

INCOSE ANNUAL OPERATING PLAN 20XX

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1. Introduction

This INCOSE Annual Operating Plan (AOP) describes the planned activities funded by the INCOSE Budget in 20XX. The purpose of this narrative is to guide the activities through the year, and to ensure that INCOSE members understand the organization's priorities and how it intends to achieve them.

This 20XX AOP was created in the context of INCOSE's Vision, Mission, Goals, and Principles, as defined and promulgated on the INCOSE website. They are not repeated here but are reflected in this AOP.

To focus and guide our advancement as an organization are three Strategic Objectives (SOs), transversing five Value Streams (VSs). The three transversal SOs are –

- Premier – to be the premier choice everywhere for Systems Engineering professional development needs;
- Future - to lead the community in shaping the future of Systems Engineering;
- Value – to deliver ever greater value to a growing and increasingly diverse membership.

These INCOSE SOs guide policy and budgeting decisions. They are demanding and intended to allow us to make significant progress in evolving INCOSE. They are reviewed and refined on a regular basis as appropriate, in serving the execution of our mission and the achievement of our vision of “a better world through a systems approach”.

Augmenting these objectives are the five VSs of Certification, Events, Membership, Products and Training. By definition these VSs are a series of activities required to design, produce and provide a specific product or service for the overall benefit of INCOSE and its members. Both the SOs and VSs are further defined and promulgated on the INCOSE website. They too are not repeated here but are reflected in this AOP.

As an annual plan, the AOP is executed by the Budget Owners from the Board of Directors. Any deviation from the approved budget is reviewed and assessed by the Budget and Planning Committee (BPC), following policy, prior to appropriate action being taken.

2. AOP Structure

The AOP is structured in two main sections as follows, detailing the INCOSE 20XX operating and budgetary considerations –

- **Value Streams (VSs)** – encompassing-
 - o The products and services of Certification, Events, Membership (at two levels – individual and Corporate Advisory Board (CAB)), Products, and Training;
 - o Special Projects (SPs) which are specific, one-time projects known at the time of the writing of this AOP of which the output/outcome may result in supporting VSs or Shared Resources (SRs) activities in the future, guided by our SOs;
- **Shared Resources (SRs)** – detailing the Operational Support and Business' Support activities necessary for the running of INCOSE and the provision of shared support across the VSs.

3. Value Streams (VSs)

This section of the AOP focuses on the five VSs of Certification, Events, Membership, Products, and Training, and any special projects in-work or planned for 20XX.

<Guidance to Authors – For “business as usual” material, just summarize the information – a paragraph will do. Feel free to refer, by way of a URL, to the website, policy docs, etc., if the information is available elsewhere. The write up should focus on –

- Any new initiatives
- Any large investments.

Ensure the link to the strategic objectives or other value streams is evident where appropriate. You may add as many headings as appropriate below the headings provided (i.e. at level 3 or level 4 (if level 3 has been provided)).

Do not include any monetary values in the AOP.

It is anticipated that most write ups will be ½-1 page in total, unless there is much diversity under the parent heading.>

3.1. Certification

3.2. Events

3.3. Membership

3.3.1. Individual Membership

3.3.2. Corporate Advisory Board (CAB) Membership

Extensive work has been done in the area of the CAB needs. A CAB need is a systems engineering concern essential or very important to the collective CAB that requires some course of action by INCOSE to fulfill. A survey was sent out to all of the CAB members to identify and rank what the CAB sees as their current needs going forward. At the 2019 IW the needs were transformed beyond category statements to descriptions with each need being represented by a S.M.A.R.T (Specific, Measurable, Attainable, Realistic, Timely) goal.

CAB leadership will now work together with the Board and Tech Ops in allocating the needs across INCOSE's various technical Working Groups, monitoring the progress of resolving the needs and maintaining a communication conduit with the CAB. Each year the CAB organizations will be surveyed to determine whether additional needs should be included.

There are no significant new initiatives or items that would impact the budget as the CAB continues to grow and mature. Ongoing topics of discussion such as local CABs and Associate Member access do not require resources beyond time and attention from leadership.

3.4. Products

3.5. Training

3.6. Special Projects (SPs)

Detailed in the following subsections are the specific one-time projects either in-work or planned to commence in 20XX. The outputs/outcomes of each special project may result in supporting VSs or SRs activities in the future.

3.6.1. Volunteer Opportunities Project

3.6.2. Grand Challenges – Clean Water and Sanitation

4. Shared Resources (SRs)

This section of the AOP is divided into two sub-sections outlining the operational and budgetary considerations for –

- Business' Support – covering Administration and Organizational Leadership considerations; and
- Operational Support – encompassing the supporting activities of Academic Matters, Information Technology (IT), Marketing and Communication (MarCom), Outreach, Sectors, Technical Operations (TechOps), Services Operations (ServOps), and Sponsorship and Endorsements (SEs).

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- Any new initiatives
- Any large investments.

Ensure the link to the strategic objectives and value streams is evident where appropriate but do not repeat information already under the value streams.

You may add as many headings as appropriate below the headings provided (i.e. at level 3 or level 4 (if level 3 has been provided)).

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4.1. Business’ Support

4.1.1. Organization Administration

4.1.2. Organizational Leadership

4.2. Operational Support

4.2.1. Academic Matters

4.2.2. Information Technology (IT)

4.2.3. Marketing and Communications (MarCom)

4.2.4. Outreach

4.2.5. Sectors

4.2.5.1. Sector I - The Americas

4.2.5.2. Sector II – Europe, Middle East and Africa (EMEA)

4.2.5.3. Sector III – Asia-Oceania (AO)

4.2.6. Technical Operations (TechOps)

4.2.7. Services Operations (ServOps)

4.2.8. Sponsorships and Endorsements

This subsection identifies the operational and budgetary considerations related to –

- Sponsorship – for event related sponsorship only, at the international and regional levels and at the local level where appropriate;
- Engaged Sponsorship Support – for the provision of resources (funding or otherwise) to engage in the conduct of the event, meeting or activity in a manner that helps to meet the established goals. Examples include but are not limited to, taking an active role in the technical program through in-kind labor, providing mentoring or coaching, being a judge, offering the prize or award;
- Endorsements – for product, services or event related endorsements provided by INCOSE.

4.2.8.1. Sponsorships

4.2.8.2. Engaged Sponsorship Support

4.2.8.3. Endorsements

At this point in time INCOSE does not provide endorsements of third-party products, services or events.

A. Appendix A: INCOSE Memorandums of Understanding and INCOSE Memorandums of Agreement

The list of current INCOSE's Memorandums of Understanding (MOUs) and Memorandums of Agreements (MOAs) are provided below. These are managed by the Director for Outreach and are held on file in Connect at the following link:

<https://connect.incose.org/Organization/BOD/Pages/home.aspx?RootFolder=%2FOrganization%2FBOD%2FINCOSE%20Shared%20Documents%2FMemoranda%20of%20Agreements%20%28MOA%20and%20MOUs%29&FolderCTID=0x0120008803DF521D690A44A94800173BDA76DF&View={82EB27E9-2C56-4DE7-98AB-F77A9DAB8192}>

<Christine to check link>

Each MOU or MOA can be made available to non-members on request to <Christine to put in contact addresser link>.

<Christine/Andy to insert a table/list itemising the current MOUs and MOAs>

B. Appendix B: INCOSE Support Contracts

<To be updated by Christine>

The list of current INCOSE related contracts are provided below. These are maintained by the INCOSE Administration Office and are held on file in Connect at the following link:

<Christine to provide link>

Each contract can be made available to non-members on request to <Christine to put in contact address link>.

<Christine/Andy to insert a table/list itemising the current contracts.>