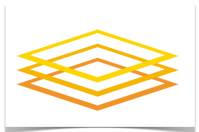


# OSG Balanced Scorecard Workflows

Rob Gardner

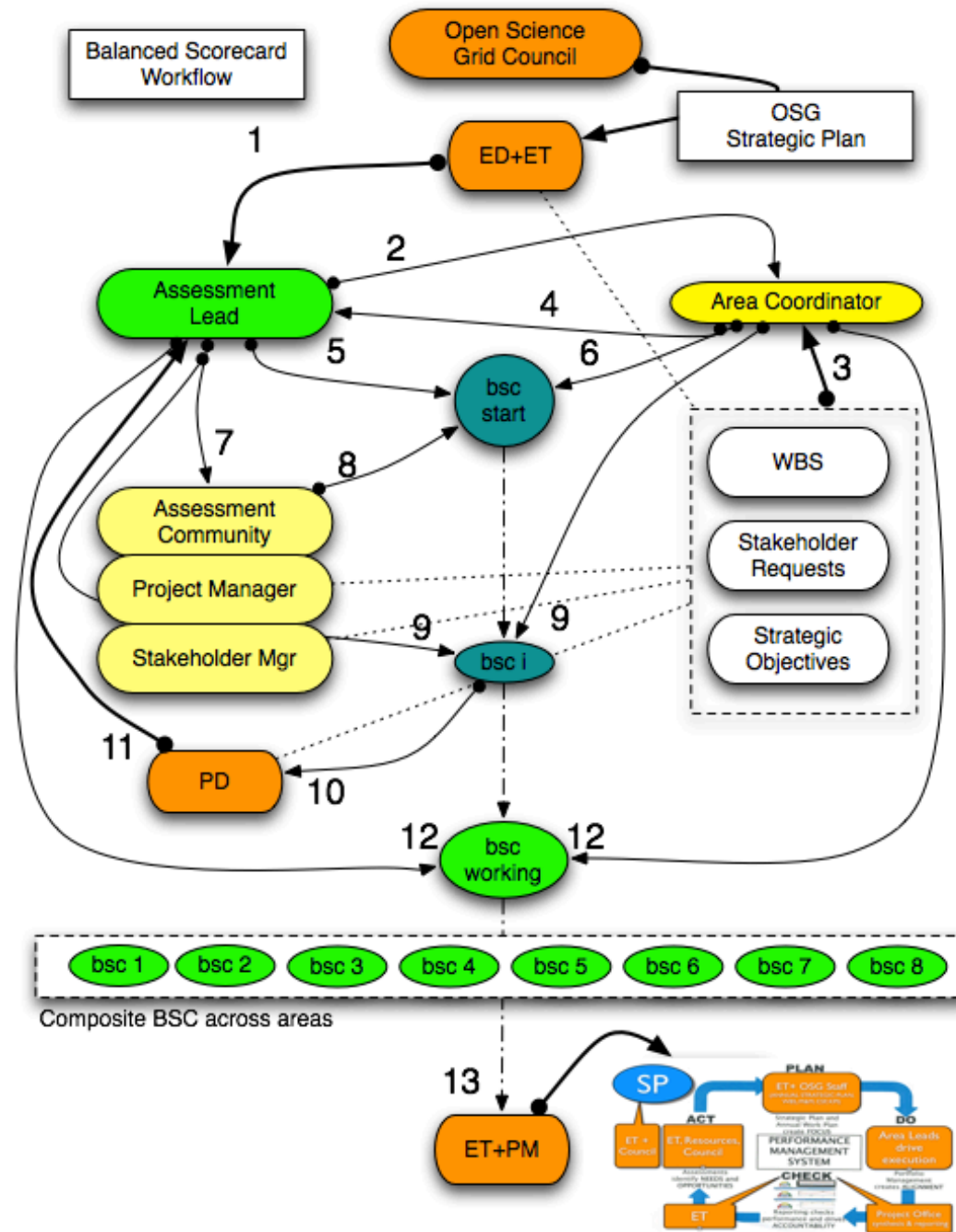
Assessment Bi-weekly

Feb 10, 2012



# Outline

- Workflow
- Template
- Steps
- Example



# Template

OSG BALANCED SCORECARDS														MEETS OR EXCEEDS	
														OPERATIONAL RISK	
														COMPLETE	
GOAL AREA	GOAL OWNERS	METRICS	METRICS OWNER	STAKE-HOLDER	SRQ KEY	STRATEGIC OBJECTIVE	WBS KEY	METRICS UNIT	Y1Q1 ACT	Y1Q2 ACT	Y1Q3 ACT	Y1Q4 ACT	YTD	Y1 TARGET	Y2 TARGET
Major Area::Sub Area      December 2011															
Area	Area Coordinator		AC	OSG	SR1										
			AC	VO 1											
			AC												
			AC												
			AC												
			AC												
			AC												
			AC												
			AC												
			AC												
			AC												
			AC												

# Steps to creating a BSC

- Defining metrics
  - Measurements of progress towards WBS and milestones, Stakeholder requests, and high-level OSG strategic goals
  - Examine area WBS program of work
    - Which have natural metrics, easily “measureable”?
    - Have all milestones been included?
    - Note WBS IDs as keys in BSC
  - Examine OSG Stakeholder requests
    - Note JIRA IDs as keys into BSC

# Creating a BSC, part 2

- Document these following Operations example as appropriate: what, unit, how, etc
- First pass collection, using delegation where appropriate
- Quarterly column: measures since start of named quarter
  - Quarterly trends indicate first derivative
- YTD: cumulative for the year
- Yearly targets – identify as appropriate
- Self-assess risk factors and color-code for review

# Keyed in to Project Management

- The BSC is keyed to the WBS, Jira-tracked Stakeholder requests, and Strategic Objectives

OSG BALANCED SCORECARDS														MEETS OR EXCEEDS	
														OPERATIONAL RISK	
														COMPLETE	
GOAL AREA	GOAL OWNERS	METRICS	METRICS OWNER	STAKE-HOLDER	SRQ KEY	STRATEGIC OBJECTIVE	WBS KEY	METRICS UNIT	Y1Q1 ACT	Y1Q2 ACT	Y1Q3 ACT	Y1Q4 ACT	YTD	Y1 TARGET	Y2 TARGET
Production::Operations    December 2011															
PRODUCTION Operations	RQ	OPEN VS CLOSED GGUS TICKETS	RQ	USLHC	20	SAO3	2.2.1	# RANGE	1.12				1.12	0.95-1.05	0.95-1.05
		WLCG OPS CALL %	RQ	USLHC	NA	SAO7	2.2.1	%	94.8%				94.8%	98	98
		WLCG OPS RELATIONSHIP ACTIVITIES	RQ	USLHC	NA	SAO7	2.2.1	#	3				3	10	15
		OPEN VS CLOSED OSG TICKETS	RQ	OSG	NA	SAO3	2.2.2	# RANGE	0.91				0.91	0.95-1.05	0.95-1.05
		OPS MEETING ATTENDANCE	RQ	OSG	NA	SAO3	2.2.2	%	100				100	100	100
		OPERATIONAL SERVICES SLA EXCEPTIONS	RQ	OSG	NA	SAO6	2.2.2	#	0				0	5	3
		NUMBER OF AFTER HOURS SUPPORT RESPONSES	RQ	OSG	NA	SAO3	2.2.2	#	0				0	5	4
		NUMBER OF AFTER HOURS SERVICE RESPONSES	RQ	OSG	NA	SAO6	2.2.2	#	1				1	5	4
		RELIABILITY OF INFRASTRUCTURE SERVICES	RQ	OSG	NA	SAO6	2.2.2	%	99.4%				99.4%	99	99
		AVAILABILITY OF INFRASTRUCTURE SERVICES	RQ	OSG	NA	SAO6	2.2.2	%	99.3%				99.3%	98	98
		OPEN VS CLOSED JIRA TICKETS	RQ	OSG	NA	SAO3	2.2.3	# RANGE	1.18				1.18	0.95-1.05	0.95-1.05
		STAFF TRAINING EVENTS	RQ	OSG	NA	SAO9	2.2.6	#	0				0	10	10

<https://twiki.grid.iu.edu/bin/view/Assessment/OpsAssessmentDefined>

Done!