



## **MBR-100: Membership – 15 April 2021**

### **Purpose**

INCOSE is open to individuals, corporations, other business entities, governmental agencies, not-for-profit organizations, and academic institutions. The purpose of this policy is to describe the different membership fees, the collection of these fees, and the allocation of these fees to INCOSE Central and to the relevant Chapters.

### **Applicability**

This policy applies to INCOSE:

- Individual members, including Regular, Senior and Student, across all Purchasing Power Parity (PPP) bands.
- Corporate Advisory Board (CAB) members and Chapter Affiliation Sponsors (CAS).

### **Definitions**

Individual membership is categorized as Regular, Senior, and Student for purposes of the annual fees and dues structure and identification.

For the purposes of this policy, Chapters are divided into Regular Chapters, which are administered by INCOSE Central, and Memorandum Of Agreement (MOA) Chapters, which are administered by a national legal entity.

The term “Chapter Affiliation Sponsor” (CAS) refers to an organization that has a contract-based relationship with an INCOSE Chapter, as defined in CHP-101.

The term “fees” identifies funds collected by INCOSE through memberships.

The term “dues” identifies the allocation of the fees to different INCOSE internal organizational entities, in particular INCOSE Central and INCOSE Chapters, both Regular and MOA.

### **Qualifications**

Individual members may elect any membership category for which they are eligible.

Individual Membership of INCOSE shall comply with the requirements of the INCOSE Countries of Concern chart, located under the Sanctions page on the INCOSE website. These restrictions apply for both memberships administered by INCOSE central, and by its MOA Chapters.

CAB membership is based upon a set of bands which are related to the number of employees of the organization. Employees, students and faculty members of CAB organizations may be eligible for Associate membership, as detailed in CAB-100.



CAS membership is based upon a set of bands which are related to the relevant fee. Employees, students and faculty members of CAS organizations may be eligible for Associate membership, as detailed in CHP-101.

The annual Individual member fees and the membership fees for CAB membership are shown in the INCOSE Membership Price List. The annual membership fees for CAS membership are shown in the INCOSE Additional Services for Chapter Affiliations Sponsors Price List

Individual membership fees shall be reviewed periodically in accordance with policy MBR-101.

Any changes to membership fees must be approved by the INCOSE Board of Directors (BoD), and will be communicated to the INCOSE membership at least 12 months in advance of activation. In the case of MOA Chapters with specific national legislation which requires a longer notice period, they will be allowed a grace period to cover any difference between the global implementation date, and the point at which they are able to comply.

Each membership year is twelve (12) months long. For Regular, Senior, and Student members, the membership year begins upon enrollment with INCOSE and continues for twelve months, at which time it may be renewed. For CAB/CAS members, the membership year begins 01 January. New CAB/CAS members will be assessed pro-rated annual dues to align their membership renewal dates to 01 January. Proration of annual fees for new CAB/CAS members shall be monthly.

Individual members qualify for the Senior category if they meet both of the following conditions:

- They must be at least 64 years of age at the start of the membership year;
- They must have maintained their Individual membership for the five (5) membership years prior to applying for the Senior category.

Members qualify for a Student category if they are enrolled in a university or college as a student seeking a degree, not employed more than 1/4 time outside the university in which they are enrolled, and their course load is at least 3/4 of full time as defined by that university. For example, if the full-time student course load is 4 per semester, then the student must be enrolled in 3 or more courses in order to qualify for the student membership rate. Evidence is required from institution to confirm Student membership status at enrollment and renewal.

The President of INCOSE may designate residents of certain countries to be eligible for reduced annual Individual member fees for regular membership category. The reduced rate shall be based on the PPP of the per capita Gross National Income for each country based on the World Bank's World Development Indicators database. A designation is valid for one (1) membership year, and may be extended or cancelled by the President for each subsequent membership year. The country designations are reviewed at the Quarter 1 BoD meeting.



The most recent PPP data available for preparing membership renewal material will be used. For residents of the countries designated by the President, Regular members may, but are not required to, avail themselves of the discounted rates contained within the INCOSE Membership Price List.

Any discounts to Regular member fees due to PPP will be applied prior to determining the percentage dues for the local Chapter and Central.

### **Benefits**

Systems Engineering – The Journal of INCOSE and INSIGHT (the INCOSE Practitioner’s magazine) will be provided in electronic format to all Individual members at no additional cost. Hard copies of the Systems Engineering Journal and INSIGHT are available to Individual members at the INCOSE Member Discounted Price per LST-100 INCOSE Member Benefits Table. The INCOSE Systems Engineering Handbook will be available in electronic format to all individual members at no additional cost.

CAB members benefits are listed in CAB-100 and LST-100 INCOSE Member Benefits Table.

Individual members have access to INCOSE Technical Working Groups and their work products.

INCOSE Presidents on completion of their term receive Individual life-time membership.

Senior members receive reduced rates for the registration and program fees for the International Symposium and International Workshop.

Student members receive reduced rates for the registration and program fees for the International Symposium and International Workshop.

### **Chapter Membership Fees and Chapter Dues**

Individual members can be affiliated to a Regular Chapter, an MOA Chapter (typically a national Chapter), or be “members-at-large”. Members of Regular Chapters and “members-at-large” pay their Individual membership fees directly to INCOSE Central in US Dollars. Members of MOA Chapters pay their Individual membership fees to the legal entity representing the MOA Chapter, where such an entity exists, using the local currency.

Individual member fees are payable upon initial enrollment with INCOSE, and subsequently at the start of each subsequent membership year.

A proportion of the Individual member fees are retained by the Chapter, with the majority going to INCOSE Central. A percentage-based approach is used to determine how much of the member fees are retained by the Chapter, known as “Chapter dues”, and how much is apportioned to INCOSE Central, known as “Central dues”. This percentage figure varies between different types of



membership (Regular, Senior and Student). This set of percentage figures also vary between Regular Chapters and MOA Chapters, in order to recognize the administrative burdens of running an MOA Chapter.

The set of percentage figures will be reviewed by the INCOSE Board of Directors every 3 years, and published in the INCOSE Membership Price List.

In the case of members-at-large, an equivalent amount to the Regular Chapter Dues will be retained by INCOSE Central in a separate budget line.

An MOA Chapter may choose to charge an additional fee on top of the standard membership fees, in order to provide additional services or enabling the bundling of multiple payments (e.g. for national professional registration) into a single payment. However, this additional fee is not included in the percentage-based calculations of Central dues and Chapter dues.

### **Student Members Transition to Regular Member Status**

Student members are encouraged to continue their membership with INCOSE as Regular members once they are no longer eligible for student membership. To facilitate this transition, for the first two (2) years as a Regular member, the individual will be offered a reduced membership fee as detailed in the Membership Price List for PPP Band 1 and PPP Band 2 only. After this transition period, the individual will pay the full Regular membership fee of the appropriate PPP band.

A transition discounted Regular membership fee is not offered to regular members in PPP Band 3, as this band already offers a large discount on the Regular membership fee as detailed in the Membership Price List.

### **Associate Members Transition to Regular Member Status**

Associate members are encouraged to upgrade their membership with INCOSE to Regular membership status to take full advantage of the membership benefits offered. To facilitate this transition, for the first two (2) years as a Regular member, the individual will be offered a reduced membership fee as detailed in the Membership Price List for PPP Band 1 and PPP Band 2 only. After this transition period, the individual will pay the full Regular membership fee of the appropriate PPP band.

A transition discounted Regular membership fee is not offered to regular members in PPP Band 3, as this band already offers a large discount on the Regular membership fee as detailed in the Membership Price List. The CAB organization will be informed of the change of membership status with the number of associated members adjusted accordingly.



The temporary change of membership status of a Regular member of a CAB organization to an Associate member and then back to a Regular membership status within a two-year period is not permitted.

### **Chapter Dues Collection**

Chapter member data will be reconciled with the Chapter twice a year; January (for memberships paid in the months July to December of the preceding year) and July (for memberships paid in the months of January to June).

For Regular Chapters, their Chapter dues will be made available from INCOSE Central following this reconciliation point. For MOA Chapters, their Central dues will be paid to Central following this reconciliation point.

Where an MOA Chapter is collecting membership fees in its local currency, the following applies:

- A baseline exchange rate between the local currency and the US dollar will be established on an annual basis, using a rolling monthly average to smooth out fluctuations.
- This baseline exchange rate will be used when setting the INCOSE membership fee in that country for the next 12 months.
- During the year, membership fees will be collected in local currency and the percentage of Central dues will be paid at the prevailing exchange rate at the time of payment (expected to be shortly after one or both of the reconciliation points).

### **Baseline Chapter Funding**

If the value of the sum of the Chapter dues apportioned to a Chapter falls below the Baseline Chapter Funding amount specified in the INCOSE Membership Price List for the full calendar year, the Chapter will be given this guaranteed amount for their membership due for the year, subject to the constraint that they must have at least 25 active members at the second reconciliation point in the year, at which point the balance of the guaranteed amount will be made available to the Chapter.

This minimum figure will be guaranteed by INCOSE Central and can be included in financial planning activities. If it becomes apparent that the Chapter is not using this minimum funding level to support worthwhile activities then it will be withdrawn.

Should a Chapter find that they cannot operate without a loss, they will be able to request hardship funding from their Sector Director, subject to provision of supporting Chapter financial data. If this situation persists for 3 consecutive years then the full Chapter financial accounts will be reviewed, and



in the case of MOA Chapters, the MOA will also be reviewed and adjusted. This review may assess the future viability of the Chapter.

### **Non-payment of Membership Fees**

An Individual member dropped from INCOSE membership for non-payment of fees may be reinstated upon payment of the member's fees. If membership has lapsed, then the membership year for that member will change to a new 12-month year that starts with the renewal date.

A CAB/CAS member dropped from INCOSE membership for non-payment of fees may be reinstated as an active member by administrative action upon request for reinstatement and payment of the lesser of back fees or the Initiation Fee. Such fees will not be pro-rated.

### **CAB Member Divestment**

If a CAB member divests a portion of its company, then the divested company shall be considered a new CAB member upon submission of a CAB application and payment of the Annual Fees as shown in the INCOSE Membership Price List.

The divested company shall not be required to pay the Initiation Fee.

### **Membership Directory**

The membership directory will include names and contact information for Regular, Senior, and Student members, except those who have indicated a desire not to be included in the directory. Release of the membership directory information for any use other than INCOSE official business must be compliant with the INCOSE Privacy Policy, CIO-101. New membership applications and renewal notices will afford members a means to elect or refuse:

1. Inclusion of their names and personal information in the directory,
2. Distribution of their names and personal information for any other purposes, and
3. Receipt of paper ballots.

### **Responsible Position**

Secretary

### **Related Policies**

MBR-101: Periodic Update of Membership Fees



CAB-100: Corporate Advisory Board

CHP-101: Additional Services for Chapter Affiliation Sponsors

CIO-101: Personal Information Protection

LST-100 INCOSE Member Benefits Table

LST-101 INCOSE Membership Price List

**SUPERSEDES: MBR-100 dated October 16, 2020**

**APPROVED BY: INCOSE Board of Directors, Virtual Board Meeting, 15 April 2021**

**POLICY OWNER (RACI Responsible R): Sector Directors**

**MAINTAINED BY (RACI Accountable A): Secretary**