# INCOSE Technical Operations Working Group Chair Guide

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## INTRODUCTION:

Welcome to the INCOSE Technical Operations Working Group Chair Guide. Working Groups (WG) are the heart and soul of INCOSE, and the source of Technical Products, member engagement, and collaboration across the globe.

As an INCOSE WG Chair, you are a key individual with unique ability to connect people with common interests and align to a broader global community. The WG Chair organizes, administers, manages and facilitates diverse points of view operating within a broader INCOSE professional organization.

These introductory first pages ( Overview and Organization ) contain information and links you can use as a starting point and quick reference. The information can be found on both the INCOSE public web site (www.incose.org) and Technical Operations Connect site accessible from the public site. The latter is also an online discussion forum for WG Chairs to exchange information among Technical Operations and other Working Groups. The Technical Operations Associate Director for Internal Operations is responsible for maintaining and updating information found on this page.

*Note: Some of the hyperlink reference contained in this document are located within the INCOSE Connect system. To utilize these hyperlinks, you may need to copy the link; log into INCOSE.org and Connect, and then paste the link in to access the material.*

## OVERVIEW:

INCOSE Overview and Strategy Links

Two main deliverables of Technical Operations (TechOps) are impactful products and state-of-the-art research. From the INCOSE public home page, a title guides viewer to the individual Working Group (see Working Groups under the Technical Products banner) pages which then provides supportive information and guidance for engaging with a Working Group.

An INCOSE Working Group is not aligned nor associated with INCOSE Member Chapters, the CAB organization, or the Sector(s) Membership Management. WG members can be from any location in the world regardless of their local chapter affiliation. Anyone desiring to join one or more working groups only needs be a full member of INCOSE and submit an informal request to the WG chair to join. However, opportunities for outside experts, Subject Matter Experts (SMEs), or members from other professional organizations to help a WG project are welcome and should be noted in the WG Technical Product Plan (TPP).

Other recommended Overview and Strategy links are:

- INCOSE Vision, Mission and Goals -
- INCOSE Strategic Objectives
- INCOSE Values & Principles
- TechOps Culture Statement - (requires initial access to Connect)


These links provide additional high-level guidance to help WG leaders guide and tailor the work and outputs of their WG.


## The INCOSE Organization


Understanding the INCOSE Organization is a key component to success. Knowing the people and roles of the INCOSE management team is important, and their direction can aid in goal and funding decisions for your WG. Knowing and leveraging the resources of INCOSE, including working and information storage worksites (available only to your WG) is also key. Finally, INCOSE, like many other volunteer organizations, relies heavily on strong communication between its members to be successful. It greatly helps a WG Chair to know who is responsible for what, how to find them (see the Working Groups link below), and how to contact them.

Additionally, a WG chair needs to understand the current structure of TechOps including the logical organization of WGs and TechOps Initiatives.

The current organizational structure of TechOps is also described in the following links, providing background on the logical organization of WGs and TechOps Initiatives.

- INCOSE Leadership and Organization
- INCOSE Committees
- INCOSE Working Groups
- Working Group Sites
- Organizational Sites

## OPERATION:

### Technical Operations Business Rhythm

Working Groups and their activities are guided in large part by the INCOSE activities occurring during the year. The TechOps Business Rhythm is an established set of annual activities to maintain technical activities through events and products tied to INCOSE Strategic Objectives and the INCOSE Annual Operating Plan. A major component of the Business Rhythm is the development and execution of the Technical Operations portion of the INCOSE Annual Operating Plan (AOP). Figure 1 below depicts the key elements of the annual TechOps Business Rhythm.

| | Jan – Mar | April – Jun | Jul-Sep | Oct – Dec |
|---|---|---|---|---|
| **Events** | At the International Workshop (IW)<br><br>Yearly WG plan developed and started | WG and Regional Events | International Symposium (IS)<br><br>Attendance and networking with other WGs | WG and Regional Events<br><br>Prep for IW in January |
| **Budget** | Quarterly spend reports | Quarterly spend reports | Draft budget creation and submission for next year<br><br>Quarterly spend reports | Final next year's budget approval<br><br>Quarterly spend reports |
| **Submissions** | Updated WG Information Sheets<br><br>IW resource plans (rooms/dates) submitted | Plans for SE Journal and/or Insight submissions | IS papers/presentations of papers/presentations developed during the year | IS papers / panel / tutorials due in November<br><br>IW articles and plans readied |

*Figure 1: INCOSE Technical Business Rhythm Chart*

As shown in the Business Rhythm chart above, TechOps and Working Groups are active throughout the entire year. The events row in the chart shows the two major annual events (IW & IS). The events are to prepare for IW and IS events as well as developing/reporting on the WG budget activities and group achievements.

As a WG Chair, you are requested and should expect to attend the "TechOps WG Chairs & Assistant Directors" monthly telecon on the third Monday of each month. This is currently a Zoom meeting and held from Noon-1 PM Eastern US time.

## The International Workshop (IW)

The TechOps organization is responsible for the hosting and direction of the International Workshop (IW). The IW event is dominated by the Working Groups business and planning meetings, along with other INCOSE organizational, business and planning events. The WG chairs are often directly involved in these events, especially when sharing of information and co-hosting of sessions is required. It is the premier WG networking event, and WG chairs, co-chairs and all members are encouraged to attend.

The WG Chair is responsible for assuring that their WG members and potential new members are clearly informed as to the WG activities planned for an IW. The Chair (with designees as needed) should lead the effort to plan what activities and events the WG will conduct during the IW. The Chair will coordinate dates and times for meetings at the IW, coordinate the needs/sites/access for web attendance, identify who will be attending, and establish expectations for any meeting/sessions for the WG while at the IW. INCOSE is striving to provide state of the art remote/web/video access tools, enabling the WG Chairs to ensure that all team members can participate in any meeting. INCOSE hosts a website for the IW and IS event (https://www.incose.org/events-and-news) which, aside from listing all INCOSE wide events, contains links to the yearly IW and IW events. Drilling down on the event links will provide you with virtually all the IW attendance information, including hotel, event reservations, schedules, topics, and registration. WG members can also download the INCOSE event application ("INCOSE events" in the Apple or Android apps stores), which is very helpful for planning your schedule as well as facilitating participation and feedback during the event.

The monthly TechOps meetings leading up to an IW is where the WG chairs and TechOps leaders discuss the administrative and operations aspects of the forthcoming IW. Most major planning is completed by November, so you should plan accordingly.

The IW program schedule and updates are usually discussed at the TechOps Leadership and Monthly teleconferences. Establishing your IW plan early will help facilitate overall conduct of the IW (conference room, teleconference scheduling, joint Working Group meetings, etc.). The WG chair (or designee) is also responsible for coordinating with fellow WG Chairs during IW preparation to help facilitate Working Group to Working Group collaboration. The domain of your working group (Transformational, Analytic or Process) may help define how your WG interfaces and interacts with the other WGs. Releasing a WG introduction video or short narrated presentation is strongly encouraged to aid in WG outreach prior to the IW.

One of the key activities at IW is for your WG to discuss ideas and develop plans for the coming year with the group. Part of your discussion and planning should include checking your budget planning and if it will still accomplish your objective. A common source of needs for WGs to address may originate from the Corporate Advisory Board (CAB), with specific priorities shared during IW. The WG chair addressing a CAB need is typically invited to CAB meetings partnered with a CAB representative for updates.

During the IW, existing and new Working Group Charters must be reviewed and updated before the close of the IW. These updates become part of the WG Information Sheets so that all INCOSE members are aware of the scope, depth and focus of all the WG activities. The WG Chair should be prepared to summarize the WG activities during the year, and present at the closing session of the IW.

## The International Symposium

The International Symposium (IS) is the premier annual INCOSE event. Historically, the Symposium is a Saturday to Tuesday event, with multiple activities before and after the normal schedule. For example, WG Chairs should make every effort to plan for participation in the INCOSE Strategy Session (typically the Friday before the IS) and the TechOps WG Leadership session and luncheon (typically Saturday before IS). The INCOSE Events Committee is responsible for the IS program, and this includes developing the IS Program Tracks. As a Working Group Chair, you can expect to be involved with Technical Operations inputs to the IS program development. These inputs may be discussed at monthly Technical Operations teleconferences, or during special activities and sessions called for by the Director of Technical Operations. As a Working Group Chair, you will want to keep abreast of IS planning and represent your Working Group as needed. WG leaders are also encouraged to serve as Session Chairs / Hosts for tracks within the IS activities that align with their WG focus. The TechOps Technical Events Assistant Director and the IS Technical Program team work together with the Events team to fill these roles.

The Symposium is the major INCOSE event for paper and talk presentations. Working groups may offer papers and presentations, although most are done by individuals who may or may not be part of a WG.

Soon after IS, the budget request cycle for the upcoming year is starting. WG Chairs will be asked by their TechOps Assistant Director to provide their budget request for next year. These budget requests typically include travel expenses for non-INCOSE conferences, resources needed for WG products, etc. Please make sure that some budget is allocated to your WG and be aware that your Assistant Director is given some contingency for unexpected expenses. In case no budget is allocated to your WG and an opportunity that brings value to INCOSE is identified, please get in touch with your Assistant Director. In most cases, there are possibilities to reallocate budget to get funding for those unexpected opportunities.

## POLICIES AND PROCEDURES:

### Technical Operations Policies and Procedures

INCOSE Policies and procedures are actively managed by the INCOSE Policy Management Committee (PMC). Currently approved INCOSE policies, templates, and RACI[1] for the PMC can be found through the main INCOSE Connect page. You should become familiar with the approved policies and specifically the "TEC" policies which govern Technical Operations. TEC policies provide information on Technical Operations Infrastructure, Technical Products, and Standards.

### Infrastructure

In support of the Working Groups, INCOSE provides resources to enable collaboration, inclusive of web-meetings as well as on-line information sharing for WG members as well as to interested non-members. Free GlobalMeet or WebEx conference services may be reserved at the on-line INCOSE Connect site. From the Connect main bar, click on Help and then click on "Webinar Services". Additionally, several ZOOM conferencing accounts have been established for each TechOps WG Domain and Assistant Director areas. Please contact your Assistant

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[1] RACI is the determination and assignment of those who are Responsibility, Accountable, Consulted and Informed about the groups activities.

Director for the relevant user / password information as these accounts are 'self-service' using the Zoom account's scheduling feature to prevent meeting conflicts.

The public facing WG Website is maintained by the WG chairs or their delegate with the assistance of the central INCOSE administration team, currently using INCOSE Web Services instructions. Requests for help are also received at that location.

Your internal INCOSE WG Connect site may be managed via your INCOSE Member Profile from the main INCOSE.org site. Your team members should know how to access your WG page within the site. To access the WG connect site, sign into the Connect section of the INCOSE web site. After logging in, click on the "Collaboration Portal", which will take you to the Connect site. From the title bar, click on the "Working Groups" button. A list of WG titles will be displayed. Select your working group, and the appropriate web page with a section box on the left will appear. If your user information is allowed to make changes, then select the needed option and you can add/edit/delete as desired.

<div align="center">Project Tracking and Funds</div>

WG chairs are responsible for updating their WG charter, project plans, WG information sheets (WIS), IW resources request, and funding requests. Charter updates, project plans, IW request, and yearly budget request are submitted annually, just before the IW event for that year. An updated WIS is expected immediately after the IW event in order to record the update/changes made during the meeting.

- Charter updates can be done on-line, through the connect portal. There is a standard format to updating/creating a charter and is located in the 20xx TO Materials Documents folder  (Materials) . It must be submitted to the Director of Technical Operations (or designee).
- Project Plans (known as Technical Project Plans or TPP) have been moved to an on-line system within Connect and it can be found on the main INCOSE Connect page under the "Online TPP" Rocket Icon or directly through Connect (Connect/Organizations/Technical Operations). Instructions and examples can be found on that site.

- WIS sheets are currently an online-form enabled PDF document with the format updated for each IW. It is important to keep the Charter and WIS aligned, and the intent is to combine these two documents in the future.
- IW request includes meeting rooms, facility setup and other resources for the IW event. This is currently an online process enabled by the events team associated with each IW event.

## Membership and Knowledge Sharing

As a WG chair, part of your responsibility is to lead the growth and impact of your Working Group. To that end, you are encouraged to designate a group member(s) to advertise your WG existence, solicit new members, and keep your INCOSE WG websites (public & internal) with the WG activities updated and current. In particular, ensure that several members have knowledge of any access controls/passwords necessary for the WG members to access your network sites as a backup when the primary content editors are otherwise occupied.

WG Chairs also have the responsibility to encourage knowledge and document sharing as much as possible. Encourage posting of working papers, relevant documents, and even industry/association information on your WG sites.

## Technical Products

Technical Products developed by INCOSE Working Groups are a key component of INCOSE value across the worldwide community. Because of the importance of Technical Products to the INCOSE value proposition and business case, special attention is given to the recognition and protection of Intellectual Property to the contributing members. As a Working Group Chair, you will want to become familiar with INCOSE policies that govern technical products. ADM-103: Intellectual Property, found here is a good starting point.

WG Chairs must be aware of the provisions found in INCOSE Procedure TEC-PROC-02 which provides assistance in determining the IP, branding and technical review needs for a project/product before the significant volunteer time is spent.

Assistance in creating technical products can be found in the INCOSE TEC-107 policy "Technical Product Development and Commercialization".

Any INCOSE Technical Product shall start with creating a TPP. As we're all Systems Engineers we understand and value the concept of frontloading before committing volunteer labor to a project. Please make sure that you have submitted a TPP via the online tool and received approval on your TPP before starting the project.

## Awards

As a leader of volunteers, WG chairs should be aware of special efforts by the team members and take advantage of the INCOSE reward/recognition programs. Recognition awards are governed by INCOSE "REC" Policies and can also be found at PMC links above. REC-109: Working Group Awards, is one policy you will want to become familiar with as a Working Group Chair.

WG Chairs can self-nominate their own WG in up to four areas, self-nominations in more than one area are allowed.

The WG awards are submitted in September/October to allow for Board of Directors review in November,  and the subsequent presentation at the next IW.

## Best Practices

Finally, as a Working Group Chair, you will be able to observe a variety of practices implemented by successful Working Groups. These include advance preparations for IW and IS, budget planning and execution, member engagement and product development. Looking around at other INCOSE Working Groups, you will be able to recognize these best practices and adopt for your own style and Working Group membership. Please inform the Associate Director for Internal Operations with any improvement proposals so that the WG Guide content may be improved.

## QUESTIONS:

As a function of this Working Group Guide page on the INCOSE Technical Operations Connect site, the General Discussion section Questions is a place where WG Chairs can ask questions and collaborate on any subject including best practices. Contacting any of the Technical Operations Assistant Directors or coordinators is expected and welcomed if you have any questions or issues.

## CONCLUSION:

As a Working Group Chair, you are serving in a key role for Technical Operations and all of INCOSE. Leading a WG can involve a great deal of work, but can also be highly rewarding both professionally and personally. Remember that you are leading a technical team and you help in providing guidance and leadership will help the team be successful. The TechOps organizations exists to help you and your working group in any way we can, so please don't hesitate to ask for help, advice and funding to make your WG efforts successful.

Good Luck!