INCOSE CENTRAL SURVEY PROMOTION GUIDANCE

1. **In-scope:** All surveys that INCOSE Central endorses fall within this guidance.

2. **Out of scope:** All surveys that INCOSE Sectors, Chapters, Initiatives, and Working Groups generate for just their members are out of scope for this guidance, but they are welcome to use it.

3. **Purpose:** To provide guidance to those wishing to survey the INCOSE Membership.

4. **Benefits to INCOSE:** All survey questions will be placed into a database, with results as received; this will be an accessible tool to all INCOSE members for future use.
   References are italicized below.

5. **General Information and Requirements:**
- INCOSE member data will never be released to people doing surveys.
- All surveys must be anonymous, and comply with all INCOSE Data Standards (GDPR, etc).
- For all Surveys that INCOSE Central endorses, for physical (paper form) or electronic sharing, INCOSE MarCom must receive an electronic copy of ALL survey questions (internal, external, and member-generated) to post. We recommend INCOSE leadership and WG use the Technical Operations Survey Tool.
- A proposed survey will be reviewed by MarCom, and the other appropriate Board Members of INCOSE (Academic Council, the entire Corporate Advisory Board, Technical Operations or Technical Services, or others) prior to acceptance.

6. **Benefits to INCOSE:** All survey questions will be placed into a database, with results as received; this will be an accessible tool to all INCOSE members for future use. Use of the Technical Operations Survey Tool should make this very easy.

7. **Promotion of INCOSE Leadership-Generated Surveys:**
- General Information and Requirements must be met (4)
- Limited to no more than 2 sent to every member/year in total from INCOSE Central (email)
  o A subset of members gets surveys on IW and IS on even years
- Must be an engineering and/or systems-related survey
- Posted by INCOSE Admin/MarCom on the INCOSE Systems Engineering News Feed on the Main webpage, shared on social media, and listed in eNote 1x/month during duration of the survey
- If the survey aligns with a Newsletter publication, the leader(s) may draft an article about the value of the survey and what the results will help produce to promote the survey with the actual survey, or a link to it
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8. **Promotion of INCOSE Member-Generated Surveys**
- General Information and Requirements must be met (Section 4)
- Limited to one survey from a member every 2 years
- Must be an engineering and/or systems-related survey
- Posted by INCOSE Admin/MarCom on the INCOSE Systems Engineering News Feed on the Main webpage, shared on social media by MarCom, and listed in eNote 1x/month during duration of the survey
- If the survey aligns with a Newsletter publication, the member(s) may author an article about the value of the survey and what the results will help produce to promote the survey with the actual survey, or a link to it

9. **Promotion of INCOSE Non-Member Generated Surveys**
- General Information and Requirements must be met (Section 4)
- Limited to one per non-member every 4 years
- Must be an engineering and/or systems-related survey
- Survey can only be posted by the approved non-member to the membership on public facing social media outlets (Facebook and LinkedIN Groups)
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10. **Resources for INCOSE Members for Best Practices for Creating Effective Surveys:**

When to survey members?
- 6 months after joining
- After an event (IW, IS, HSI…)
- When a member leaves

https://blog.memberclicks.com/3-crucial-moments-to-survey-your-associations-membership

https://www.surveymonkey.com/mp/survey-guidelines/

Avoiding Survey Fatigue:
https://www.n-r-c.com/how-to-avoid-survey-fatigue/

https://www.surveymonkey.com/curiosity/eliminate-survey-fatigue-fix-3-things-respondents-hate/

Other:
https://www.nbrii.com/blog/surveys-do-you-need-an-expert/