SVC-100: Services Operations Infrastructure – 13 October 2022

Purpose

This policy defines the structure of INCOSE Services Operations, noted hence as Services.

Applicability

Services includes Education and Training, Certification, Events, Community Offerings, development of new services, and governance of each. The primary objective of Services is to, "Provide value through impactful services." This relates to all facets of systems engineering across all sectors of application.

Definitions

Here are definitions of terms used within or related to this policy. These are based on general dictionary definitions[1] and consistent with definitions noted in other INCOSE policies, which are noted as such.

Service – An act of helpful activity. Within INCOSE, service refers to an activity which supports the systems engineering community with professional development, recognition, networking, and/or engagement with systems engineering material[2].

Certification – The action or process of providing someone with an official document attesting to a status or level of achievement. Within INCOSE, certification refers to the INCOSE Systems Engineering Professional (SEP) program[3].

> *Associate Systems Engineering Professional (ASEP)* – Certification which provides recognition of SE knowledge based on the INCOSE SE Handbook.

> *Certified Systems Engineering Professional (CSEP)* – Certification which recognizes those who have demonstrated a baseline of SE knowledge and experience.

> *Expert Systems Engineering Professional (ESEP)* – Certification which recognizes those who have demonstrated extensive experience and leadership in the practice of systems engineering.

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[1] Lexico, powered by the Oxford Dictionary, <https://www.lexico.com/en/definition>, accessed September 2022.
[2] Noted in TEC-107: INCOSE Technical Product & Service Development and Delivery.
[3] Noted in CER-100: INCOSE Professional Certification Program Administration.

Education – The process of receiving or giving systematic instruction, especially at a school or university. Within INCOSE, education is the process of receiving or giving systematic instruction related to systems engineering, especially at a school or university.

Event – Something that occurs in a certain place during a particular interval of time. Within INCOSE, an event is a planned activity which fosters systems engineering learning[4].

> *Global Events* – Activities worldwide in scope which are directly planned and overseen by the Events Committee. Per EVT-100, the established global events include the International Workshop (IW), International Symposium (IS), and Human Systems Integration (HSI) conference.

> *Local Events* – Activities sponsored and arranged by a chapter to serve the members of INCOSE in their area.

> *Regional Events* – Activities which span more than two days and solicit participation from members outside the geographic range of a single chapter; they may be hosted by one (1) or more chapters either singly or in collaboration with other organizations. Examples include the Great Lakes Northern Conference and the Western States Regional Conference.

> *Sector Conferences and Workshops* – Activities hosted by one (1) or more chapters either singly or in collaboration with other organizations. An example is the Europe, Middle East, and Africa (EMEA) Workshop.

> *Working Group Events* – Activities sponsored and arranged by a specific INCOSE working group in their subject area. An example is the Healthcare Working Group.

Training – The action of teaching a person a particular skill or type of behavior. Within INCOSE, training is teaching a person a particular skill or type of behavior related to systems engineering.

Policy Content

Services Leadership

As shown in Figure 1, Services includes the following leadership positions:

- Services Director
- Deputy Services Director
- Associate Director (AscD), Education and Training
- Associate Director, Certification
- Associate Director, Events

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[4] Noted in EVT-100: Events Committee Charter.

- Assistant Director (AstD), Events Portfolio Management
- Assistant Director, Community Offerings

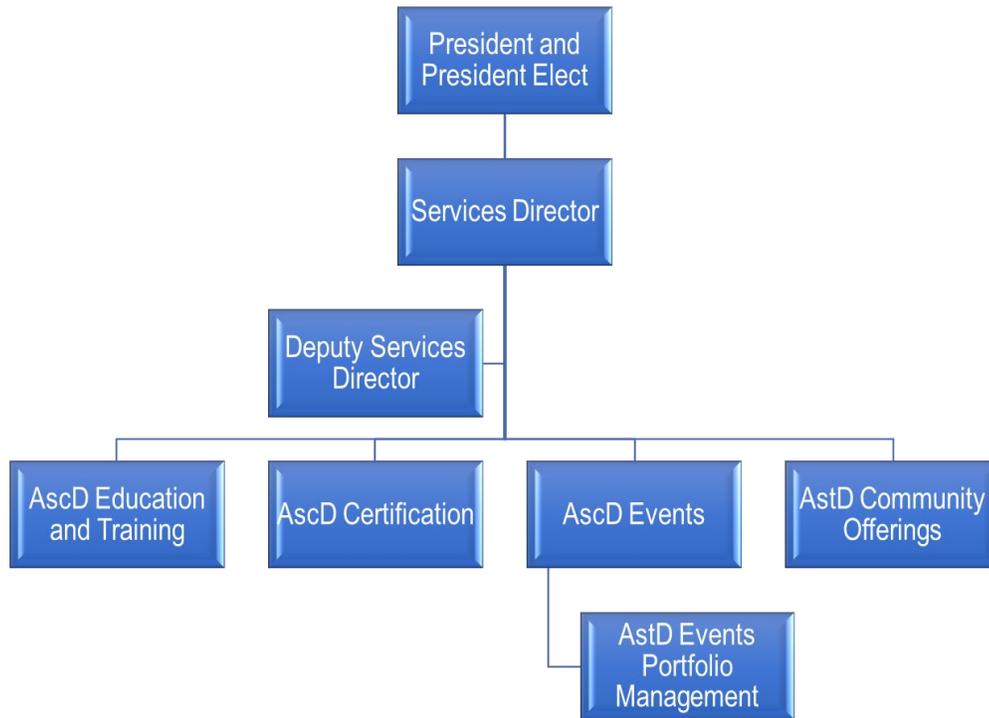These leadership positions shall be required to be INCOSE regular or senior members.

Figure 1: Services Leadership Positions

Authority and Responsibilities

The Services Director is accountable for the proper implementation of this policy, the effective interactions with other areas of INCOSE, appropriate interactions with other policies, and sufficient staffing and resources required to execute this policy. Furthermore, the Services Director has the responsibility to process temporary deviations from this policy as needed with approval from the Executive Committee, which is a subset of the INCOSE Board of Directors (BoD).

The Associated Directors (AscDs) and Assistant Directors (AstDs) within Services shall work to identify, prioritize, and initiate service activities within their assigned area considering the input from key stakeholders including the Services Director, members of the BoD, other AscDs and AstDs, and relevant Services members.

Policy Requirements

Roles & Responsibilities
- The Services Director, who is a voting member of the BoD, shall lead the Services organization.
- The Deputy Services Director, who is a non-voting member of the BoD, shall support the Services Director as needed.
- The Services Associate Directors are non-voting members of the BoD and their roles are:
  - Certification – Oversee the INCOSE Certification Advisory Group (CAG) and Certification Program Manager to ensure the successful planning and execution of the INCOSE Professional Certification program.
  - Education and Training – Lead the INCOSE education and training activities and ensure the successful planning and execution of INCOSE education and training initiatives.
  - Events – Lead the INCOSE event team and ensure the successful planning and execution of INCOSE Global Events.
- The Service Operations Assistant Directors are not members of the BoD and their roles are:
  - Events Portfolio Management – Responsible to the AscD Events to ensure consistent information across INCOSE events, establish and maintain a database of INCOSE events, and lead strategic planning for new INCOSE Global Events.
  - Community Offerings – Lead and coordinate the delivery of virtual community offerings (i.e., webinars, system exchange cafés, and "Spotlight On" discussions), develop and improve specific offerings, and consider changes / new offerings as needed to ensure there are a range of virtual activities that engage the members and potential members of INCOSE with conversation and discussions about systems-related topics.
- The Services organization shall maintain descriptions of the roles and responsibilities of its leadership.

Methods of Appointment
- The Services Director is appointed by the BoD on the recommendation of the President.
- The Deputy Services Director is appointed by the BoD on the recommendation of the President.
- The ServOps Associated Director positions are nominated by the Services Director, and then the President may appoint them as Associate Directors per BOD-101.
- The ServOps Assistant Director positions are nominated by the Services Director, and then the President may appoint them as Assistant Directors per BOD-101.

Terms of Office
- The term of office of the Services Director is defined in BOD-100 as 2 years.

- The term of office of the Deputy Services Director is concurrent with the term of the Services Director (2 years). The Deputy Services Director succeeds the Services Director for another 2 years.
- Terms of office for Associate Directors are a maximum of three (3) years, while the terms of office for Assistant Directors are also a maximum of three (3) years per BOD-101.
- The Services Director will ensure that all the AscDs and AstDs do not turn over at the same time.

SUPERSEDES: None, new policy

APPROVED BY: INCOSE Board of Directors, Q4 BoD Meeting, Remote, 13 October 2022

MAINTAINED BY (RACI Responsible R): Services Director

POLICY OWNER (RACI Accountable A): President-Elect