

OUT-PROC-02: EXTERNAL EVENTS – Awareness, Participation, and Support August 2023



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Foreword

There are several systems engineering-related external events / conferences held each year that INCOSE organizations (e.g., Technical Operations Working Groups & Initiatives, Chapters, Special Projects (i.e., Future of Systems Engineering or FuSE), and Outreach) consider attending. As a result, coordination across INCOSE for awareness, participation and potential support is necessary.

The process from identifying the event by the INCOSE organization / member to submitting a summary report is described in this document.

This does not include the INCOSE Events described in EVT-101 Events policy. The events in this procedure are non-INCOSE events that INCOSE organizations or members are considering attending representing INCOSE.

Document Change History

The following table identifies each version or issue of this document and provides a description of the purpose or reason for the change. Performing a document comparison between any two versions of this document can identify detailed change differences.

Version	Date	Comment
0.1	11 Apr 23	Draft initial process.
0.2	25 Apr 23	Updated initial draft
0.3	8 May 23	Update with INCOSE Leadership comments
1.0	14 May 23	Initial completed version
1.1	5 Jul 23	Adding in information after meetings with Tech Ops, MARCOM, and Executive Director
1.2	7 Jul 23	Much Board coordination – major rewrite to make it easier to update as we get more strategic
1.5	25 Aug 23	Accepted all Board Updates

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1.0 Scope

1.1 Purpose

This procedure applies to external systems engineering-related events and conferences not identified in EVT-101 Events policy. The events in this procedure are non-INCISE events that INCISE organizations or members are considering attending representing INCISE.

This procedure does not apply to events individuals are considering attending on their own and not representing INCISE.

1.2 Objectives

The objective of this process is to identify potential systems engineering-related events INCISE organizations or members are considering attending to provide awareness across INCISE; information about sponsoring, leading, and general participation; and potential support.

1.3 Overview – Which Section(s) to Review

Which part of the process is applicable to your situation? Ask yourself the following questions and learn which section(s) to review.

1.3.1 Is your Event an Approved INCISE Event?

If so, review section 2, Event Identification.

1.3.2 What is the INCISE External Event Strategy?

It is available in section 4, The External Event Annual Strategy.

1.3.3 Do you want INCISE to Sponsor an External Event?

If so, review section 5.1, Approval for INCISE Sponsoring an External Event.

1.3.4 Would you like INCISE to Lead / Co-Lead an External Event?

If so, review section 5.2, Approval for INCISE Leading an External Event.

1.3.5 What are the Responsibilities / Tasks for Attending an Event?

To learn the responsibilities / tasks required when you attend an external event representing INCISE, review section 6, INCISE Organization / Member Actions.

1.3.6 What Support can you Request for Events?

To learn the available support, review section 7 Requesting Support.

1.3.7 What are Some Future Considerations for Future External Events?

To learn the considerations the Outreach Team is considering, review section 8, Future External Events.

2.0 Event Identification

It is agreed that the goal is to maximize awareness of all external events where INCOSE plays a support role and/or where our members may find value. It is also agreed that INCOSE does not want to be seen as ‘endorsing’ products or companies outside of the parameters of how we sell sponsorships and partnerships, etc., and protect the INCOSE brand and integrity along the way.

2.1 Types of Events

2.1.1 INCOSE Events

INCOSE events (IW, IS, sector events, regional events, chapter events, INCOSE-run webinars, etc.). These are clearly the ones with the most impact through INCOSE and should be given the highest priority regardless of the level at which they are planned and executed. These are covered by policy EVT-101 Events, and therefore, not part of this process.

2.1.2 Non-INCOSE System Engineering-Related Events

Non-INCOSE systems engineering-related events are those external events that are the objective of this process. They need to be identified to provide awareness across INCOSE and determine which ones should be supported with an INCOSE exhibit / booth, presentations, keynote speakers, etc. The following are examples of potential systems engineering-related events:

- Events where INCOSE is a marketing, or other partner,
- Events where INCOSE is a sponsor (technical or financial) or participant,
- Events being put on by an alliance with who INCOSE has a formal Memorandum of Understanding (MOU) with or an informal relationship,
- A domain specific conference, where the application of systems engineering could be relevant, and INCOSE strategy would like to explain potential of application relevant to the domain, and
- Events with no direct INCOSE involvement but that could be of interest to members for knowledge sharing and networking (i.e., some that could be included like CSER, etc. This is where INCOSE needs to be very careful about certain types of events – see the first bullet in section 2.1.3).

2.1.3 Non-INCOSE Events / Non-Systems Engineering-Related Events

There are other external events where it is not in the best interest of INCOSE to be involved. Examples of these type of events include:

- Where it is possible it could be seen that INCOSE is ‘endorsing’ products or companies outside the parameters of how we sell sponsorships and partnerships (MARCOM will keep us informed on what we are selling and the compensation we are getting for using our marketing platform), and
- A workshop rolling out a new product (e.g., such as if Dassault wants us to advertise a pay-to-play Cameo workshop).

2.2 Value of Event Attendance

To attend and participate in the type of events listed in section 2.1.2 Non-INCOSSE Systems Engineering-Related Events, the members of an INCOSSE organization (i.e., Technical Operations Working Group or Initiative, Chapter, Outreach, etc.) considering the external event, need to determine the value to INCOSSE overall / value to the respective INCOSSE organization before permission to attend. The value of attending could include relationship to the INCOSSE Strategy, supporting FuSE, in the alliance Memorandum of Understanding (MOU), knowledge sharing, networking, collaboration, joint activity with an alliance, etc. Once the INCOSSE Strategy is in place, the external events could be prioritized based on the most related to the strategy. The value of attending will be included in the Background section on the Evaluation of Requested Travel page in FIN-FORM-01 Travel Request Form.

2.3 INCOSSE Event Participation Strategy

Depending on the reason for the event (left-most column), Figure 2-1 displays which INCOSSE organizations would potentially lead / support the external event. This is just a starting point for discussions to determine which INCOSSE organizations would lead and / or support the event.

INCOSSE External Event Participation Strategy											
Reason / Request	Outreach	Tech Ops	Service Ops	Ascd Education & Training	Ascd Events	Sector Directors	MARCOM	Academic Council	CAB	Fellows Committee	SYSTEM
Exhibit / Booth	Covers										
Event Ambassador Registration	Covers										
MOU Addendum A Item	LEAD	(Support)	(Support)			(Support)	Support				
INCOSSE Wants an Ambassador	LEAD	(Support)	(Support)			(Support)	Support				
INCOSSE Wants an Alliance	LEAD	(Support)	(Support)			(Support)	Support				
Student SE Awards	LEAD						Support			Support	Support
Supporting INCOSSE Strategy	LEAD	(Support)	(Support)			(Support)	Support				
Request to be Sponsor	LEAD	(Support)	(Support)			(Support)	Support				
WG / Initiative Relationship	LEAD	(Support)					Support				
Development of Standards	LEAD	(Support)					Support				
Request Track(s) & Papers	LEAD	(Support)					Support				
Chapter Event	LEAD*					(Support)	Support				
Service-Related Event	LEAD		(Support)				Support				
Professional Development	LEAD			(Support)			Support				
Academic Event	LEAD						Support	(Support)			
Corporate Event	LEAD						Support		(Support)		

KEY

Covers - Which budget will cover the costs

LEAD - INCOSSE Organization to lead coordination of support, including budget

LEAD* - INCOSSE LEAD TBD depending the topic of the event

Support - INCOSSE Organizations supporting Event LEAD, contributing some budget

()'s - May or may not support

Blank - LEAD may reach out to other INCOSSE organizations, if needed

NOTES Depending on the event, some may be joint led

Figure 2-1: INCOSSE External Event Participation Strategy

This document contains INCOSSE Proprietary Information.

2.4 Awareness and Support

The remainder of this procedure discusses the external event stakeholders, the INCOSE organization / member providing awareness of external events and attendance, and when support is requested, the process for Events, Technical Operations, Chapters, Outreach, and Marketing and Communications.

3.0 Stakeholders

3.1 Executive Director

The Executive Director is a new position for INCOSE. As they learn more about the INCOSE policies, procedures, templates, and forms, they will work with the Outreach Director incorporating more efficiency into this process.

3.2 Associate Director Events

Provide strategic awareness of the global portfolio of INCOSE events beyond the centrally planned global events (e.g., Sector, regional, locally planned, or working group planned events), as well as the non-INCOSE Systems Engineering-related events. Using this information, Events will identify gaps or targets of opportunity and, where appropriate, develop new events (e.g., mini virtual events) to address these. Events will also improve awareness of the overall portfolio to INCOSE membership and the broader systems engineering community. [NOTE: Taken from policy EVT-100 Events Committee Charter.] Also, if the INCOSE organization requests support from the Events Team and / or KMD, the Events Committee will coordinate with KMD.

A listing of all of these upcoming events is provided on INCOSE's Events and News webpage (<https://www.incose.org/events>).

Additionally, per Figure 2-1 INCOSE External Event Participation Strategy, if the reason for the event is to provide a track and / or papers, Events may support the external event.

3.3 Marketing and Communications Director

Based on requests, Marketing and Communications (MARCOM) will work with INCOSE Central to learn how the INCOSE organization or member would like to promote the event. This includes (1) a potential marketing campaign with the exposure type and quantities of website listings, social posts, emails, etc., and (2) working with INCOSE Central providing promotional merchandise.

Additionally, per Figure 2-1 INCOSE External Event Participation Strategy, MARCOM may or may not provide support for the external event.

3.4 Outreach Director

The objective of INCOSE Outreach is to identify these areas of overlapping best practice, interpret them for our membership, and promote complementary INCOSE knowledge externally. Through the formation of Alliances, the state of best practice may be improved through joint promotion and joint work programs.

Based on requests, Outreach will work with the INCOSE organization or member to provide Outreach services to provide Outreach Team members, Ambassadors, etc. to “man” the INCOSE

booth and / or provide funding support for event attendance. Outreach will coordinate support with other INCOSE organizations such as Technical Operations, Sector Directors, MARCOM, etc.

Additionally, per Figure 2-1 INCOSE External Event Participation Strategy, depending on the reason, Outreach may lead and / or support the external event.

3.5 External Event Advocate

This paragraph applies to the respective INCOSE Leadership who are the event advocates (i.e., Tech Ops for working groups, sector directors for chapters, etc.).

For the external events the INCOSE Leadership want a presence at, they will work with the Outreach Leadership Team to ensure their request is known, provide any additional support needed beyond the minimum number of event ambassadors, and provide support to planning the external event.

3.6 Other INCOSE Leadership

This paragraph applies to other INCOSE Leadership, i.e., Technical Operations Director, Service Operations Director, Director of Academic Matters, Sector Directors, Corporate Advisory Chair, Associate Director Education & Training, Fellows Committee Chair, and SySTEM Lead.

Based on external event location (i.e., Sectors 1, 2 or 3) and / or members from their organization involvement, the respective INCOSE Leadership will be informed of external events in their area. Additionally, per Figure 2-1 INCOSE External Event Participation Strategy, the INCOSE Leadership may be contacted for support and / or lead some external events.

4.0 The External Event Annual Strategy

The Outreach Leadership Team will prepare, budget for, and execute the External Event Annual Strategy.

4.1 Preparing the External Event Annual Strategy

During the second quarter, the Outreach Leadership Team will develop the External Event Annual Strategy for the next budget year. In creating this strategy, the Outreach Leadership Team will:

- Review the previous and current year's event attendance results and reports to determine if those events were "successful" meeting strategic guidance to warrant future participation.
- Review any new events requested to be attended to ensure they meet the strategic guidance for INCOSE.
- Review any requests for sponsoring external events to ensure they meet strategic guidance.
- Review any requests for leading / co-leading external events to ensure they meet strategic guidance.
- Determine which external events INCOSE exhibit booths will be need and the associated costs.
- Determine the number of Event Ambassadors that will be needed and the associated approximate travel and registration costs.

4.2 Submitting the Annual Budget for the External Event Annual Strategy

After next year's External Event Annual Strategy has been developed, the Outreach Director will inform the INCOSE Leadership of the plan to see if there are any comments or questions. The completed strategy will be submitted as the Outreach budget for the next year.

4.3 Post-Budget Approval Requests

After the budget is approved, the Outreach Director will review all additional requests to ensure they meet strategic guidance. If so, then the Outreach Director will submit it to the Budget and Planning Committee, and if necessary, to the full Board of Directors.

4.4 Executing the External Event Annual Strategy

Based on the approved Outreach budget, the Outreach Director and Leadership Team will execute the External Event Annual Strategy.

5.0 Sponsoring / Co-Leading Events

If an INCOSE member would like INCOSE to sponsor or co-lead an external, non-INCOSE event, then there are actions that must be completed several months before the event and approval must be obtained before committing INCOSE resources.

5.1 Approval for INCOSE Sponsoring an External Event

Normally, when an external event is sponsored, the leaders of the event request money to support the event (e.g., \$10-20,000). In return, the sponsoring organization receives a “free” booth and a number of free exhibitor registrations to “man” the booth.

If an INCOSE Member would like INCOSE to sponsor / co-sponsor an external event, they must submit a request to INCOSE Outreach preferably before the International Symposia, but no later than the end of August in order to be included in the budget for the next year. INCOSE Outreach will keep other INCOSE Leadership informed as appropriate (e.g., Tech Ops, Sector Directors, MARCOM, Services, etc.). The request will include:

- The cost of sponsoring / co-sponsoring the event,
- The goals, objectives, and rationale for the INCOSE Leadership approving the request (e.g., consistent with the INCOSE strategy, supporting FuSE, listed in the alliance Memorandum of Understanding (MOU), etc.),
- The number and type (i.e., working group members) of people to “man” the booth, and
- Any additional requests for the event.

5.2 Approval for INCOSE Leading an External Event

If an INCOSE Member would like INCOSE to lead / co-lead an external event, they must submit a request to INCOSE Outreach preferably before the International Symposia, but no later than the end of August in order to be included in the budget for the next year. INCOSE Outreach will keep other INCOSE Leadership informed as appropriate (e.g., Events, Tech Ops, Sector Directors, MARCOM, Services, etc.). The request will include:

- The cost of leading / co-leading the event,
- The goals, objectives, funding, and rationale for the INCOSE Leadership approving the request (e.g., consistent with the INCOSE strategy, supporting FuSE, listed in the alliance Memorandum of Understanding (MOU), etc.),
- The resources that will be needed for the event,
- (If an INCOSE booth) The number and type (i.e., working group members) of people to “man” the booth, and
- Any additional requests for the event.

If the request is not submitted before the INCOSE budget is approved, then if approved, the Outreach Director will submit the request to the Budget and Planning Committee, and if necessary, to the full Board for approval.

6.0 INCOSE Organization / Member Actions

When an INCOSE organization or member is considering participating in an external event (like the examples provided in Section 2.1.2 “Non-INCOSE Systems Engineering-Related Event”) and they would like INCOSE support and / or reimbursement, they will need to do three things:

- 1) Complete the New Event Submission Form (Section 6.1.1) to provide awareness to the INCOSE Leadership and to the INCOSE members;
- 2) Request permission to attend the external event (Section 6.2);
- 3) Determine if any INCOSE Support is needed (Section 6.2.2); and
- 4) Submit all post-event forms (travel reimbursement, post-event report, and an input to the INCOSE Newsletter in Section 6.3).

6.1 Providing Awareness

The first thing to do is to provide awareness to INCOSE members about the external event.

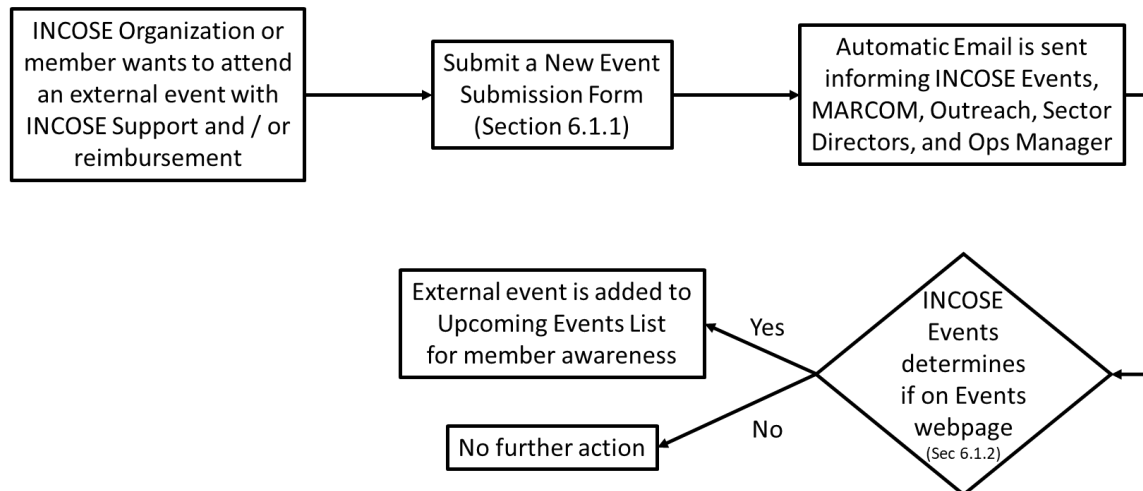


Figure 6-1 External Events: Providing Awareness

6.1.1 New Event Submission Form

The New Event Submission Form is available at <https://app.smartsheet.com/b/form/8755a0e866854485b7ffb8b9ec9aa02c>.

In the form, the INCOSE Organization or member provides the following information:

- Contact information for the individual submitting the form;
- The event information, i.e., who is holding the event, the event title, start & stop date, time zone, primary language, which sector, the event description, related event website(s), if a closed event, registration link, and any other information necessary to provide; and
- Initial support / assistance from Marketing & Communications, INCOSE Central, Outreach Team, and / or Events Committee.

Once the submit button is clicked, an email with the event information is sent to Events, MARCOM, INCOSE Central, Sector Directors, and the Outreach Director. This will provide awareness to the INCOSE Leadership.

6.1.2 Upcoming Events Listing

When INCOSE Central receives the email and Events team has had an opportunity to reflect the validity of the submission for non-INCOSE related events, the event information is added to the “Upcoming Events” listing on the INCOSE Events and News webpage (<https://www.incose.org/events>). When the event information is added to the Upcoming Events listing, this will provide awareness to INCOSE members.

6.2 Requesting Attendance / Participation

When an INCOSE member requests to participate in an external event and receive reimbursement, they will represent INCOSE and NOT their personal organization.

When an INCOSE organization or member is decides they would like to attend / participate in an external event representing INCOSE and / or requesting travel reimbursement (like the examples provided in Section 2.1.2 “Non-INCOSE Systems Engineering-Related Event”), next they will need to:

- Determine the value of attending the event (Section 2.1.3),
- Submit a FIN-FORM-01 Travel Request Form, and
- Consider if INCOSE support is needed (see Section 2.3 for which part of INCOSE will lead / support the event based on the reason of the event).

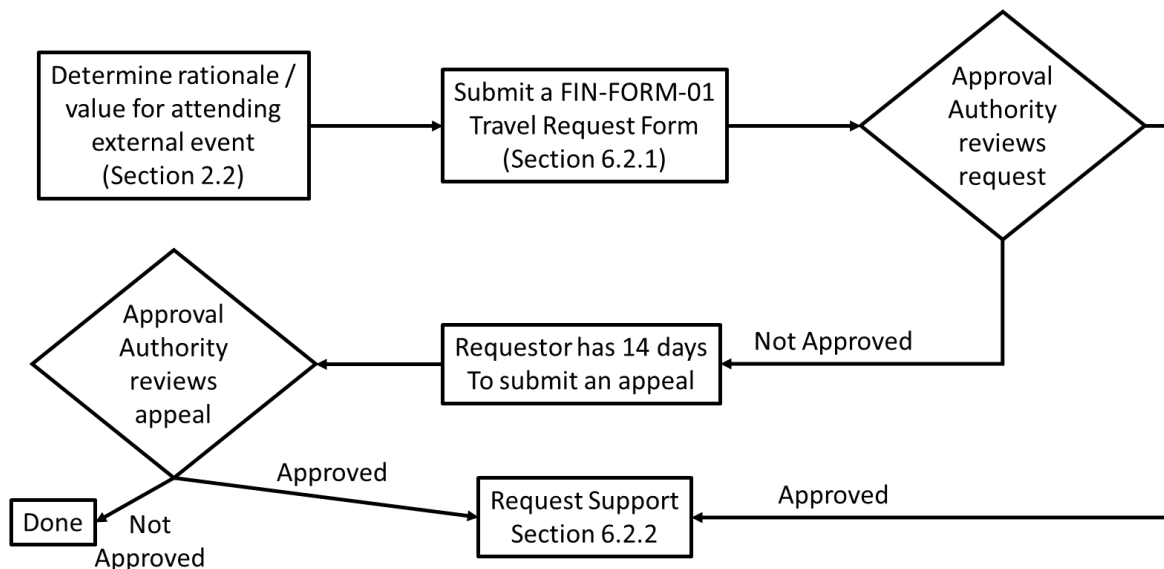


Figure 6-2 External Events: Requesting Participation

6.2.1 FIN-FORM-01 Travel Request Form

If the organization or INCOSE member knows that want to attend an external event, they should request attendance from the Outreach Director as soon as possible in order for the travel, registration, and (if needed) support reimbursement to be included in the budget (the Outreach Director will keep the appropriate INCOSE Leadership informed when their folks submit requests). Preferably, FIN-FORM-01 should be submitted before the International Symposium, but no later than the end of August. The goal is to be included in the following year's budget. If a request is received after the budget is approved, then if approved by INCOSE Outreach (after coordination with the appropriate INCOSE Leadership), the Outreach Director will submit to the Budget and Planning Committee, and if necessary the full Board for final approval. If multiple people want to attend the external event, the approving authority for FIN-FORM-01 will determine if any, some, or all will be allowed to attend.

To request attending an external event, a FIN-FORM-01 Travel Request Form should be submitted to the Outreach Director. This includes any potential financial support and the value of attending the external event (see Section 2.2). The submitter will complete the following in FIN-FORM-01:

- Trip Information (page 1) – Event name & purpose, estimated costs, and their signature.
- Evaluation of Requested Travel (page 2) –
 - Top box (background information) – Name of trip, purpose, location of trip, name of event, travel and associated costs (ceiling), Background (value – i.e., ***provide a clear rationale for participation per section 2.2***), and value exchange to INCOSE in cash or in kind (e.g., free / reduced registrations, marketing, advertising, etc.).
 - Bottom box (travel supports goal / principle) – if true, place an “X” in the cell of the matrix of Impact/Partnership/Holism/Differentiation/Volunteer versus Growth/Alliances/Education/Products/Forums/Competency/Transformation.

The approval authority will review the submitted FIN-FORM-01 and will determine if the travel request is approved based on rationale for participation, budget, etc. If the travel request is not approved, the submitter has 14 days to submit an appeal with additional any needed rationale. If the appeal is not approved, then the decision is final.

6.2.2 INCOSE Support for an External Event

Information on support for the external event is provided in the following sections:

- Events Team – Section 7.1,
- Marketing & Communications – Section 7.2, and
- Outreach Team – Section 7.3.

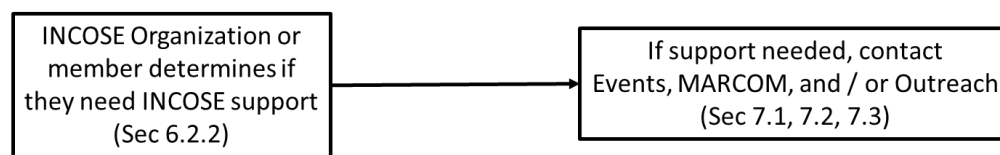


Figure 6-3 External Events: Providing Support

If the Event Ambassadors (INCOSE participants “manning” the booth) need a video / PowerPoint slide show to play on a monitor at their booth, INCOSE Marketing and Communications have created branded guided briefs that can be tailored and used for the specific external event. These briefs are available on the [MarCom SharePoint site](#). If assistance is requested to tailor the brief, please contact marcom@incose.net.

6.3 Post-Event Activities

Finally, after the external event, five items need to be completed: (1) FIN-FORM-02 Expense Reimbursement Form and (2) Event Summary Report.

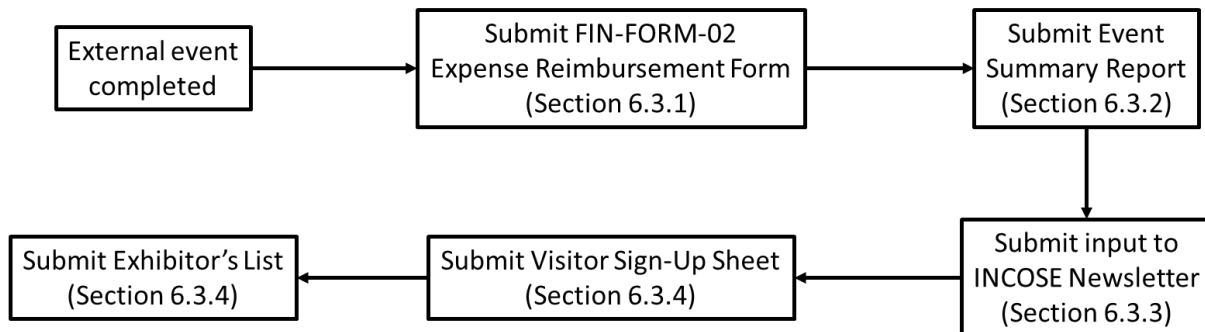


Figure 6-4 External Events: Post-Event Activities

6.3.1 FIN-FORM-02 Expense Reimbursement Form

Per FIN-PROC-01 Expense Reimbursement Procedures, the FIN-FORM-02 Expense Reimbursement Form is submitted to the INCOSE Leaderships who approved the travel request.

6.3.2 Event Summary Report

Within 2 weeks from the end of the event, the INCOSE Organization / Member will submit a summary report to Outreach, MARCOM, and Events, and if WG/Chapter Related, to Tech Ops and / or Sectors Directors as applicable. Here's items that should be included in the report.

- Overall Comments – Event summary
- Value to INCOSE – Overall, and if supporting the INCOSE Strategy, how it supported it.
- Value to Outreach – New alliance? Potential new Ambassadors / Relationship Managers?
- Value to MARCOM – What results can MARCOM report in social media, etc.
- Value to Events – Any updates?
- Value to Tech Ops – Anything new for WGs and Initiatives?
- Value to Sector Directors – Anything new for chapters?
- Recommendation on Attending in the Future? If so, when (approximately) is the next one.

This report will be used to influence the future Outreach strategy.

6.3.3 Input for INCOSE Newsletter

A short summary of the event will be drafted and sent to the approval authority and the Director of Marketing and Communications for an upcoming newsletter article. It should include what the event was, when and where it was held, what the value to INCOSE was, what value INCOSE brought to the event, and who represented INCOSE. If there were new members or new alliances because of the event, that can be included, too. It is also preferred if the Event Ambassadors (the people who “manned the booth, e.g., Outreach representatives, relationship managers, working group members, chapter members, etc.) took photos of the conferences they attend with the INCOSE merchandise and banners. This will help expand INCOSE’s marketing and public relations reach. MARCOM needs photos for spotlights and newsletters. This will benefit all parties involved.

6.3.4 Visitors to the INCOSE Booth

At external events, there will be visitors to the INCOSE booth, and we want to keep track of them. INCOSE Outreach will provide the Event Ambassadors (section 8.3.3) a sign-up sheet to record all people that stop by the booth. On the sheet, the following will be recorded:

- Name of person stopping by,
- Email of person stopping by,
- INCOSE person(s) they talked with, and
- Their interest areas in INCOSE.

The Event Ambassadors will provide this sign-up list to INCOSE Outreach. INCOSE Outreach will forward the information to the New Member Committee, as well as points of contact for the Booth Visitor’s interest areas for follow-up.

6.3.5 Exhibitor List

INCOSE Marketing and Communications would like a list of exhibitors for future marketing. The Event Ambassadors will forward the exhibitor list to INCOSE Marketing and Communications.

7.0 Requesting Support

7.1 Event Team Support

7.1.1 Support from the Events Team

In addition to the basic event information listed in section 6.1.1, there is an “Events Committee Assistance” section in the New Event Submission Form asking if the submitter would like assistance from the Events Team. If the submitter selects “yes,” a member of the Events Team will reach out to them.

7.1.2 Support from the Conference Planning Contractor KMD

Also, in the “Events Committee Assistance” section in the New Event Submission Form, it asks if the submitter would like assistance from KMD. INCOSE contracts with KMD to provide event management services working directly with our Events Committee. Please note that these services are paid by the event producer (e.g., chapter, working group, region, sector, etc.) out of their respective event budget, and are not paid from INCOSE central budgets. The producer can opt to pay for:

- KMD Conference Platform,
- KMD Marketing Service, and
- KMD Conference Planning & Management.

7.2 Marketing & Communication Support

In addition to the information requested in the “New Event Submission” form, there are three additional Marketing and Communications forms to complete for support from the MARCOM Team.

7.2.1 MARCOM Assistance in “New Event Submission Form”

In addition to the basic event information listed in section 6.1.1, this form contains a “Marketing and Communications Assistance” section and asks how you would like MARCOM / INCOSE Central to promote this event (e.g., select checkboxes for INCOSE's Events Website Calendar, INCOSE's Social Media Platforms, eNote (Monthly Publication), Email Blast, and / or Other with a note that if you wish to have this event posted on INCOSE's social media platforms, the MARCOM and INCOSE Central teams need MORE than 30 days' notice of the event. But they will always try their best to accommodate our communities.

There is an additional question if you need additional help from the MarCom Team including an Email Campaign, Social Media Campaign, Flyer Development / Design, Logo Design, etc. If so, select the yes radial button.

The more time you provide the Marketing and Communications Team, the more time they will have to support your requests.

7.2.2 Market Campaign Request Form

If you would like a marketing campaign for your external event, you can provide more details to the Marketing and Communications Team using the Market Campaign Request Form (<https://app.smartsheet.com/b/form/0cbbdff532a14de196ba97fca1d981b8>). The following information is requested:

- Requestors names and emails,
- Short name for the request (e.g., NAFEMS 2023),
- The type of campaign requested (i.e., Event Promotion, New INCOSE Initiative Promotion, New Product Release Promotion, Sponsorship Promotion, or Other),
- Community Name (i.e., INCOSE Organization – chapter, working group committee, etc.),
- Will you require assistance from the MARCOM Design Team (e.g., Banners, Flyers, Graphics, Social Media Posts, Logos, etc.),
- Request description,
- Do you have any budget allocated or available to support this campaign?,
- Requested due date (request more than 30 days notice, if less than 30 days notice there is a check box to click for URGENT), and
- If you have attachments, you can upload them.

7.2.3 INCOSE Promotional Merchandise Requests Form

If there are requests for promotional merchandise for an exhibit / booth, then submit the INCOSE Promotional Merchandise Requests Form (<https://app.smartsheet.com/b/form/7cf54a843a324093afc4b80ba7fb32a6>). The following information is requested:

- Requestors names and emails,
- INCOSE Member ID number,
- What chapter of working group are you a member of (This should be the group that you are requesting these items on behalf of),
- Why do you need these materials?,
- What INCOSE merchandise would you like (select all that apply),
- Full address for shipping (Please note that this will be shipped to the contact person above unless otherwise specified here. Include all Postal Codes, Country Codes and Country.), and
- Any other information you wish to include.

7.2.4 America's Sector Banner Sponsorship Form

For the America's Sector, there is a banner sponsorship form (<https://app.smartsheet.com/b/form/cf08c11e6d2f448c9a307e448a499973>). The following information is requested:

- Requestors names and emails,
- INCOSE Member ID number,
- What chapter is this for,
- Which two (2) banners would you like (View the banners here: [Retractable Banners](#))?,

- Full address for shipping (Please note that this will be shipped to the contact person above unless otherwise specified here. Include all Postal Codes, Country Codes and Country.), and
- Any other information you wish to include.

7.3 Outreach Support

7.3.1 Outreach Assistance

In the New Event Submission Form, the basic event information requested is listed in section 6.1.1. There is also an “Outreach Assistance” section asking if the submitter would like assistance from the Outreach Team. If the “Yes” radial button is selected, the Outreach Director will contact the submitter to learn more details on what support is needed.

7.3.2 Outreach Coordination

Based on the reason for the event in Section 2.3, Figure 2-1 “Event Participation Strategy,” if needed, the Outreach Team will coordinate planning meetings and assign a lead for the event. This coordination could be sharing funding when several people would like to attend, coordinating efforts with MARCOM, etc.

7.3.3 INCOSE Booths at External Events

If the requesting rationale for attending the external event (i.e., consistent with the INCOSE strategy, supporting FuSE, in the alliance Memorandum of Understanding (MOU), etc.), then an INCOSE booth may be appropriate. If so, INCOSE Outreach will cover the booth expenses (if not provided for free in Addendum A of the MOU).

Depending on the theme of the external event, INCOSE Outreach will reach out to the working groups, chapters, outreach, etc. to “man” the booths as the Event Ambassadors (section 8.3.4). When INCOSE Outreach reaches out for people support, the Outreach Director will cover the travel and registration costs. FIN-FORM-01 Travel Request Form and FIN-FORM-02 Expense Reimbursement Form will be submitted to the Outreach Director. At times, the Outreach Director may reach out the local chapter for Event Ambassador support (like was done for the 2023 Energy & Mobility Conference in Cleveland Ohio by the North East Ohio Chapter).

7.3.4 Event Ambassadors

The people that “man” the INCOSE exhibit / booth at external events are called “Event Ambassadors.” They are Ambassadors for INCOSE when they “man” the exhibit / booth – no matter which external event is attended.

Where do these Event Ambassadors come from? They could be from Outreach, working groups / initiatives in Technical Operations, Chapters, MARCOM, INCOSE Operations (UMS), etc., i.e., from anywhere across INCOSE. These individuals never know what the discussions will be at the exhibit / booth ahead of time and may not know everything about what INCOSE is doing

currently, therefore Outreach will provide them with training and a document of brief overviews of selected INCOSE areas to study before the event (and can refer to it during the event) so everyone is “singing from the same sheet of music.”

Here are the topics on this brief overview and who is responsible for the information:

- What is INCOSE? (MARCOM or Operations Manager)
- What is the value of INCOSE Membership? (Secretary / Membership)
- How do you become an INCOSE Member? (Secretary / Membership)
- What are the updates in the new SE Handbook V5? (SE Handbook Lead)
- What is the SE Vision 2035? (SE Vision 2035 Lead)
- What is the Future of Systems Engineering, FuSE? (FuSE Lead)
- What do working groups / initiatives do? (Technical Operations)
- What do chapters do? (Sector Directors)
- What is Certification, what is needed to achieve, number of years)? (Certification PM)
- What is the Professional Development Portal, PDP? (AscD E&T / PDP PM)
- What are the Services available to INCOSE Members? (Service Operations)
- What is the Corporate Advisory Board / Academic Council? (CAB Chair / Director of Academic Matters)

For some of these items, the Outreach Team may need to add updates to tailor to the event themes (e.g., the what does the SE Vision 2035 & FuSE talk about modeling & simulation, MBSE, digital transformation, etc.).

Also, through the MARCOM Promotional Merchandise Request Form (section 7.3.2 in our External Event process), several handouts are available. However, talking with past Event Ambassadors, additional handouts may be needed in the future.

The overall goal for these Event Ambassadors is to be professional and consistent, no matter which event is attended.

7.3.4 Outreach Ambassadors at INCOSE Exhibits / Booths

If Ambassadors from the Outreach Team are needed to “man” the exhibit / booth to discuss INCOSE, member benefits, etc., please contact the Outreach Director at outreach-director@incose.net. Depending on the size of the event, the number of people at the exhibit / booth per shift (set amount of time) will be determined. For many events, 2 people in 4-hour shifts work. Outreach will cover Event Ambassador travel and registration expenses.

The personnel assigned to the exhibit / booth will try to collect data to help evaluate the success of the event. The data to be collected includes the number of overall visitors to the booth, number of visitors with specific INCOSE interests, etc. This information will be included in the Event Summary Report (section 6.3.2).

8.0 Future External Events

8.1 Continued Participation in an Event

All the information obtained, i.e., the funding expenses (section 5.3.1), the Event Summary reports (section 5.3.2), the value from attendance, etc., will be reviewed to determine if the external event will be attended / supported in the future. If so, financial estimates will be made for the next budget and the results analyzed to determine if support should be the same, reduced, or expanded.

If there are plans to support an external event in the future from one part of INCOSE, that part will inform the other parts of INCOSE to determine if there any potential joint support plans for shared budgeting, shared participation, etc.

8.2 Future Considerations at INCOSE Exhibits / Booths

The following have been recommended for the INCOSE Exhibits / Booths at external events. For any of these considerations, the value to INCOSE with a cost-benefit analysis should be performed.

8.2.2 Electronic Tracking

An expensive option, but really needed and necessary.

- Recent conferences have charged anywhere from around \$350 to over \$800 to use their capability at the event.
- All conference events, worldwide, provide badges for identification and scanning.
- If you have the event badge scanner, you can quickly get all their registration information in a data friendly form.
- Capturing who visited for a follow up (even if it is just brochures) is usually the justification for supporting a booth. Although the folks at the exhibit / booth can get a few names, most attendees don't want to take the time to write down their information on a note pad.

8.2.3 Additional Handouts

If possible, "tailored" to the audience of the event.

- A handout list of CAB members.
- Information for discussion and a handout about what INCOSE Working Groups are all about. Something that explains the INCOSE Working Group concepts and all the options, benefits, and fun of being an INCOSE Working Group member.
- FuSE overview.
- SE Value Proposition.
- SE Vision 2035.

8.2.4 New Signage

A little less "academic" sounding, a little more grounded for the target audience (i.e., non-systems engineering).

- A few more recognizable things and information needs to be consistent.
- Somewhere the SE V-curve should be there.
- The order (ASEP/CSEP/ESEP) and qualitative characteristics or competency terminology (like “knowledgeable” or “independent practitioner”) associated with each level.

References

REF-1 INCOSE Policies

EVT-100 Event Committee Charter
EVT-101 Events

REF-2 INCOSE Procedures, Templates, and Forms

FIN-FORM-01 Travel Request Form
FIN-PROC-01 Expense Reimbursement Procedure
FIN-FORM-02 Expense Reimbursement Form

REF-3 Other References

INCOSE Events Webpage
(<https://www.incose.org/events-and-news>)

INCOSE Promotional Merchandise Request Form
(<https://app.smartsheet.com/b/form/7cf54a843a324093afc4b80ba7fb32a6>)

Marketing Campaign Request Form
(<https://app.smartsheet.com/b/form/0cbbdff532a14de196ba97fca1d981b8>)

New Event Submission Form
(<https://app.smartsheet.com/b/form/8755a0e866854485b7ffb8b9ec9aa02c>)