



22 August 2023

OUTREACH TEAM ROLES & RESPONSIBILITIES

The following information is a listing of the INCOSE Outreach Team's roles and responsibilities.

1. **Ambassador Role and Responsibilities** –

Ambassadors are INCOSE members knowledgeable on INCOSE matters and can represent the organization in a manner using vocabulary that is sensitive to geographical and industry domain culture. Qualification guidance includes:

- Must be an INCOSE full member,
- Must be able to demonstrate knowledge of INCOSE,
- Must be able to demonstrate knowledge of the specific area he/she will be representing INCOSE
- Must be able to demonstrate knowledge of Systems Engineering and some basic understanding of other systems related topics, and
- Have a high level of communication skills.

Ambassadors shall meet specific international growth or industrial domain objectives. They are charged to fulfill five primary objectives:

1. Understand the needs of the systems engineering community in the nominated country, geographical sector, professional association, or industrial domain. This includes identifying the profile of domain usage, key competencies and valuable insights of the target community, and opportunities for joint work products, events, and exchanges.
2. Communicate the value of INCOSE, and interpretations of its products and principles, to the target community in its own vocabulary.
3. Facilitate additional exchanges of insight between INCOSE interested parties and the target community on the views, domain challenges and usage / language of such stakeholders.
4. To support the identification of new chapters, encourage establishment of industry-oriented working groups and, where appropriate, build alliances for collaboration with INCOSE.
5. Provide a conduit to industries in which INCOSE / Systems Engineering may or may not have been utilized / represented.

2. **Relationship Manager Role and Responsibilities** –

RMs are INCOSE members knowledgeable on INCOSE and on matters common with the alliance organization. Qualification guidance includes:

- Must be an INCOSE full member,
- Must be able to demonstrate knowledge of INCOSE,
- Must be able to demonstrate knowledge of the alliance organization he/she will be liaising with,



- Must be able to demonstrate knowledge of Systems Engineering and some basic understanding of other systems related topics, and
- Have a high level of communication skills.

Relationship Managers are charged to fulfill 4 primary objectives:

1. Communicate, coordinate, and collaborate on joint activities and events with their alliance counterparts.
2. Liaise with respective INCOSE leaders on activities related to their area of responsibility.
3. Monitor, track, and assist in leading alliance agreement activities.
4. Update Outreach ARMS appropriately, per the Outreach ARMS User's Guide.

3. **Delegated Authority** –

Ambassadors have the right to represent INCOSE worldwide; interact with engineering or policy groups or associations in government, industry, and academia; and explain what INCOSE has to offer to industry, academia, governments, and individuals. Ambassadors are expected to keep informed about INCOSE bylaws, policies, and initiatives.

Relationship Managers have the right to represent INCOSE to their alliance counterpart and organization. Relationship Managers are expected to keep informed about INCOSE bylaws, policies, and initiatives.

Ambassadors and Relationship Managers cannot commit INCOSE legally or financially. They should bring such questions to the appropriate Sponsor, Sector Director, the Technical Director, the Services Director, or the Director for Outreach, for the ultimate attention of the Executive Committee.

4. **Reporting and Communications** –

The Ambassadors report to the Assistant Director Industry & Domain Outreach and will provide their status in Outreach ARMS. Ambassadors for a country, region or sector should also liaise with the relevant Chapter President if one exists, and / or to the appropriate Sector Director at a frequency determined by the respective Chapter President / Sector Director. Ambassadors to industrial domains, industry associations or professional bodies should also liaise with the relevant INCOSE Working Group Chair. As well as providing updates in Outreach ARMS, per the Outreach ARMS User's Guide.

Relationship Managers report to an Assistant Director for Outreach Professional Societies and should liaise with the relevant INCOSE leaders and working groups with respect to the joint activities in progress. As well as providing updates in Outreach ARMS, per the Outreach ARMS User's Guide.



As the potential for starting a new industry-oriented working group grows, Ambassadors shall work with the Technical Director to transfer responsibility for startup.

5. **Terms of Service** –

Ambassadors are appointed by the President, at the recommendation of the Director for Outreach, for a period of three (3) years. They can be reappointed. There is no limit in principle to the number of Ambassadors, but the number should be kept to what is necessary and manageable.

Relationship Managers are appointed by the President, at the recommendation of the Director for Outreach, for the duration of the alliance agreement (normally 3 years). They can be reappointed if the alliance agreement is reinitiated.

6. **INCOSE Leadership Roles and Responsibilities** –

Outreach Director –

The INCOSE leadership, as defined in Policies BOD-100 and BOD-101, have the responsibility to support Ambassadors and Relationship Managers. These responsibilities, nominally discharged by the Director for Outreach, include:

- To identify potential candidates within the specific sector, country, or industry / domain who have the organizational capability to establish, strengthen and broaden collaborations and Alliances, working with or on behalf of INCOSE. Approved candidates shall receive business cards and appropriate communication materials to support them in their activities.
- To facilitate access to INCOSE products, provide INCOSE promotional materials and other support (including planning and budgeting) to these candidates in support for their role and responsibilities.
- To guide Ambassadors and Relationship Managers in the external promotion of INCOSE's Products and Technical Services, including Events, Training and the Systems Engineering Professional (SEP) Certification programs; encourage mutual participation and broadening of content as appropriate.
- To provide an open and receptive audience for the Ambassadors' interpretations of the target community's needs, insights and values.
- To ensure that the rest of the INCOSE leadership are regularly updated on outreach activities, outcomes and key messages. In addition, to make recommendations about how to proceed and follow-up with contacts made in various organizations.
- Senior INCOSE Leaders will be selected as Sponsors for alliance agreements to support Relationship Managers, when necessary.



Outreach Assistant Directors and Deputy Assistant Directors –

(1) Assistant Director for Industry and Domain Outreach –

- Responsible for supporting the Outreach Director coordinating INCOSE's Outreach across geographic sector and application domain boundaries.
- In this role, they will develop and train Outreach Ambassadors with the knowledge of INCOSE overall and the benefits of being an INCOSE member.
- They will also be responsible for Outreach Event Coordination, whether the Outreach Team leads or supports planning efforts.
- For events, they will coordinate with INCOSE's Marketing & Communications for any support needed.

(2) Assistant Director for Professional Societies –

- Responsible for supporting the Outreach Director coordinating INCOSE's Outreach with professional societies and other organizations.
- In this role, they will monitor and support assigned alliances and their associated Relationship Managers (1) to ensure they understand creating & maintaining their alliance agreements and (2) ensuring their portions of Outreach ARMS is maintained.
- They will also support their relationship managers working with their alliance POCs to improve the state of best practice between the organizations through joint promotion and joint work programs.

(3) Assistant Director for Operations, Training & Support –

- Responsible for supporting the Outreach Director with general Outreach operations, Outreach Alliance Relationship Management System (ARMS) and Relationship Manager training and reviewing the Outreach budget when developed.
- In this role, they will also perform the role of the AstD for Professional Society Outreach managing some alliances.
- They will also assist the Outreach Director with Outreach Alliance Relationship Management System (ARMS) management and training, Relationship Manager training, and reviewing the Outreach budget when developed.

(4) Deputy Assistant Director General –

- Supports the Outreach Assistant Director they are assigned to, as directed.

(5) Deputy Assistant Director Event Coordination –

- Assists the AstD for Industry and Domain Outreach by tracking all external events the Outreach Team leads or supports event planning to learn all the required needs for the Outreach Team.
- For non-Outreach Events, they will be responsible be monitoring them for overall awareness.
- They will also support the AstD for Industry and Domain Outreach managing INCOSE's Outreach Ambassadors.
- They manage external events with respect to awareness across INCOSE, participation by INCOSE personnel, and support by Outreach.
- Also, responsible for training all INCOSE personnel who will be attending external events.



(6) Deputy Assistant Director Administration & Support –

- Assists the Outreach Director in all administrative and support activities, as directed.

Outreach ARMS Sponsors –

When Outreach ARMS was created in 2021, the then INCOSE Senior Leadership wanted a potential oversight / support role, if it was needed. The description for an INCOSE Sponsors is:

- A member of the INCOSE Senior Leadership the Outreach Leadership and / or the Ambassador or Relationship Manager can contact when help is needed.
- The Outreach Sponsors are the President / President-Elect, Technical Director, Services Director, Sector Directors, CIO, and AsCD DEI.