events committee. Examples include packaged website capabilities, events app, and registration systems.

## 4.2 Outreach

INCOSE Outreach seeks to engage across geographic and application domain boundaries in order to contribute to the development and practice of systems engineering. This includes the identification and definition of outreach strategies and initiatives; coordination with other INCOSE entities on the execution of outreach campaigns; the identification, facilitation, and management of alliances; and the establishment and leadership of an appropriate supporting volunteer structure.

The main Outreach activities planned in 2018 are:

- Outreach to an increasingly wide range of Industries where Systems Engineering is applicable; this is managed by the Industry Outreach Board (IOB).
- Outreach to other related disciplines where there are clear overlaps which can be better understood and developed for mutual benefit. Most prominently, this includes the ongoing relationship with PMI, where the Outreach budget for 2018 now includes funding for a stand at the PMI World Congress. Other similar opportunities will be explored when they present themselves.
- Ongoing management of existing relationships, including assessment of existing MOUs to establish whether they should be refreshed or retired, and development of a generic MOU structure to support future Alliances.
- Continuation of the local chapter outreach initiative, providing seed-corn funding for local chapter leaders to engage in outreach activities with other professional bodies and societies which are dominant players in their local geographic area.

### 4.2.1 Industry Outreach

Industry Outreach seeks to grow and establish a sustainable membership of INCOSE members in industries where SE is applied, even when it is described using different language. This is achieved by directed initiatives aligned with the INCOSE strategic 5 year objectives that are carried out by dedicated resources and in collaboration with other INCOSE entities.

The approach taken is to work along four major areas of initiatives:

- Create visibility and attract new industry members via an effective value proposition;
- Empower leaders (e.g. Ambassadors) to engage industry members;
- Improve industry member value and engagement, including attractive industry IS programs;
- Enhance SE knowledge & practices among the widening industry community.

A special attention is given to grow the industry membership across the different geographical sectors.



The industries in focus for 2018 are aligned with INCOSE objectives and include Automotive, Healthcare, Infrastructure, Power & Energy and Ground Transportation (including consideration of “Future Mobility”)

#### **4.2.2 Management of Strategic Relationships**

INCOSE needs to continue with the formalization its Strategic Relationships in Memorandums of Understanding (MOU) and other equivalent agreements, and develop its pro-active approach to identify and manage relationships based on understanding of mutual value and costs. This includes assessing current MOUs to determine whether they need to be refreshed or retired.

The recently developed generic MOU will be essential to act as a basis for future Alliance development, and consideration should be given to developing a modular version that can be scaled appropriately to fit the collaboration being proposed.

### **4.3 Corporate Advisory Board**

The main activities for the Corporate Advisory Board during 2018 are detailed below.:

#### **4.3.1 A continued strong focus on determining and fulfilling the CAB’s Top Needs**

Strategic insight of the CAB will allow richer interactions with other INCOSE entities, which will result in products/services much faster than in the past. The CAB leadership will provide guidelines to the Technical Operations working groups in order to facilitate the production of highly needed products and services.

#### **4.3.2 CAB Evolution**

With the new CAB membership structure now in place, including Very Small companies and Associate Members, the focus should be on growing the numbers of both, without eroding our traditional base. We should also try to enable transitions from AM to individual membership.

#### **4.3.3 Value Proposition**

Demonstrating the value of CAB membership (and systems engineering in general) and the CAB’s role in increasing systems engineering competency continues to be one of the most significant issues facing the CAB.

### **4.4 Sectors and Chapters**

#### **4.4.1 Americas Sector**

The Director for the Americas Sector has developed a plan for 2018 focused on supporting INCOSE Growth objective through chapter membership initiative, support of struggling chapters and chapter partnerships to maintain momentum and support.

A number of activities and initiatives are planned in support of that goal:

- Use of a stakeholder survey to identify chapters with needs and to develop a gameplan to help these chapters.
- Foster partnership and collaboration between chapters.

- Help address chapter issues by engaging CIO to resolve on-going IT issues identified by Chapters. Use prioritized Chapter IT needs to advocate with CIO and also as-needed develop sector unique solutions using sector resources.
- Develop marketing and membership development initiatives by identifying a AD for Recruiting/Retention and executing activities, typically through the chapters.
- Revitalize the USA geographic Assistant Directors to provide greater information flow between INCOSE and the Chapters. Invest sector budget to support Director and AD travel to meet with chapter leaders.
- Supporting Chapter growth by use of use sector budget to support chapter and regional activities and events.
- Leverage the proximity of IS 2018 (and 2019) by offering scholarships to incentive participation.

#### 4.4.2 EMEA Sector

The EMEA Sector efforts will be focused in 2018 on the contribution to the Growth Strategic objective through support to Chapters in term of travel cost mainly to attend to global or regional events, to organize visits to emerging chapters and encourage their participation to events, to support participation to the leadership training programme and to facilitate the translation of documents (English to other language and vice-versa)

The following actions have been proposed in the AOP for the year 2018:

- Travel support to visit chapters:  
This activity will foster growth in the sector by creation of new Chapters and cooperation/synergies between big/mature and small/emerging Chapters
- Travel support to IW/IS for small or emerging Chapter leaders:  
This will help small or emerging chapters to be more visible and active with Central. This will also enable small or emerging Chapter to better participate to global events and therefore help them to grow.
- Travel support for representing INCOSE at external conference (IEEE, PMI, ...):  
This activity will clearly impact our alliance objective through direct exchanges with External Organisations (IEEE, PMI, OMG, ...)
- Support for translation of documents:  
This activity will allow a better dissemination of INCOSE products within the sector by translation from English to other languages. SME and VSE are particularly targeted but also non-English spoken countries, a huge population in EMEA sector  
In 2018 are planned the translation of the SE Handbook in Spanish and Russian and the Guide for Writing Requirements in Russian
- Travel support to present an approved paper at a regional event (3 for EMEA sector):  
It will encourage participation in EMEA sectors from different countries, particularly for those who are not supporting by a company or those belonging to a small/emerging Chapter
- Travel support for up to 2 student members to attend IS/IW:

To encourage student participation at INCOSE global event, and therefore encourage student membership and development of student division in various chapters

- Regional (Sector) conference support through sponsorship or travel support:  
To support organisation or regional or sector level events, by either direct sponsorship or participation to travel
- Travel Support for Leadership Program (up to 5 candidates):  
To encourage participation of sector candidates to the Leadership Program
- Travel support for EMEA Events:  
To support a good level of participation from Chapters for EMEA events, in particular the EMEASEC 2018 in Nov 2018 (Berlin, Germany)
- Chapter due risk:  
To support growth without the incurrence of additional services costs
- Good Neighbour Award:  
In recognition of Chapters contributing toward the well-being of other Chapters in pursuance of the interests of INCOSE as a whole

This budget will therefore enable direct support to:

- Growth strategic objective by:
  - Expanding the mature Chapters:
    - Diversification of domains, new CAB/AC members
    - Encouragement of VSE
    - Local Chapters / Groups
  - Entering new Chapters:
    - Tunisia,
    - Portugal
- Active participation to IW 2018 in Jacksonville
- Active participation to IS 2018 in Washington DC
- Active participation to EMEASEC 2018 in Berlin, Germany in Nov 2018
- Support EMEA participation to WGs initiated/co-lead by EMEA: Ontology, PM-SE integration, Human System Integration, Architecture, Product Line
- Encourage creation of new WG: Configuration Management, V&V , PLM for SE
- Promotion of Chapter Products
- Translations of documents: SE Handbook in Spanish and Russian, Guide for Writing Req in Russian

Following the successful 2<sup>nd</sup> EMEA Workshop in Mannheim (Germany) on 19-20 Sep 2017 after the first done in 2015 with the AFIS-EMEA Workshop in Paris, EMEA Sector will pursue

with this kind of event on a bi-annual periodicity cycle. Therefore, the 3<sup>rd</sup> EMEA Workshop will be planned in 2019 during Q4-2019. 2 chapters are already candidate to host it: Netherland and Italy.

It is now agreed to have this EMEA workshop recurring, happening every 2 years (not the year of EMEASEC) and to have a rotation within EMEA chapters in order to encourage a maximum of members to attend and cross the network.

#### 4.4.3 Asia-Oceania Sector

In 2018 the Asia-Oceania sector will look to focus on building greater collaboration across the Chapters. In 2017 this was achieved through the sharing of events calendars, supporting the marketing of our events across the Sector and sharing our newsletters, *just to name a few*. Over the next 12 months the Sector will expand its collaboration to run “virtual tours” where presentations will be broadcasted to multiple sites in the sector, allowing participation over the network to occur. A one-day event may have presentations in India, Australia, Singapore and China for example with attendees participating locally and remotely during the day. Of course, there will be some work to do, but the plan is to progressively build up to this goal.

Continuing on from collaboration, the Asia-Oceania Sector will support the regional CDS&M 2018 conference in Singapore as our main regional event for the year. In parallel planning will for the next Asia-Oceania SE Conference (AOSEC 2019), the location yet to be decided. To do this the Sector Events Committee will be strengthened with the addition of resources from the Chapter where AOSEC 2019 will be held.

At the Chapter level the focus will remain on growth, stabilisation and value offerings to all members as follows –

- Growth – Chapters with support from the Sector level will strive to increase membership through such activities as student competitions, hosting regular evening events, hosting annual conferences and workshops, co-hosting events with other technical societies and organisations, and meeting with industry and domain leaders.
- Stabilisation – Consistency in governance of each Chapter will be improved.
- Value Offerings – Chapters will endeavour to provide value offerings to its members and its community. Examples of these include newsletters, shared reports on conferences, text books and meetings conducted, translation assistance as appropriate, and support to participate in conferences, workshops and Working Groups.

Finally, Asia-Oceania will continue to promote INCOSE's Certification Program and Leadership Program. Both programs are deemed essential for the advancement of INCOSE in the Sector, for the professional development of our members, and for the benefit of Systems Engineering in our communities.

#### 4.4.4 Chapter Support

Sector directors provide periodic support to individual chapters to promote excellence in chapter operations or intervene for struggling chapters. Additional support is provided to existing and start-up chapters, such as:

- Keys to Effective Chapters

- New Chapter Coordination

#### 4.4.5 Chapter Awards

Sector Directors sponsor various awards to promote excellence in chapter and membership activities. Budget is used to provide chapter awards for the chapter awards program, and past-president recognition pins.

### 4.5 Technical Operations

#### 4.5.1 Overview of Budget

The Technical Operations 2018 budget was created by a bottom-up/top-down/bottom-up process. Working Groups generated their plans to meet their objectives, prioritizing them into 4 levels. The requests were broken into an estimated allocation for each of the 9 A.D.s, plus the 2 Champions of the Objectives TechOps owns, plus the Director & Deputy Director internal initiatives. The Technical Director initially submitted the resulting total to the Treasurer and BoD for consideration before the Q4 BoD meeting. After the BoD meeting we decided to do another bottom-up budget in order to establish the line item metadata needed for cross-organizational consistency checks. A decision was made repeat what we did last year, managing the budget assuming we will only spend 70%, doing monthly reviews to reallocate as needed and assure we are on target to not spend more than the total submitted at the Q4 BoD. Note, the budget numbers cited below are about 70% of what the A.D.s asked for to complete their priority 1 & 2 tasks.

#### 4.5.2 Analytic Enabler Working Groups

Led by Assistant Director for Analytic Enablers

Analytic Enablers are those WGs that address the SHE v4 crosscutting and Specialty Engineering activities. Also, those WGs that focus on the analytic capabilities, required for good Systems Engineering, can be found in this grouping. Examples of WGs in this grouping are: Decision Analysis, Competency and Complex Systems.

To support these goals 2018 funding is planned for these tasks:

- 1) Product Lines WG Outreach
- 2) Product Lines WG publication of work product
- 3) SoS WG Printing of SoS Primer
- 4) Publication of the Competency Framework 1.0
- 5) Systems Analysis Guidelines & Methods for the Practitioner for SEBoK
- 6) Promotional Material for all 13 WG

#### 4.5.3 Application Domain Working Groups

Led by Assistant Director for Application Domains

The Domain Specific Working Groups are the working groups that tailor and develop knowledge from/for the Process Enablers, Analytic Enablers and Transformational Enablers, to the domain specific needs and the application. Examples of related WGs are: Transportation, Oil & Gas, Defense Systems and Critical Infrastructure Protection & Recovery.

To support these goals 2018 funding is planned for these tasks:

- 1) Antiterrorism promotional material & meetings
- 2) Automotive promotional material
- 3) Defense Systems
- 4) GEOSS
- 5) HWG SE in Healthcare 4th Annual conference
- 6) Outreach to potential KOLs and potential Customer Advisory Board members
- 7) Training/Education/Certification Summit
- 8) Outreach meetings...testing the promotional materials
- 9) SSIH Modelling conference invited speaker
- 10) INCOSE invited speaker travel to strategic Europe conferences (Gary/Bridget)
- 11) INCOSE invited speaker travel to strategic US conferences (Chris)
- 12) INCOSE invited speaker travel to strategic academic conferences (Bo)
- 13) Development of new infrastructure-related SE Tri folds
- 14) Reprints of Year 2015 infrastructure-related SE Tri folds
- 15) NETLIPSE Collaboration Meetings
- 16) Outreach to Construction Institute and Attend Infrastructure related conferences to promote SE
- 17) API Engagement Travel to DC
- 18) WG & Conference Advertising
- 19) TGCC & O&G WG Conference
- 20) EMEA Regional O&G Conference
- 21) DOORS work for API Standards Subgroup 3
- 22) RDM Guide Publication
- 23) EnergyTech2018 Conf Support
- 24) Modelling initiative (cont) for Microgrid Ref. Model
- 25) Video production of high-profile panel
- 26) IEEE Aerospace Conference
- 27) Conference on Systems Engineering Research

#### **4.5.4 Process Enabler Working Groups**

Led by Assistant Director for Process Enablers

Process Enablers are the WGs that address the topics and processes as defined in the SE Handbook and ISO/IEC/IEEE 15288:2015. Among others, the Process Enablers consists of WGs like Architecture, Measurement, Risk Management and Requirements.

To support these goals 2018 funding is planned for these tasks:

- 1) FEPO Summit
- 2) FEPO Plenary
- 3) WG Meetings & promotional material for all 7 WG
- 4) Review 16085 WDs with members at Regionals
- 5) Conference registrations (not IW or IS)
- 6) Exhibit displays for Risk Mgmt. WG / ISO 16085
- 7) Risk Mgmt. Software Evaluation

#### **4.5.5 Transformational Enabler Working Groups**

Led by Assistant Director for Transformation

Transformational Enablers are leading the way to future developments of Systems Engineering. Examples of Initiatives and WGs are: MBSE Patterns, Model-Based Conceptual Design, Process Improvement and the MBSE Initiative.

To support these goals 2018 funding is planned for these tasks:

- 1) PDES Inc. SE Workshop
- 2) Printed and online material to promote Ontologies in SE
- 3) Participation in Ontology Meetings
- 4) Ontology Website support
- 5) Ontologies Survey support
- 6) IW Comps for ISSS members
- 7) IS Comps for ISSS members
- 8) IW Appreciation Dinner for ISSS
- 9) ISSS Conference
- 10) NSF Workshop
- 11) Sys Principles Workshop
- 12) IFSR Conversation
- 13) CSER Conference
- 14) IEEE SysCon
- 15) GLRC12 attendance
- 16) European Conference
- 17) EuroAsiaSPI 2018
- 18) IEEE SysCon
- 19) European Conference
- 20) EuroAsiaSPI 2018
- 21) Collaboration with ASME V&V of Models
- 22) IW MBSE Workshop
- 23) IS Model Based Workshop
- 24) Challenge and Activity Teams
- 25) IEEE International Systems Conference
- 26) Offsite preparation for IS2018

#### **4.5.6 Standards Initiative**

Led by Assistant Director for Standards

The Standards Initiatives group is working to advance and harmonize systems engineering standards used worldwide. INCOSE liaises with existing standards developing organizations, contributing to the development of standards and technical reports and participating in the planning for new work items related to systems engineering standards.

To support these goals 2018 funding is planned for these tasks:

- 1) SC7 WG07 Plenary - Delhi, India
- 2) SC41 (IoT) Plenary - Berlin, Germany
- 3) JTC1 WG11 (Smart City) Plenary - assume Europe
- 4) SC7 WG07 Interim - Unknown
- 5) SC41 (IoT) Interim, - TBD, Japan
- 6) JTC1 WG11 (Smart City) Interim - assume China

- 7) ISO/IEC JTC1 SC07 WG04 Tools Co-editor
- 8) ISO/IEC JTC1 SC07 WG07 - System of Sysems
- 9) ISO/IEC JTC1 SC7 WG07 - Convener, Requirements Editor
- 10) ISO/IEC JTC1 SC7 WG07 - Revise 16085 (Risk Co-editor)
- 11) ISO/IEC JTC1 SC7 WG07 - Revise 16085 (Risk Co-editor)
- 12) ISO/IEC JTC1 SC7 WG07 - 24748 -- Sys. Eng. Management Editor
- 13) ISO/IEC JTC1 SC7 WG07 - 24748 -- Systems Integration Editor
- 14) ISO/IEC JTC1 SC07 WG10 - 15504 Liaison
- 15) ISO/IEC JTC1 SC07 WG20 - Certification Editor
- 16) ISO/IEC JTC1 SC7 WG24 - LifeCycle for Very Small Enterprises/HoD/Secretary/Editor Part 1
- 17) ISO/IEC JTC1 SC07 WG42 - Architecture Editor
- 18) ISO/IEC JTC1 - Internet of Things
- 19) ISO/IEC JTC1 SC27 - IT Security Techniques
- 20) ISO TC184 SC4 Industrial Data
- 21) ISO TC184 SC5 Object Process Methodology (OPM)
- 22) UML & OMG Support

#### **4.5.7 Internal Operations**

Led by Assistant Director for Internal Operations

The AD for TechOps Internal Operations has the goal to keep our business practices, processes & policies up to date and synchronized with the rest of INCOSE.

To support these goals 2018 funding is planned for these tasks:

- 1) Offsite meetings
- 2) Tech writing support

#### **4.5.8 Technical Review**

Led by Associate Director for Technical Reviews

The AD for Technical Review has the goal to assure fair and tailored reviews of potential INCOSE products in order assure the expected quality levels, especially those related to the symposia proceedings.

To support these goals 2018 funding is planned for these tasks:

- 1) Easychair License
- 2) IS Language Support
- 3) Plagiarism Checker

#### **4.5.9 Technical Events**

Led by the Assistant Director for Technical Events

The AD for Technical Events has the charter to liaise with the Events Committee, bringing TechOps resources to help and assuring TechOp objectives are represented in the IW & IS yearly events. A new investment will be made to help underwrite topic specific conferences that the WG want to offer.

To support these goals 2018 funding is planned for these tasks:



- 1) Underwriting WG conferences with some return
- 2) Investing in volunteer efficiencies as the opportunities present

#### **4.5.10 WG Intergration**

Led by the AD for WG Integration

The AD for WG Integration has the charter to liaise between WG within TechOps and within Chapters in order to assure transparent and efficient use of our volunteer work force.

To support these goals 2018 funding is planned for these tasks:

- 1) Travel to sectors if needed
- 2) Investing in volunteer efficiencies as the opportunities present

#### **4.5.11 New WG Investments**

Led by the Deputy Technical Director

Some 2018 funding has been reserved for tasks that will help to develop new working groups as well as respond to emerging opportunities.

To support these goals 2018 funding is planned for these tasks:

1. Offsite meetings
2. WG promotional materials & events

#### **4.5.12 Objective - Transformation of SE to a Model-Based Discipline**

See section 3.

#### **4.5.13 Objective – Impactful Products**

See section 3.

#### **4.5.14 TechOps Development & Maintenance**

Led by the Technical Director

Some 2018 funding has been reserved for tasks that will help to develop and maintain a healthy TechOps volunteer organization as well as respond to emerging opportunities.

To support these goals 2018 funding is planned for these tasks:

1. Making our 80+ TechOps web pages consistent & up to date
2. Investing in volunteer efficiencies as the opportunities present

### **4.6 Academic Program**

#### **4.6.1 Education**

Academic Matters will continue to sponsor Academic Forum workshops outside the IW and IS, producing tangible products and influence thinking by academics and others. These forums will likely be centred around the INCOSE Education Objective to bring systems thinking and systems engineering into the education of all engineers. The American Society of Engineering Education (ASEE) will co-sponsor some of these events. New outreach activities within the International Federation of Engineering Education Societies (IFEES) will

also be initiated. Other workshop topics such as the integration of emerging areas within a systems engineering education are also under consideration. The aim is to hold Academic Forum workshops in all three INCOSE Sectors.

#### **4.6.2 Academic Research**

INCOSE is a co-sponsor of the Conference on Systems Engineering Research (CSER). Also, INCOSE will sponsor one or two research-oriented Academic Forums in 2018, as a continuation of a recent series of workshops on "Future Directions of Systems Engineering Research." Work on integration and consolidation of the outcomes of the last workshop held in October 2017 will continue and be reported on at the IW, CSER, and the IS.

INCOSE may significantly expand its focus to facilitate and support the development of the theoretical foundations of Systems Engineering, an effort that will help keep INCOSE at the forefront of systems engineering research.

#### **4.6.3 Accreditation**

As a member of ABET, INCOSE supports accreditation visits and seeks to influence their direction through our membership on their Board. The Assistant Director for Accreditation leads these activities. Labor activities associated with ABET are volunteer. In 2018, a primary activity to raise INCOSE visibility within ABET will be concerted outreach at ABET events including the ABET Annual Conference. Updates to ABET criteria are being considered that will integrate greater demand for all engineering students to understand the fundamentals of systems engineering. INCOSE will encourage the adoption of those criteria changes and support their implementation at universities in the US and possibly worldwide. In addition, INCOSE is working to participate and contribute in the development of ABET program criteria for systems engineering and for cybersecurity engineering. The Assistant Director for Accreditation will seek to raise the visibility of INCOSE among other accreditation organizations and universities as well.

#### **4.6.4 Youth Outreach**

The primary INCOSE youth outreach is support for the INTEL International Science and Engineering Fair. INCOSE supports a "Best Use of Systems Engineering" award as well as judges for the fair.

#### **4.6.5 Student Divisions**

Student divisions have been growing well over the past several years. The Assistant Director will work to strengthen the ties between local INCOSE chapters and student divisions that are housed at nearby universities.

#### **4.6.6 Systems Engineering Honor Society**

Sigma Theta Mu, the new Honor Society for college students in systems-related majors has started for universities in the US. A number of new chapters are expected to be added throughout 2018.

#### **4.6.7 Faculty Support and Development**

A new initiative aimed to provide resources to new systems engineering faculty will be launched. The "New Faculty Colloquium" will be designed to provide new faculty with information to successfully navigate the challenges of an academic career. The event will include presentations from seasoned academics on issues such as: effective teaching,

research and publication, securing grants, university and professional service, tenure, mentorship, establishing collaborations, ethics and difficult situations, and work-life balance.

#### **4.6.8 BKCASE Initiative**

This includes stewardship of the Systems Engineering Body of Knowledge (SEBoK) and Graduate Reference Curriculum for Systems Engineering (GRCSE).

### **4.7 Systems Engineering Certification**

The INCOSE SE Certification Program draws individuals in to the organization and promotes INCOSE as the global source of knowledge about Systems Engineering. It offers three levels of recognition for Systems Engineering Professionals: Associate Systems Engineering Professional (ASEP), Certified Systems Engineering Professional (CSEP), and Expert Systems Engineering Professional (ESEP). New certification recipients at all levels are expected to participate in INCOSE activities as part of their ongoing, individual professional development.

The Certification Program will expand the global interest in INCOSE and its events through offering the Certification Knowledge Exam at all major INCOSE events. With the INCOSE Systems Engineering Handbook 4<sup>th</sup> Edition as the body of knowledge for the exam, and with the INCOSE competency framework as the basis for the SE experience areas in the certification application forms for CSEP and ESEP, participants in the Certification Program will become knowledgeable about INCOSE's perspective on systems engineering.

In 2018, the INCOSE Certification Program will be working with universities and government agencies worldwide to increase both the supply of and demand for SEPs. Students will be encouraged to get their ASEP through the combination of waived exam fees and reduced student membership rates. Government offices will be encouraged to either provide financial support for their employees or members or to note that INCOSE Certification is a desired characteristic for contractors.

### **4.8 Information Technology**

The goal of the IT function is to help INCOSE be recognized as the definitive source for the best information about systems engineering, its practice and practitioners by making that information available and accessible, both to members and prospective members. Maintaining the requisite impactful nature of this great resource demands immediacy and currency that continues to prove challenging to achieve and sustain.

During the 2018 AOP, web site upgrades implemented in 2017 will continue to be evolved. to maximize the value of this resource for all members and prospective members. Additional tools and capabilities will be made available to include improved sites and resources the chapters and groups for collaboration, surveys and other tools. Knowledge about and understanding of these capabilities needs to be at the fingertips of any member, and reachable through effective and comprehensive online facilities. More work is required to improve the information, help and background expertise available to move forward.

The IT Team continues working with the three primary vendors to improve the new platform for web site, membership administration and collaboration, addressing issues and adding improved and new functionality. The member management continues to present challenges, and is now the focus of a requirements activity and task team. This will need to be fully addressed at the expiration of the current contract in 2018.

Specific action is required to respond to Sanctions compliance and new data privacy laws, and these topics will require some investment.

Hosting and vendor services have exhibited some price increases, and we anticipate more as we continue to use these resources, and build out the structure and content. I continue to monitor these closely.

Once more – this is a journey, and will take time to reach a level to satisfy a majority of users and stakeholders.

An INCOSE IT strategic plan needs to be developed this year, to maximize the accessibility and usability of this resource, ensure applicability to the ever-evolving needs of the consumers of this material, and the essential growth over the duration of our next strategic period. It is also anticipated that assistant director roles will be defined and filled during the period.

#### **4.9 Marketing and Communications**

In 2018, MarCom will focus on building consistent messaging and branding for INCOSE Central. Continuation of branding efforts with the website, print, and e-materials will accelerate in FY18 because a contractor resources have been identified to build the website, create content and design branded materials. Expenses to increase awareness and exposure include:

- Booth for IS2018
- Video production for YouTube channel
- Content writing for website, brochures, and other marketing materials
- Non-INCOSE tradeshows to promote products, certification, and CAB/AC
- Posting press releases on paid PR sites to increase visibility
- Build standard templates for use by membership that provide consistent messaging and branding

#### **4.10 Central Admin**

INCOSE Administration Office provides salaried staff to support the execution of day-to-day operations of the organization: General Administration and Member Services for both Individual and CAB members as well as Sectors and Chapters.

Admin supports the Board of Directors, Technical Operations, Corporate Advisory Board, Academic Matters, Certification, MarCom, Outreach, CIO, Publications and various committees: Events, Nominations & Elections, Budgeting and Planning, Ways & Means, Honors and Awards, Fellows, IOB, Technical Review, and IT.

Admin will play a critical role in the implementation process of the strategic objectives and are the paid staff assisting with the communication, coordination, etc. through support of:

- Scheduled Meetings/Major Events
- INCOSE Online Store
- Virtual Meeting / Conference Capability
- Marketing
- Certification Process Support
- IT Infrastructure Support
- Membership Database Maintenance
- Working Group Support
- Chapter, Individual and Corporate Member Support

#### **4.11 Publications Office**

The Publications Office is led by the Associate Director for Publications, supported by a staff Publications Office manager. Some of the primary areas of responsibility for the Publications Office includes the following:

INCOSE Publications:

- INCOSE Systems Engineering Handbook and its translations
- INSIGHT, The INCOSE Practitioner's Magazine
- Systems Engineering, the journal of INCOSE
- Proceedings from the INCOSE International Symposium and selected regional conferences
- Journal of Enterprise Transformation
- Working Group products (e.g., Guide for Writing Requirement

While the Publications Office has a nominal relationship with the Journal of Enterprise Transformation, the relationship with Wiley is primary all other publications. INCOSE derives revenue through its contract with Wiley including several advertising programs within the Wiley framework: System Engineering, INSIGHT, and direct e-mail (known as eBlasts). The Publications Office monitors and reports on revenue derived through publications.

Goals for 2018:

- Obtain rights to Chapter and member products for sale.
- Continue to develop relationship with Wiley to maximize exposure and sales of INCOSE existing and new products.
- Improve the impact factor of SE Journal
- Explore relationships with other publishers/distributors for other INCOSE products, as appropriate, or other areas of publication that could provide benefit for INCOSE.
- Work with other INCOSE functions to define/update publication related guidelines.
- Begin work on a gap analysis to increase the portfolio of publications relative to competencies and SE functions.

#### **4.12 Institute for Technical Leadership**

##### **4.12.1 History**

The INCOSE Institute for Technical Leadership (aka TLI) was established in 2014 as a presidential initiative and approved by the Board of Directors in June of that year. The purpose of the initiative was to create a development program that would produce a growing pool of leaders for INCOSE to draw from in filling leadership positions, to increase the leadership capabilities of INCOSE members, and to enhance INCOSE's international reputation for SE leadership.

An ad hoc committee of three university professors with extensive experience in developing and delivering technical leadership programs was formed to direct the effort. A first cohort was launched at IS 2015 in Seattle and subsequent cohorts were launched at the IS in 2016 and 2017. Twenty-one members of the first cohort successfully completed a two-year technical leadership development program and were inducted into full membership in the Institute at IS 2017 in Adelaide. This marked the conclusion of what has come to be regarded as the proof of concept phase of the initiative.

#### **4.12.2 Vision**

The vision that emerged during the proof of concept phase is for the Institute to be an organization comprised of its members, rather than some fixed structure. Members are committed to: communicate INCOSE's vision of technical leadership, both internally and externally; provide technical leadership training to chapters, sectors, working groups and others, as requested; and develop, manage and improve resources to support these activities. Eventually, they will assume full responsibility for selecting, training and developing new TLI members, for budgeting and managing its finances, and for reporting on activities to the Board and others. At the same time, the role of the Coaches Committee will evolve into that of an Advisory Board.

**Objectives for 2018:**

Given the successful completion of the training program for Cohort 1 in 2017 and their induction into full membership in the TLI, the coaches' primary objectives for 2018 are:

- Facilitate transition to the member-led model for Cohort 1
- Continue to support the development of Cohorts 2 and 3
- Improve the recruiting process for Cohort 4
- Continue to explore ways to make the TLI financially self-sustaining

## **Appendix A: INCOSE Memorandums of Understanding**

INCOSE's Memorandums of Understanding (MOU) are managed by the Director for Outreach, and are held on file in Connect at the following link:

<https://connect.incose.org/Organization/BOD/Pages/home.aspx?RootFolder=%2FOrganization%2FBOD%2FINCOSE%20Shared%20Documents%2FMemoranda%20of%20Agreements%20%28MOA%20and%20MOUs%29&FolderCTID=0x0120008803DF521D690A44A94800173BDA76DF&View={82EB27E9-2C56-4DE7-98AB-F77A9DAB8192}>

Attached is a summary list of the current active MOUs,

  
  
Summary list of  
active INCOSE MOUs

## **Appendix B: INCOSE Support Contracts**

All contracts referred to in this AOP are maintained in the INCOSE Admin office and are held in the INCOSE Connect Contracts folder under the Board of Directors. Please contact Christine Kowalski: [christine.kowalski@incose.org](mailto:christine.kowalski@incose.org) for more information.

### **B.1 Contracts reporting directly to the President-Elect**

#### **B.1.1 Administrative Support**

- Contractor: Universal Management Services

The contract with UMS provides administrative support, member services and IT support. Services delivered by UMS. This contract also allows for additional tasks to be performed at agreed rates.

#### **B.1.2 Certification Program Manager**

- Contractor: V1 Decisions

A contract has been put in place with V1 Decisions to provide a Certification Program Manager to support the INCOSE Certification program.

### **B.2 Contracts reporting to the President-Elect in conjunction with the Publications Office**

#### **B.2.1 INSIGHT Practitioners Magazine Chief Editor**

- Contractor: William Miller dba WDM Systems

INCOSE has a two-year contract with WDM Systems for editorial support for the INSIGHT Practitioners Magazine. Contract renewed in 2017.

#### **B.2.2 INSIGHT Practitioners Magazine Sub Editor**

- Contractor: Lisa Hoverman

INCOSE has a contract with Lisa Hoverman for editorial support for the INSIGHT Practitioner's Magazine

#### **B.2.3 INCOSE Typesetter / Graphics**

- Contractor: Kerry Quinlan / Chuck Eng

Contract is for typesetting and graphics as needed for INCOSE publications. Also coordinates with MARCOM Director.

#### **B.2.4 Systems Engineering, the Journal of INCOSE**

- Contractor: Wiley & Sons Inc

A contract was let in 1998 for the publication of the SE Journal and amended in 2002. A renegotiation was managed in 2012 to a much lower contract value and expanded to provide a royalty sharing arrangement which now includes SE Journal, INSIGHT and INCOSE Online Proceedings Library in 2014.

#### **B.2.5 Journal of Enterprise Transformation**

- Contractor: Taylor & Francis

A contract was let in 2009 with Taylor & Francis for the publication of the Journal of Enterprise Transformation. This is a joint publication with the Institute of Industrial Engineers.

### **B.3 Contracts reporting to the Treasurer**

#### **B.3.1 International Workshop 2018**

- Contractor: KMD Partners Events Management

INCOSE contracts annually for administrative support for the annual International Workshop.

#### **B.3.2 International Symposium 2018**

- Contractor 1: KMD Partners Events Management



Each year, INCOSE awards contracts for the support of the annual International Symposium. The support tasks have been carefully identified and allocated.

#### **B.3.3 International Symposium 2019 Site Selection**

- Contractor: KMD Partners Events Management

Each year, INCOSE awards contracts for the site selection of the future annual International Workshops. The contract includes the identification and assessment of candidate host sites for the workshop.

#### **B.3.4 International Workshop 2020 Site Selection**

- Contractor: KMD Partners Events Management

Each year, INCOSE awards contracts for the site selection of the future annual International Workshops. The contract includes the identification and assessment of candidate host sites for the workshop.

### **B.4 Contracts reporting to the Certification Program Manager**

#### **B.4.1 Certification Testing Services**

- Contractor: Prometric

Contract is to provide certification testing at sites around the world.

### **B.5 Contracts reporting to the CIO**

#### **B.5.1 IT Support**

- Contractor: CGTS (server support)

#### **B.5.2 Web Hosting Services**

- Contractor: CGTS for SharePoint License and Server

#### **B.5.3 Email Services**

- Contractor: IceWarp/Mail Channels

#### **B.5.4 Web Site Development/Platforms**

- Contractor: Vanguard (Sitefinity)

#### **B.5.5 SharePoint Services (INCOSE Store and Connect)**

- Contractor: Invenio

#### **B.5.6 Association Membership System**

- Contractor: MemberSuite

### **B.6 Contracts reporting to the INCOSE Admin**

#### **B.6.1 GlobalMeet Service**

- Contractor: PGI (Teamings)

GlobalMeet and Webex accounts are assigned by Admin upon request by various INCOSE group leaders (chapters, working groups, committees, board). The GlobalMeet Platform allows for 125 users on the webinar and 300 on audio. Webex Event account is for webinar use and allows 125 webex attendees. Webex small meetings is for small groups up to 25.

#### **B.6.2 Election Support Contract**

- Contractor: Votenet – Renewal of contract in 2017

INCOSE contract now includes use by all INCOSE entities and chapters.

#### **B.6.3 Insurance**

- Contractor: DMA Insurance: Directors & Officers Liability Insurance – Old Republic

- Contractor: DMA Insurance: Commercial Liability Insurance – Liberty Mutual/Ohio Security Insurance Co
- Contractor: DMA Insurance: Professional Liability Policy – Evanston Insurance Co
- Contractor: DMA Insurance: Foreign Liability Policy – AIG WorldSource/Insurance Company of the State of PA

All policies are contract year: March 2017 to March 2018 / New contract year March 2018 to March 2019. Revision to policies are being review for the new contract year.

New coverage levels and policy types are in review and will be put in place for 2018-2019. The new policies are intended to be more comprehensive to reflect the growth and global perspective on INCOSE.