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INCOSE-WMA Chapter

2011 Operating Plan

***ADDENDUM C – AMBASSADOR PLAN***

**7 April 2011**

**Revision 2.0**

**Approved By**

**Officers**

**\_\_\_\_\_\_\_**/signed/**\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_**/signed/**\_\_\_\_\_\_\_\_\_**

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\_\_\_\_\_\_\_/signed/\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_/signed/\_\_\_\_\_\_\_

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**Directors-at-Large**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Mr. Edward Ghafari Mr. Matthew Dismer**

**WMA Chapter Committee Chairpersons**

**\_\_\_/R Posadas signed for/\_\_\_ \_\_\_\_\_\_\_**/signed/**\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Programs Committee Chair Communication Committee Chair**

**Ms. Jana Richards-Taylor Mr. Chris Ritter**

**\_\_\_\_\_\_\_\_\_\_\_concur\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Membership Committee Chair**

**Ms. Kristine Hejna (non-voting)**

**Change Log**

| **Revision** | **Changes** | **Approval Date** |
| --- | --- | --- |
| 1.0 | Initial Issuance | 9 May 2010 |
| 2.0 | Update consistent with 2011 Planning cycle | 7 April 2010 (approved by vote at BOD meeting; members present and voting noted by “/signed/” on signature page) |

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**Appendices**

A – Ambassador Program Standard Operating Procedure (SOP) (TBD001)

**TBD/TBR Log**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TBD** | **TBR** | **Section/Para** | **Description** | **Date Closed** |
| 001 |  | App A | Creation of Ambassador Program Standard Operating Procedure (SOP) (by 31 Jun 11) |  |
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|  |  |  |  |  |

# Purpose of Plan

The purpose of this Ambassador Plan is to provide an overview of the intent and goals for the INCOSE-Washington Metro Area (WMA) Chapter Ambassador Program and to provide guidance for the ongoing operation of the Ambassador Program. As defined by the INCOSE organization, the Ambassador Program is inherently an outreach activity that relies significantly on effective chapter communications and a strong membership program as a means to strengthen relationships between the Chapter and the government, industry, and academic organizations that employ members of the chapter. The Ambassador Program effectively supports the INCOSE mission and goals as identified in the INCOSE-WMA Operating Plan.

## Program Scope

The Chapter Ambassador Program includes identifying volunteer points of contact within key companies/corporations, academic institutions, or other organizations (i.e. the government) that are representative of the WMA Membership base. Ideally, those companies or organizations with the largest representation within the membership are ideal first candidates for having an Ambassador point of contact (POC); however, any member volunteer who wishes to help INCOSE-WMA and facilitate a closer working relationship with his company or organization is encouraged to participate. These POCs serve as a primary conduit of information for dissemination of Chapter activities, events, etc. as an additional communication path and method other then basic chapter communications using the website or mailings (via email or other means). Additionally, they serve as a conduit back to the Chapter, representing their company or organization to inform the Chapter of activities, events, and/or other needs the sponsoring organization would like to see the Chapter promote and/or support. Thus, clearly a successfully implemented Ambassador Program can be very effective in the success of the Chapter and in increasing membership involvement and participation. The Chapter Board of Directors (BOD) also uses the Ambassador POCs to solicit help from the companies/organizations for use of facilities, sponsorship of events, or other purposes. Sometimes these companies/organizations may also be INCOSE Corporate Advisory Board (CAB) members which helps with requests such as this, but not always. However, this relationship can spawn interest by the participating companies/organizations to become CAB members which helps the Chapter operations in the Outreach Functional Area (FA), as described in the Chapter OPLAN.

## Applicable Documents

The following documents are referenced within this plan and were used in the formulation of this Plan.

| **Doc Title** | **Revision** | **Date** | **Source Ref** |
| --- | --- | --- | --- |
| Keys to Effective Chapters Including Procedures for Awards and Recognition, Edition for 2010 | 1.3 | 31 March 2010 | INCOSE connect site – Chapter publications |
| INCOSE-WMA Strategic Plan | 1.0 | 7 Apr 2011 | INCOSE-WMA website – Chapter Documents |
| INCOSE-WMA Operating Plan 2011 | 1.0 | 7 Apr 2011 | INCOSE-WMA Connect website – Chapter Documents |
| INCOSE-WMA Ambassador Plan | 1.0 | 5 May 2010 | INCOSE-WMA Connect website – Chapter Documents |
| INCOSE-WMA Bylaws | 29 Apr 2009 | Apr 2009 | INCOSE-WMA Connect website – Chapter Documents |
| INCOSE-WMA Constitution | 29 Apr 2009 | Apr 2009 | INCOSE-WMA Connect website – Chapter Documents |

## Program Operating Context

This plan’s contents support the operation of the Ambassador Program for the 2011 INCOSE-WMA Operating year. The INCOSE-WMA Bylaws and Constitution do not specify a requirement for an Ambassador Program, but it is considered an INCOSE best practice consistent with the “Keys to Effective Chapters Including Procedures for Awards and Recognition, Edition for 2010, Version 1.3”, and is a requirement under the INCOSE Circle Awards program. Specifically,

* Section 3D:  Create and maintain an “Ambassador/Promoter” program by implementing the Ambassador/Promoter portion of the Communications Plan (see 1D-awards criteria). The award criteria goes on to specify the following additional requirements: “Enlist, train (e.g. on-line pdf) and maintain contact with organization representatives (companies, societies, schools, etc) whose role is to promote INCOSE by personal contact and distribution of Chapter announcements in their organization. Formally evaluate progress at least once after initial plan.”
* Points are accrued as follows (max points=500):  
  1) 50 pts per organization or society  
  2) 50 pts max for one overall progress evaluation
* To achieve full points the Chapter must provide:

1) List of Ambassadors/Promoters and their organizations,  
2) Copy of Ambassador/Promoter training/ orientation materials,  
3) List of those trained,

4) Copies of communications to Ambassadors/Promoters,  
5) Some indication of feedback from Ambassadors'/Promoter's promotion activities, and

6) Report or minutes of meeting where the Ambassador/Promoter effectiveness was evaluated.

It should be noted that INCOSE-WMA formally initiated an Ambassador Program in the second quarter of 2010 (Version 1.0 of Ambassador Program Plan is noted in Section 1.2). However, the 2010 requirements were not as specific as the current requirements, so that plan and the program did not fully address the current 2011 Circle Award criteria. It is the goal of the INCOSE-WMA BOD to expand the scope of the former Ambassador Program in this operating year to address most if not all of the point requirements.

## Document Organization and Configuration Control

This section identifies the Ambassador Program Plan organization and content. The plan is a stand-alone Addendum of the Chapter OPLAN, which itself is a product of the Chapter Leadership. Primary responsibility for the generation of this plan lay with the Ambassador Program Lead, identified in the Section 2.0 of the OPLAN as Mr. Steve Mosier. Approval of the plan will be by a Chapter BOD vote, and once approved, the change log will reflect the approval date and the final baselined Ambassador Program Plan will be posted to the INCOSE organization Connect INCOSE-WMA Chapter website. Copies will be uploaded to the appropriate INCOSE organization Connect Circle Awards folders, and to the Chapter website.

# Ambassador Program Roles and Responsibilities

The WMA BOD will designate a Board Member or other Chapter member as the Chairperson of the Ambassador Program; this person is appointed by the President to administer and manage the program effort. The Chapter President has oversight responsibility for the Ambassador Program, and the Vice-President/President-elect monitors adherence to Ambassador Plan requirements consistent with the Circle Awards criteria to ensure achievement of maximum point value for the Chapter.

The BOD members will provide assistance to the Ambassador Program Chairperson and Ambassadors as necessary. For example, the Membership Committee Chairperson will coordinate on member data (e.g., largest companies/organizations represented), and share member survey results. The Communications Committee Chairperson will provide website space (and guidance for upload of data/use of website) for the Ambassador Program to exchange relevant data and post Ambassador POC information. Additionally, he will help with administration of mailing lists. The Programs Committee Chairperson and Tutorials Lead will share the speaker bio and abstract data with the Ambassador Program Lead at the same time it is pushed to Communications Committee Lead for further dissemination to Ambassador Program POCs. Other interactions will be detailed in the standard operating procedure (SOP) to be developed to support this plan.

## Ambassador Program-specific roles and responsibilities

As noted, their will be an **Ambassador Program Lead** to manage, administer and execute the effort: Additional responsibilities will include:

* Generation/update of the Ambassador Program Plan; presenting plan to BOD and obtaining approval.
* Development of Ambassador Program SOP and Training Materials.
* Maintenance of the Ambassador Program Roster/mailing list.
* Maintaining Ambassador Program data on Chapter website, or identifying designee to support.
* Recruitment of Ambassador Program POCs.
* Development of Ambassador Program effectiveness measures, and metrics collection; and
* Request for support from BOD members, as required.

The Program would be nothing without having **Ambassadors**. The role of the Ambassadors is to serve as liaison from the INCOSE-WMA chapter to their company or organization on behalf of the Chapter members who are employees or members of the organizations. This includes:

* Publicizing the Chapter events and opportunities to participate/volunteer to colleagues through whatever mechanisms can be employed (e.g. internal company/organization web sites, flyers, broadcast messages, brown bags, etc.)
* Serving as a point of contact for INCOSE support requests (e.g., soliciting corporate or organization facilities for Chapter events)
* Serving as a conduit for information on INCOSE Corporate Advisory Board (CAB) membership to company/organization’s management chain, especially if not already a CAB member (INCOSE website provides a list of the current CAB membership, as well as requirements to become a CAB member); and notifying the BOD of interest for follow-up (relates to Circle Award criteria 6F).
* Soliciting colleagues for chapter meeting presentations or tutorials.
* Serving as a conduit to solicit (on an annual basis) input from the sponsoring company/organization on how the INCOSE-WMA can more effectively support their Systems Engineering education, training and knowledge needs; and
* Supporting the Ambassador Program Lead in the management, administration and execution of the program.

## 2011 Ambassador Operating Plan

The following goals have been identified for the 2011 operating year.

2011 Goals:

* Update and approve Revision 2.0 of the Ambassador Plan to meet awards deadline of April 12.
* Develop Ambassador Plan Standard Operating Procedure (SOP) as an Appendix to this Plan and associated Training Materials before June 31, 2011.
* Review current INCOSE-WMA member roster, and results of Chapter membership survey and target 5 companies for new Ambassadors; present recommendations in an email to BOD by June 31, 2011.
* Prepare a recurring announcement – call for Ambassador Program volunteers to run in every Chapter Newsletter.
* Conduct a kick-off meeting with Ambassadors, not later than June 30th 2010; provide recurring training, as required.
* Develop measures of program effectiveness and present to BOD for concurrence with goal to evaluate measures/collect metrics sometime before the end of the CY; present results at last BOD meeting of year or initial meeting of CY2012 to aid in next year planning.
* Request President send letters of appreciation to Ambassador Program POC volunteers to their corporate/organizational supervisors NLT November 2011, and highlight this activity in the November Chapter Newsletter.
* Recognize Ambassadors at INCOSE-WMA Holiday Party in December 2011.

# Ambassador Roster

The current slate of INCOSE-WMA Ambassadors is provided in the below table. This will change throughout the year and the most current roster will be maintained by the Ambassador Program Lead, and posted to the Chapter website.

| First Name | Last Name | E-mail Address | Company/Organization |
| --- | --- | --- | --- |
| DeWitt | Latimer | [dlatimer@ieee.org](mailto:dlatimer@ieee.org) | IEEE |
| Edwin | Butterworth | [edwin.butterworth.ctr@osd.mil](mailto:edwin.butterworth.ctr@osd.mil) | Office of Secy of Defense (OSD) |
| Karen | Kelly | [karen.s.kelly@saic.com](mailto:karen.s.kelly@saic.com) | SAIC |
| Kathryn | Laskey | [klaskey@gmu.edu](mailto:klaskey@gmu.edu) | George Mason University – Systems Engineering Program |
| Robert | Tamaro | [robert.w.tamaro@lmco.com](mailto:robert.w.tamaro@lmco.com) | Lockheed Martin |
| Rosie | Posadas | [eposadas@mitre.org](mailto:eposadas@mitre.org) | MITRE |
| Saumya | Sanyal | [ssanyal@deloitte.com](mailto:ssanyal@deloitte.com) | Deloitte Consulting |
| Steve | Mosier | [Steve.mosier@gmail.com](mailto:Steve.mosier@gmail.com) | MITRE – Ambassador Program Lead |
| Eva | Malagon | [Malagon\_eva@bah.com](mailto:Malagon_eva@bah.com) | Booz Allen Hamilton |
| Ruby | Ramires | [RamiresMorales\_Ruby@bah.com](mailto:RamiresMorales_Ruby@bah.com) | Booz Allen Hamilton (admin support to INCOSE President-elect John Thomas) |
| Charles | Roswell | [roswells@cox.net](mailto:roswells@cox.net) | Scitor Corporation |
| Laurie | Nasta | nastal@aol.com | Aerospace Corporation |

**Appendix A**

**Ambassador Program – Standard Operating Procedure (SOP)**

(TBD001)