

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

**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

A Prototype Metrics Implementation Plan



Leadership Academy Metrics ALT

A Prototype Metrics Implementation Plan



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

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)
 - NRC Metrics 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

Metrics Content (cont.)

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

Strategic Goal	Primary Metric Category	Actual Metrics						
		Item	Unit	Types of Metrics				
				Output	Outcome	Impact	Input	Process
Observing	Observing Facilities							
Facilitates and Systems	(two areas): i) deployment ii) development	i) Number of field projects supported	# / period	X				
		ii) Number of patents	# / period		X			
		iii) Number of non-NSF and joint developments	# / period			X		
		iv) Number of papers, conferences, and citations based on deployments or developments	# / period		X	X		
		v) User (PI) assessments	evaluation		X	X		

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

Startup

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

Outreach & Education

Outreach & Education

Heavy Lifting

Rollout and Review

1

2

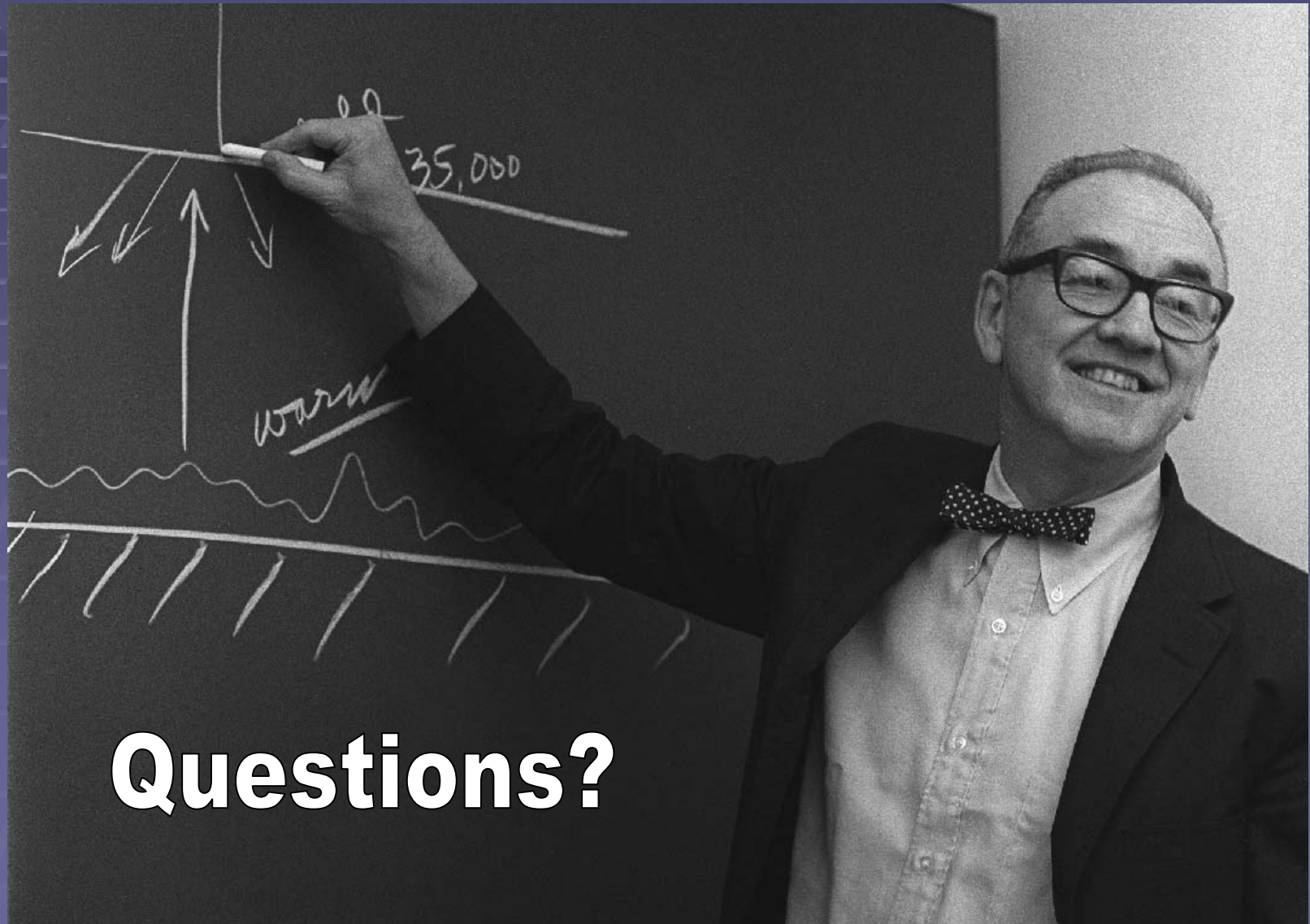
3

Summary

- Team Process
- Metrics Implementation Plan
- Thanks



Towards a Metrics Implementation Plan Based on the UCAR Strategic Plan



Questions?