



## **Guidelines for INCOSE UK Local Groups**

**Prepared By**

**Ian Gibson (Communications Director)**



## Guidelines for INCOSE UK Local Groups

### Version History

Version	Date	Author	Changes
1	March 2003	D Cowper	First issue
2	July 2009	I Gibson	Corrected terminology from regional groups to local groups. Updated event and committee guidance to reflect experiences running local groups over the past five years. Event organisation checklist added. Harmonised with UK-FIN-101, "INCOSE UK Chapter Local Group Funding & Governance Policy". Final updates following UK Board review prior to formal issue.



## Guidelines for INCOSE UK Local Groups

---

### Contents

1	Summary .....	1
2	Introduction.....	2
3	How to Organise a Local Group .....	2
3.1	Steering Committee .....	2
3.2	Commitment from Organisers .....	4
3.3	General Group Administration .....	4
3.3.1	Steering Group Meetings .....	4
3.3.2	Annual General Meeting (AGM).....	4
3.3.3	Maintaining Records.....	5
3.3.4	Affiliations with Other Professional Groups .....	5
4	Relationship with INCOSE UK.....	6
5	Group Membership .....	7
6	How To Organise Events .....	8
6.1	Annual Programme .....	8
6.2	Meeting Types .....	8
6.3	Speakers / Topics .....	9
6.4	Visits .....	10
6.5	Venues.....	10
6.6	Funding events .....	11
6.7	Times and Durations .....	11
6.8	Social Events.....	11
6.9	Event organisation checklist .....	12
7	Advertising & Communications .....	13



## 1 Summary

A local group is a way of expanding the benefits of INCOSE membership, and promoting the discipline of Systems Engineering and the UK Chapter.

**What does Systems Engineering get out of it?** Well run local events send a clear message that Systems Engineering is a professional and active discipline, and that INCOSE is the place to go to find out about it. We can also use these events to encourage new members to attend national events or to join the chapter.

**What do members get out of it?** Attendance at a local group has the obvious advantages of the events themselves. There is also the opportunity to meet other members, or interested non members, in your local area.

**What do the organisers get out of it?** Helping to run a local group is a simple way to get more involved in the UK chapter, in a way which limits the commitment of your time. For many of us, helping out at a local group is interesting, and even fun, and is rewarding in its own right. This can also be a way to get involved in activities related to your professional development and to make contacts which are useful to yourself or your employer.

**What do local groups do?** The typical activities of a group are:

- To hold 4-6 free local events each year, open to both INCOSE members and non members.
- To try and make at least one of these events a joint event with a local chapter of another society or organisation (optional).
- To write articles based on local events for Preview or other publications.
- To hold one visit or social activity per year for local members
- To help organise at least one UK chapter event in their local area (optional)

**What do local group organisers have to do?** The minimum commitment is to help organise at least 1 local event, as part of an organising community. This will typically involve attending a planning meeting, and doing a few hours work to find speakers, write a poster, etc. If you want to do more you can help to run the local group, or get more involved in UK chapter activities in your local area. As INCOSE is a non tax paying volunteer organisation, volunteers need to be able to find the time and expenses to attend meetings. Some financial support is available organisers incur additional expenditure, and to support refreshments at events etc.



---

## 2 Introduction

The purpose of the local groups is to provide a local forum for networking, supporting professional development and to socialise with like-minded people, whether they are members of INCOSE or not.

This document presents guidelines for managing a local group associated with the INCOSE UK chapter, and should be read in conjunction with the document UK-FIN-01 - “INCOSE UK Chapter Local Group Funding & Governance Policy”

The document was prepared as a guide and it is recognised that each group will still develop new ideas and maintain its own identity. It is not intended to be rigidly followed or to prescribe how groups should work, but to provide help in getting local groups up and running.

The purpose of the document is:

- To provide guidance for new groups and new organisers
- To provide a template which aids further development and improvement

The guideline provides sections on the following:

- How to organise a local group
- Group membership
- How to organise meetings
- Advertising and communicating

## 3 How to Organise a Local Group

### 3.1 *Steering Committee*

A steering committee must be formed to take responsibility for the organisation of the group activities. If possible the committee members should be from different organisations from across industry, government and academia. This spreads the commitment and reliance on individuals who will have their own time pressures and constraints. This committee is not required to meet physically on every occasion and can discharge its duties through virtual meetings (conference calls, via the web etc.). However, it is highly recommended that meetings during the formation of the committee, and when establishing the forward programme of events for the next year (usually running from September to May) are face-to-face.



## Guidelines for INCOSE UK Local Groups

---

The following roles are recommended:

<b>Role</b>	<b>Responsibilities</b>
Group coordinator	Organise and run the group, ensure all tasks / actions are undertaken, provide additional support to other committee members where necessary, develop further links with other local professional groups, introduce speakers, present the word of thanks (unless the meeting organiser does this).
Treasurer	<i>(taken from UK-FIN-101 V2.1)</i> The LGT is responsible for any financial matters relating to the group; collecting monies, paying bills, accounting for any funds supplied from INCOSE UK etc. The LGT must prepare an annual financial report at the end of each financial year (31 May) to account for income, expenditure and propose a budget for the following year. This report must be forwarded to the INCOSE UK Finance Director. Requests for funding or any financial issues should also be documented and brought to the attention of the INCOSE UK Finance Director
Event Organiser(s)	Determine forward event programme with the rest of the committee, find speakers and venues, gain sponsorship if applicable, organise refreshments.  It is recommended that events are allocated to pairs of individuals (one lead and one in support). All steering committee members should act as event organisers at some point during the year.
Communications	Maintain database of local group attendees. Advertise meetings (posters, emails, web, INCOSE UK Newsletter), collate the annual programme, undertake mail shots, scan local papers / specialist press for articles relevant to Systems Engineering and feedback information to INCOSE UK. Produce web page content for the local group area of the INCOSE UK site.



## **3.2 Commitment from Organisers**

It is recognised that a certain degree of commitment will be required from members of the steering committee. They will also need some flexibility from their employers, especially as some activities may need to be undertaken during standard office hours.

Although the commitment is voluntary, there are benefits from being an organiser, for example:

- Greater visibility within the Systems Engineering and other communities;
- Development of new business and social contacts;
- Opportunity to work alongside other Systems Engineers;
- Development of organisational and team skills.

It is suggested that each volunteer ‘signs up’ for a specified period, e.g. 2-3 years, with the option of continuing if they wish. In practice this means that the committee needs members who are able to commit to playing an organising role in 1 event per year, attending 1 planning meeting plus the event (and the AGM).

## **3.3 General Group Administration**

### **3.3.1 Steering Group Meetings**

It is recommended that regular meetings be held outside the organised events. The frequency of these meetings will be determined by the event programme, and it is recommended that they are held four to six weeks before each event to provide the opportunity to deal with any changes to the programme. The group co-ordinator will act as chairperson and will prepare issues for the agenda.

A suggested agenda might be:

- Review of feedback from the previous event.
- Review of outstanding actions and issues for the next event.
- Planning for future events.
- Co-ordination activities with INCOSE UK and other professional groups.
- Any Other Business.

### **3.3.2 Annual General Meeting (AGM)**

One of the events during the year could take the form of an annual general meeting to which all group attendees are invited. The purpose of the meeting is to review the previous years’ activities and gain ideas for the next programme.



### 3.3.3 Maintaining Records

The most important records to keep are the contact details of the attendees! An electronic database is the easiest means of doing this, but does need to be covered by the Data Protection Act. The simplest way of doing this is to maintain the details in a spreadsheet, with a master contact details sheet doubling up as the registration sheet, and a sheet for each event to capture feedback. It is useful if the registration sheet captures whether an attendee is an INCOSE member or not to enable analysis of group composition. An example of the spreadsheet used for the Bristol Local Group is available on request. This database shall be maintained by the communications organiser.

General notes and / or presentation hand outs for events are worth keeping avoiding unwittingly duplicating the same topics year after year, to provide more details of the meeting if required for CPD purposes, and to help generate new ideas from the organising committee.

### 3.3.4 Affiliations with Other Professional Groups

There are a vast number of local groups for different professions, many of which are relevant to Systems Engineering, e.g.

- The Ergonomics Society;
- Institute of Engineering and Technology;
- Institute of Measurement and Control;
- Institute of Mechanical Engineers;
- Association for Project Management;
- British Computing Society, etc.

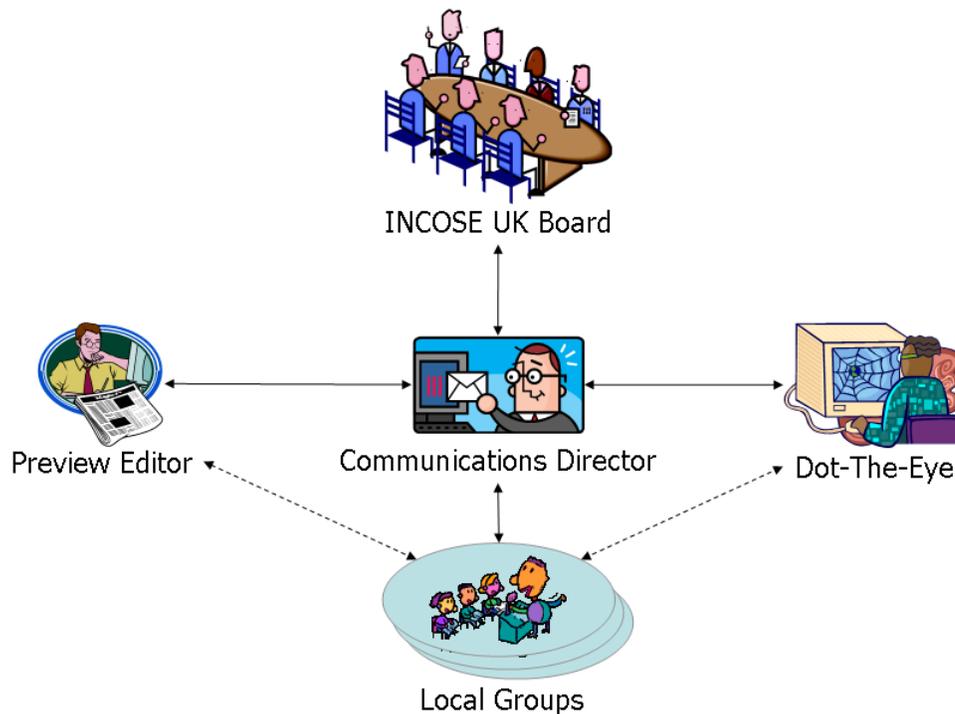
The benefits of liasing with them are as follows:

- Relevant events can be mutually advertised (this is quite simple via email);
- Attendees can be kept abreast of what is going on in the area and help to raise the profile of systems engineering and the local group;
- Attendees can network with other professionals.

There may be occasions where it is appropriate to hold a joint event with the local branch of another professional group. This has proved to be a successful model with the Bristol Local Group holding joint events with the APM. For these joint events it is particularly important to do a professional job, and it may be necessary to take a strong lead so that organisational elements do not get inadvertently missed out.

Contact details can be obtained from the national offices which advertise in the professional press, yellow pages, trade exhibitions and conferences. Also local groups often know a number of other groups as well.

## 4 Relationship with INCOSE UK



Local Groups are expected to provide feedback into the INCOSE UK Chapter Board, keeping them informed of events that they have run, and other pertinent issues. This is to be provided to the INCOSE UK Communications Director, ideally in a form which can be re-used to go into articles about the local groups in Preview. Local Groups are encouraged to provide forward programmes of events, and reviews of events that they have put on, to encourage more members to attend local groups or form one of their own.

Local groups are also expected to provide details relating to the running of the group itself to the Communications Director on a quarterly basis. This is to include:

- Attendee numbers at each event (including proportion of non-members);
- General trends in attendance (do people come back?);
- Expenditure
- Future plans
- Opinions on speakers and popularity of events.



The INCOSE UK Secretariat (provided by Dot-The-Eye Ltd) is under contract to supply a variety of administrative functions, some of which can provide direct support local group activities:

- Publicising local group events on the website;
- Sending out flyers by email to INCOSE members in the local area;
- Handle event bookings if the local group is unable to find a free venue. This would need to be pre-arranged and authorised in advance. **It is recommended that local groups avoid charging for events (other than when hosting national one day events) as it adds an extra bureaucratic burden.**

The Preview Editor, supported by the Communications Director, regularly publishes details of future local group events and reviews of previous events. Publication deadlines are available on request, and articles are always welcome.

## 5 Group Membership

There is no requirement for local group attendees, or organisers, to be INCOSE members. As INCOSE UK is providing some financial support, the local group activities need to be seen to provide benefits to the INCOSE membership or to the wider discipline. Within that broad remit, local groups have freedom to run event which suit the local needs.

INCOSE UK has an aspiration to encourage new members to join the chapter. The local groups have a role in encouraging new membership through the following:

- Developing associations with other professional groups in the respective area and advertising meetings to their members
- Contacting organisations / specific departments inviting people to attend meetings
- Raising opportunities for membership at meetings

At a local level, it is not only important to develop a set of regular attendees, but also to keep them coming back! An important step in achieving this is to understand what the attendees (both members and non-members) want from the group, and how the group can improve. Members have a variety of requirements from the local group events, with the most notable tending to be the need to widen their own knowledge and to socialise with other members.

It is recommended that the organising committee ask the views of their members as an ongoing informal process, and periodically (e.g. annually) obtain structured feedback, for example using a questionnaire.



---

## 6 How To Organise Events

This section provides guidance on how to organise events for the group. It includes information about event types, topics, venues, socials, sponsorship, timings and durations. There is benefit in sharing experiences with other local groups to find good speakers and events which have worked well.

### 6.1 Annual Programme

It is recommended that local groups prepare an annual programme which can be circulated to members (and other professional groups) well in advance of the events. The benefits of doing this are to raise visibility of the group's events and to enable people to forward plan their diaries. The drawbacks include making late changes after the programme has been published and the forward planning and commitment required from all those involved. If changes have to be made to the published programme then it better to keep the date and change the event content, as attendees will usually have planned their attendance around the published date.

An annual programme will need to include:

- Event dates and times
- Topics / speakers
- Venue addresses
- Contact details for further information

The local groups are expected to organise at least four events per year.

### 6.2 Meeting Types

A variety of meeting types have been used in the past with varying degrees of success. The most typical format is to have one or more speakers, followed by a group discussion, with the opportunity for attendees to carry on with a social gathering afterwards. It has been found that a good speaker providing a reasonably in depth treatment on a subject can be preferable to having three lesser speakers skimming over a set of subjects, unless those subjects are tightly intertwined.

Industrial visits are usually quite popular and retain a 'fun' element to the meeting, but the numbers are normally limited and the organisation is often slightly more onerous, particularly if transport is also being arranged.



Workshops, seminars and drop-in clinics are enjoyable and good debates normally arise. However, they do not always appeal to everyone, and non-Systems Engineers may feel a little over shadowed, dependent on the topic or level of detail of the discussion. A good technique is to have a scene setting presentation, followed by breakout sessions with syndicate groups working through a structured set of questions, with a facilitated feedback session at the end to ensure that the feedback from all groups is heard.

Another successful form of meeting is having a presentation at a venue where the venue itself is of interest, for example the design museum. Some cost may be involved with this type of meeting.

It is recommended that a variety of meetings types be held, with a mixture of events aimed at both experienced and less experienced systems engineers.

### **6.3 Speakers / Topics**

The choice of speaker and topic will determine the type of audience who will turn up to the event. Thankfully, many members tend to be interested in a variety of topics and will attend an event even if it is not specifically related to their work area. However, the topic does require some thought depending on the membership of the respective group, what interests have been expressed and also to some extent what the organisers are interested in organising. The following is a list of questions which may help organisers to decide on the topic:

- What are the stated interests of the members? (Refer to the annual questionnaire feedback).
- What are the ‘hot topics’ of the moment? (e.g. congestion charges, rail crashes, air traffic control problems).
- Are there any local issues? (e.g. maintenance of the suspension bridge, town centre traffic layout systems)
- Are the members of the group primarily Systems Engineers, other professionals or a mixture?
- What level will the topic need to be pitched at (technical, general or somewhere in between)?
- Who might be available to give a lecture / talk?
- Who might be able to host a visit?
- Might we be able to persuade a company to host a lecture / visit, and thereby have the venue provided? (In which case the topic might not be down to choice).
- Are there particularly good speakers / topics which have been successful for other local groups?



An abstract will need to be prepared for the meeting to give members a flavour of what to expect. For lectures, speakers are normally asked to provide this.

## **6.4 Visits**

Visits are likely to require slightly more effort to organise due to travel arrangements and the need to liaise closely with the host. It is normally the case that numbers are limited on visits so gaining responses from the members will be important.

It is important to ask about specific requirements prior to advertising the event, such as maximum numbers, provisions for people with disabilities, duration, programme, personal protective equipment, special warnings, and do's and don'ts, and to advertise these to the members.

Members will need to be at the venue at the required time. It may be necessary to tell members a meeting time well before the actual start time to avoid disappointment and upsetting the host.

If the visit / tour is likely to be a 'normal' general public tour, members should be advised as such so that questions from them can be pitched at the right level. It can be embarrassing for the host / other members if a detailed technical question is posed to a tour guide without the knowledge or access to a relevant answer. If desired, such discussions between members can be held in a bar afterwards.

## **6.5 Venues**

Wherever possible, it is suggested that low cost options be pursued. This saves handling money or fund raising, either of which requires the money to be accounted for properly. Low cost options include:

- Finding a venue where no fees are required, for example the premises of one of the members. University campuses are a good place to start as they will often have rooms available in the evenings.
- Asking companies to host an event (there may be a marketing angle from the company, which is to be expected).
- Host a joint event with another professional group.
- Search for bars / public houses which offer free facilities (naturally, the owners will expect the members to have a few drinks, which also encourages socialising).
- Organised visits.

There are many advantages to finding a permanent home for the local group, and holding events at regular times (for instance, the Bristol Local Group has an event on the last Wednesday of every other month, usually held in the same room on the UWE campus).



If a regular home cannot be found, you will need to take extra care over advertising, directions, etc.

It is customary to offer tea and coffee to members on arrival and / or after a lecture if this is not already provided e.g. adjacent bar, host provides refreshment. This will need to be organised prior to the event.

### **6.6 Funding events**

Traditionally, local group events have been free to all attendees and held in venues which are made available at no cost from the parent organisations of members of the steering committee. Where a free venue is not available, it may be possible to raise sponsorship for the group, by offering some form of advertising in return. Sponsorship presents more options to the group and could be used to provide buffet meals, different venues, or different activities. All contributions should be acknowledged, even if it is just including company names on the annual programme or circulars.

INCOSE UK has allocated a budget of £250 per financial year to support each local group and will reimburse justifiable expenses (refreshments, room hire, etc) where these cannot be borne by an employer and valid receipts are provided. The funding policy for local groups is fully defined in the document UK-FIN-101, "INCOSE UK Chapter Local Group Funding & Governance Policy".

### **6.7 Times and Durations**

The most popular time to organise an event tends to be during the evening on weekdays (except Fridays) as not everyone is able to get time away from work for daytime events. Specific times would be a matter of asking members, but 6.30pm for a 7pm start allows for travel time for people who do not work in the immediate area.

Lectures in the evenings are ideally limited to 1 hour maximum, with up to 30 minutes question / answer time. In practice, the members themselves will determine how long the questions continue. Drinks after the meeting promote further discussion and networking. The host will often determine the times for visits. However, it is worth considering whether further discussion may be wanted after the visit.

### **6.8 Social Events**

This is dependent on the wishes of the group, but socials which allow people to circulate offer flexibility to the members, for example, refreshments after lectures, buffets, cheese and wine parties or meeting in a bar. From other organisation's experiences, members tend to prefer a lecture with social, rather than just a social on its own.



### 6.9 Event organisation checklist

The following checklist, with suggested deadlines and allocations, may prove useful when organising events and allocating responsibilities amongst the steering committee

<b>Task</b>	<b>Deadline</b>	<b>Responsible Member</b>
<b><i>Standard Tasks</i></b>		
Identify topic title & write summary.	At least 4 weeks prior to the event.	Event lead
Arrange & host speakers.	At least 4 weeks prior to the event.	Event lead/deputy
Prepare & send out publicity – both directly to attendees and geographically local members by email, and to the Preview Editor.	2 weeks before the event for direct emails and posters. Coordinate with Preview Editor regarding ePreview and Preview deadlines.	Communications role
Arrange facilities.	At least 4 weeks prior to the event would usually be prudent.	Member with links to the hosting venue.
Provide laptops for speaker presentations.	On the day.	Member with links to the hosting venue.
Post directions at the venue to guide attendees to the meeting room.	1 hour before the start of the event.	Whoever will be available at the time.
Write up event and send to Preview Editor and Webmaster.	Within 4 weeks of the event.	Event lead/deputy.
Send thank-you to speakers.	Within 1 week of the event.	Event lead/deputy.
Send out feedback request and compile responses.	Request to be sent out within 1 week of the event taking place.	Communications role
<b><i>Non Standard Tasks</i></b>		
E.g. Arrange flipcharts and pens.	On the day.	Member with links to the hosting venue.
E.g. Arrange refreshments such as bottles of water for an afternoon workshop event.	On the day.	Whoever will be available at the time.



## 7 Advertising & Communications

Contact details for INCOSE UK members are available from the INCOSE UK administrator, where members have agreed to make them available. Contact details for non-INCOSE members will need to be obtained by asking for such details when interest is expressed and by keeping an attendance sheet at events.

It is important to ask people if they object to their details being held on an electronic database to comply with the Data Protection Act. Attendees should be informed that their details will only be used for the purpose of the local group. By far the easiest method of communicating with attendees is via email. However, failing this postal addresses, fax and telephone numbers should be collected. **When sending out emails to attendees, always use the bcc field, and always include a disclaimer explicitly stating that they can reply to the email if they wish to be removed from the list.**

Events and other matters can be communicated via the INCOSE UK web site ([www.incoseonline.org.uk](http://www.incoseonline.org.uk)) and / or newsletter. Other professional magazines and web sites might also be considered. As a general rule, a flyer needs to be sent out to all previous attendees and other interested people two weeks in advance of the next event. This flyer should be sufficiently eye-catching to stand out on a notice board in a place of work (often located in the kitchen), and should contain the following:

- Local group name (and logo);
- Event title;
- Short description of the event, preferably including the name and affiliation of any invited speakers;
- Date and time of event (e.g. 6.30pm to 7pm start);
- Location, including room details;
- Where to meet (if different from the event location);
- Where to park;
- Standard INCOSE UK small print (as per the A5 promotional flyer).

Having affiliations with other professional groups allows events to be advertised to a much wider audience. Event adverts can often easily be circulated via email by dealing with the respective group programme secretaries. If, however, you wish to be included in the annual programme of other groups, it is necessary to determine when it is published (normally at least a year in advance). Groups typically run their programmes from September to May.