Metrics Action Learning Team
UCAR 2006 Leadership Academy

Jothiram Vivekanandan, Mike Turpin,
Dave Maddy, Jeff Lazo, Deirdre Garvey
Alex Eschenbaum, Clara Deser, Bob Barron
Andy Churgin, Coach

June 8, 2006
Overview

- Action Learning Team Process
  - Challenges
  - Lessons
- Metrics Implementation Plan
  - Introduction
  - Considerations
  - Content
  - Process
- Summary
- Questions
- More detail in Metrics ALT Report
Action Learning Team Process

- **Challenges**
  - Struggled to define and focus topic
  - Strength Deployment Inventory makeup of group
  - Rotating roles
  - Diverse backgrounds in team
Action Learning Team Process

- Lessons
  - Diverse backgrounds in team
  - Team process needs to be tailored for each situation (topic, group makeup, etc)
  - Importance of keeping an eye on the process
  - Team collaboration tool (e.g. SWIKI)
  - The “clunk” of consensus
Towards a Metrics Implementation Plan
Based on the UCAR Strategic Plan

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A Prototype Metrics Implementation Plan
A Prototype Metrics Implementation Plan

"What metrics should we use to monitor progress towards our mission and goals?"

Leadership Academy Metrics ALT
Introduction

- Project purpose
  - Steps towards a UCAR metrics implementation plan for measuring progress towards the UCAR strategic plan

- Key sources
  - UCAR Metrics Committee Report (2005)
  - UCAR Strategic Plan (2006 draft)
Metrics Implementation
Considerations

- Pluses and minuses
  - (+) Basis for sound decisions, accountability
  - (-) Added bureaucracy, diminished creativity

- Human factors
  - Management communication of value
  - Avoid direct impact on performance appraisals
  - Outreach and Education
**Metrics Content**

- **NRC report: Five types of metrics**
  - Output, Outcome and Impact
  - Process, Input

- **UCAR Strategic Plan’s Seven Goals:**
  - Research, facilities, IT, organizational excellence, E&O, build and sustain community and technology transfer

- **UCAR Metrics Committee Report:**
  - Provides metrics for characterizing productivity, efficiency and quality of UCAR programs
Leadership Academy Metrics ALT

Mapping the 10 UCAR metrics functional areas to the 7 UCAR strategic plan goals: an example

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Primary Metric Category</th>
<th>Actual Metrics</th>
<th>Types of Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Observing</strong></td>
<td><strong>Observing Facilities</strong></td>
<td><strong>Item</strong></td>
<td><strong>Unit</strong></td>
</tr>
<tr>
<td>Facilitates and Systems</td>
<td>(two areas):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) deployment</td>
<td>i) Number of field projects supported</td>
<td># / period</td>
<td>X</td>
</tr>
<tr>
<td>ii) development</td>
<td>ii) Number of patents</td>
<td># / period</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>iii) Number of non-NSF and joint developments</td>
<td># / period</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>iv) Number of papers, conferences, and citations based on deployments or developments</td>
<td># / period</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>v) User (PI) assessments</td>
<td>evaluation</td>
<td>X</td>
</tr>
</tbody>
</table>
Implementation Plan Process

- Suggested process has 3 main phases
  - Startup
  - The Heavy Lifting
  - Rollout and Review

- Also included in report
  - Rough estimate of resources required
  - Strawman schedule
Leadership Academy Metrics

Commitment by UCAR/NCAR/UOP Management

Form Metrics Implementation Committee (MIC)

Creation of Metrics Development Teams (MDT's)

Workshop on UCAR Metrics

MDT's Create Metrics Implementation Plan (MIP)

MIP Internal Review

Adoption of MIP by MIC

MIP External Review

Revision and Completion of MIP

Implementation of MIP

Review of Results and Metrics

Outreach & Education
Summary

- Team Process
- Metrics Implementation Plan
- Thanks
Towards a Metrics Implementation Plan
Based on the UCAR Strategic Plan

Questions?