XSEDE:
The Extreme Science and Engineering Discovery Environment

Annual Process:
Planning, Reporting, and Review

Draft last updated 12/1/20017
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Introduction

The eXtreme Science and Engineering Discovery Environment (XSEDE) is a distributed project that funds a level of effort approximately equivalent to 90 full-time equivalent (FTE) positions distributed among 200 staff across 19 subaward institutions. As of October 2017, XSEDE provides access to an integrated portfolio of 13 supercomputers and high-end visualization and data analysis resources across the United States and offers services and access to trainings, specialized expertise, and collaboration opportunities within the advanced cyberinfrastructure community. The National Science Foundation (NSF) funded XSEDE, including the Technology Investigation Service which was separately funded but from the same solicitation and ultimately integrated into ongoing XSEDE efforts, from July 2011 to August 2016 for $134.6M followed by a no-compete solicitation for a 5-year renewal from September 2016 to June 2021 for $110M.

The XSEDE project began developing its vision, mission, and goals in 2012 and came to consensus on an initial strategic plan including vision, mission, strategic goals and preliminary Key Performance Indicators (KPIs) and metrics in late 2013. Leadership first reached agreement on the vision and mission, then on the goals and sub-goals, initially through a top-down approach and later used a bottom-up process that resulted in buy-in from all leadership levels, including external stakeholders from the XSEDE Advisory Board (XAB), User Advisory Committee (UAC), and the Service Provider Forum (SPF). Special attention was given to ensure that the vision, mission, and goals also tied to the NSF funding agency objectives. A set of memorable definitions were agreed upon and referenced throughout the process:

- Vision: a state you want to attain
- Mission: your role in attaining that

XSEDE is organized with the Principal Investigator (PI) at the Level 1 (L1) leadership position (in peach below), six Level 2 (L2) areas lead by Directors (in yellow below), and each of those L2 areas are comprised of Level 3 (L3) areas lead by Managers (in green below).
Goals, KPIs, and Metrics Based on Goals

A maximum of three to four goals were set per leadership level where L2 Directors and L3 Managers crafted focused mission statements for their areas in addition to defined annual priorities. Next, metrics were defined bottom-up with by the Managers based on their area’s mission statement. These then fed up to higher-level metrics (L2 Area Metrics) and (project-level) KPIs. Missing program-wide global indicators such as return on investment (ROI), program-wide publications, and cross-group dependencies were discovered and implemented along the way. In retrospect, the development of the project-level KPIs as a bottom-up process lacked top-down perspective and likely should have been developed from both directions with iteration where they come together to assure holistic measures were not neglected.

As a large-scale project, the strategic goals of XSEDE cover a considerable scope. However, the specific activities engaged in by XSEDE are very detailed. To facilitate the detailed planning and to assure those plans are supportive of one or more strategic goals—and more importantly, to assure we do not engage in activities that are not in support of our strategic goals—we decompose the strategic goals into a set of sub-goals. Each strategic sub-goal defines the objectives to be met for successfully delivering the project’s mission and realizing the project’s vision. Metrics are broken into three categories: KPIs, Area Metrics and Other metrics.
In determining the true measures of progress toward each of the sub-goals, metrics that represent measures of impact to the scientific community are used where possible. In many cases, XSEDE primarily had measures of outcome which later were paired with measures of satisfaction, impact, or another form of assessment in attempt to construct an approximate measure of impact. Metrics that are a measure of progress towards a strategic sub-goal are referred to as Key Performance Indicators (KPIs). KPIs are simply a subset of our Area Metrics that we feel to be the true or best currently-available measures of how well we are meeting a particular sub-goal and thus a measure of performance and impact of the project. All KPIs must be directly mapped to an XSEDE strategic sub-goal. The key concept is not that the KPIs themselves have a direct causal effect on eventual outcomes or impacts, but rather that the they are chosen so that actions and decisions which move the metrics in the desired direction also move the organization in the direction of the desired goals and impact.

Area Metrics are used to measure the performance of a process, function or functional area within XSEDE. The L2 and L3 levels of the XSEDE hierarchy have Area Metrics. L2 Area Metrics are typically a combined subset of L3 Area Metrics deemed to be an appropriate measure of the overall functional role of that L2 Area. L3 Area Metrics measure a specific process or function of the L3. All Area Metrics must be directly mapped to an XSEDE strategic sub-goal.

Table 1-1 is directly from an XSEDE Interim Project Report which shows the project’s progress toward the three strategic goals and associated sub-goals. Status icons are used in the table as follows:

- **G** A green status is defined as a strategic goal for which at least 90% of the targets for all KPIs are met.
- **Y** A yellow status is defined as a strategic goal within which at least 60% of the targets for all KPIs are met.
- **R** A red status is a strategic goal with less than 60% of the KPI targets met.
- **W** A white status indicates there are currently no metrics tracked for this sub-goal or there is not complete data for any of the metrics tracked.

Multiple indicators represent a strategic goal that has sub-goals for which there is incomplete data or that have metrics not currently tracked. In these cases, the second indicator is a qualitative assessment of the status provided in lieu of sufficient data or a formal metric being in place.

**Table 1-1: Summary of key performance indicators (KPIs) for XSEDE.**

<table>
<thead>
<tr>
<th>Strategic Goals</th>
<th>Sub-goals</th>
<th>KPIs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Deepen and Extend Use</strong> (&lt;sup&gt;§3.1&lt;/sup&gt;)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| **G** Deepen use (existing communities) (<sup>§3.1.1</sup>) | | - Average ECSS impact rating  
- Average satisfaction with ECSS support  
- Number of completed ECSS projects |
|   | Extend use (new communities) ([§3.1.2](#)) | • Number of new users from underrepresented communities and non-traditional disciplines of XSEDE resources and services  
  • Number of sustained users from underrepresented communities and non-traditional disciplines of XSEDE resources and services |
|---|---|---|
| G | Prepare the current and next generation ([§3.1.3](#)) | • Number of attendees in synchronous and asynchronous training  
  • Average impact assessment of training for attendees registered through the XSEDE User Portal |
| G | Raise awareness of the value of advanced digital services ([§3.1.4](#)) | • Number of pageviews to the XSEDE website  
  • Number of Pageviews to the XSEDE User Portal  
  • Number of social media impressions  
  • Number of media hits |

**Advance the Ecosystem ([§3.2](#))**

| G | Create an open and evolving e-infrastructure ([§3.2.1](#)) | • Number of new capabilities made available for production deployment  
  • Average satisfaction rating of XCI services |
| W | Enhance the array of technical expertise and support services ([§3.2.2](#)) | • Average rating of staff regarding how well-prepared they feel to perform their jobs |

**Sustain the Ecosystem ([§3.3](#))**

| G | Provide reliable, efficient, and secure infrastructure ([§3.3.1](#)) | • Average composite availability of core services  
  • Hours of downtime with direct user impacts from an XSEDE security incident |
| G | Provide excellent user support ([§3.3.2](#)) | • Mean time to ticket resolution  
  • Average user satisfaction rating for allocations and other support services |
| R | Operate an effective and productive virtual organization ([§3.3.3](#)) | • Percentage of recommendations addressed by relevant project areas |
| R | Operate an innovative virtual organization ([§3.3.4](#)) | • Number of key improvements addressed from systematic evaluation  
  • Number of key improvements addressed from external sources  
  • Ratio of proactive to reactive improvements  
  • Number of staff publications |

Any additional measures, called Other Metrics, that are used as data points for use in planning activities, decision making, quality assurance, or improvement monitoring are captured at an L3 level.
In addition to these quantitative measures (i.e. metrics and KPIs), there are qualitative indicators that may be used to enhance the value and impact of the function and/or process behind the metrics measure. As appropriate, qualitative indicators will be used to illustrate and extend the metric data and trends. Early in the process, there was discouragement to use qualitative measures of impact, but it has become clear that they are necessary to “tell the whole story” of impact of the project. NSF and review panels have also come to this thinking and we have returned to putting additional efforts into collecting the qualitative measures which are typically captured in research successes and similar stories: https://www.xsede.org/science-successes

There are two repositories for the XSEDE metrics definitions and metrics data, serving different uses of the metrics. These repositories are each publicly accessible and updated according to the XSEDE project reporting schedule, which is typically a three-month or quarterly interval.

**XSEDE Staff Wiki**

The XSEDE Staff Wiki has a section dedicated to the XSEDE KPIs and Metrics. This section is accessible from the XSEDE Staff Wiki homepage under the Project Execution section and is intended for general purpose use. This wiki page contains only metrics for the active XSEDE project (2016 - 2021). The information is cannot be directly manipulated for a customized view.

**XSEDE Metrics Dashboard**

The XSEDE Metrics Dashboard was specifically created to allow more in-depth metrics analysis including trend analysis. It contains multiple views and allows for customized views for analysis of metrics to a greater extent. The tool is accessible via the XSEDE website and XSEDE User Portal. The tool contains metrics from the initial five year XSEDE project (2011 - 2016) as well as the current five year XSEDE project (2016 - 2021). KPIs, L2 Area Metrics and L3 Area Metrics are included in the XSEDE Metrics Dashboard. Other Metrics are not available in the XSEDE Metrics Dashboard.

**Baldrige Criteria**

XSEDE utilized the Baldrige Criteria by adapting the strategy to the XSEDE context given that it was not designed for an organization such as XSEDE. As the Baldrige Criteria was applied, XSEDE learned much about the organization that was critical in informing the multi-year efforts in defining vision, mission, strategic goals, KPIs, metrics, and communication processes. The Baldrige Criteria has been incorporated into the organizational structure, governance, policies, and processes of the project. It has been internalized in the KPIs, strategic planning, and annual planning refinement resulting in an innovative, learning organization.

**Performance Management Plan**

As identified in the XSEDE Project Execution Plan, the Performance Management Plan serves to define and explain how metrics are used by the XSEDE Project to drive project performance toward the strategic goals of the project. In addition, it includes the method and plan by which the project evaluates and refines metrics. Lastly, the topic of “measuring impact” will be addressed.
As the Strategic Planning, Policy & Evaluation team continues its work, they will be considering alternative methods for developing and improving organizational methods. This is in addition to executing the Performance Management Plan, which aims to determine the quality of metric usage and develop recommendations for refinement.

Requirements

The XSEDE Annual Planning process includes prioritizing activities. According to the Cooperative Agreement between the institutions involved with XSEDE and the NSF via the Terms and Conditions, “The Annual Report and Program Plan will include a detailed plan for the following year and, if necessary, an update to the Project Execution Plan” (PEP). The PEP states, “As part of the XSEDE Annual Planning process, the project will define the schedule, milestones, budget, and scope.” The Annual Planning process is accomplished through the following steps:

1. L3 Planning
   a. Generate a prioritized list of activities--aligned with the area’s mission as well as XSEDE goals and sub-goals--in the planning Statement of Work (SOW) for each L3 area.

2. L2 & L3 Planning
   a. Utilize FTE and non-FTE budget data to decide which activities can be accomplished.
   b. Perform a +/-5% budget exercise to determine what work could be implemented or discontinued if there were an increase or decrease in budget.

3. Project-wide Planning
   a. Prepare and present the plan to all XSEDE L2 Directors and select L3 Managers via a face-to-face quarterly meeting in order to receive feedback. These presentations take into account the User Survey and Staff Climate Survey recommendations as well as the refinement that occurs at every L2 and L3 area as staff work with their customer base to receive formal and informal feedback, driving continuous improvement; cross-area work is also prioritized during this time.
   b. Present and receive feedback from external stakeholders via the XSEDE Advisory Board (XAB), the Service Provider Forum (SPF), and the User Advisory Committee (UAC).
   c. Refine text into the Planning and Reporting document that is ultimately delivered to NSF.

4. Document plan based on all inputs and submit to NSF for approval. The approval process includes conducting an annual review of XSEDE looking at prior performance and future plans. This review produces a report with feedback from the review panel from the annual NSF Review.

5. Implement the plan once accepted by NSF and modified as necessary based on the review panel’s feedback.
Note: all time increments are relative to the Annual Plan and Report Submission to NSF

Improved formalization of scope considerations will also be addressed in Plan Year (PY) PY7 and beyond by implementing performance analysis learned through the Performance Management Plan process as well as activities approved through the Project Improvement Fund, a separate portion of allocable funds. At any point in time in the year an L2 Director or L3 Manager can make changes within scope, schedule, and budget responding to circumstances as appropriate through a change-control process; project-wide assessments can be made at the SMT level.

Staff Climate Survey | User Survey

The XSEDE staff climate and user surveys, including the quality and efficacy of its business processes and communications mechanisms, contributes to improvements and further developments of the program.

Timeline

Note: User Survey is offset one month after Staff Climate Survey

<table>
<thead>
<tr>
<th>19 months before</th>
<th>Survey preparation</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 months before</td>
<td>Senior Management Team survey review</td>
</tr>
<tr>
<td>14 months before</td>
<td>Dispense survey</td>
</tr>
</tbody>
</table>

Chart:

- Survey
- Strategy
- Planning
- Annual Report and Plan
- NSF Review

Legend:

- User Survey
- Staff Climate Survey
- Presentation of Survey Results
- Performance Analysis
- Planning Process Begins
- External Feedback
- Planning Presentations
- XSEDE Review at NSF
- Planning Strategy for Next PY Approved
- Annual Report Due to NSF
- Response to NSF and Plan Realignment

Timeline:

- 16 months before Survey preparation
- 14 months before Survey preparation
- 12 months before Senior Management Team survey review
- 10 months before Dispense survey
- 8 months before Survey preparation
- 6 months before Senior Management Team survey review
- 4 months before Dispense survey
- 2 months before Survey preparation
- 1 month after Staff Climate Survey
<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 months before</td>
<td>Interim survey reports</td>
</tr>
<tr>
<td>11 months before</td>
<td>Survey data analysis</td>
</tr>
<tr>
<td>10 months before</td>
<td>Final survey results and recommendations</td>
</tr>
<tr>
<td>9 months before</td>
<td>Quarterly meeting presentation of results</td>
</tr>
<tr>
<td>4 months before</td>
<td>L1, L2, and L3 area responses to staff climate survey</td>
</tr>
</tbody>
</table>

**Performance Management & Planning**

Strategy and Planning members of the XSEDE Strategy, Policy, Planning & Evaluation team meet to consider the vision, mission, goals and how they align with the work and budget for the coming year. This is a new portion of the planning process for XSEDE

**Timeline**

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 months before</td>
<td>Performance Management Plan shared with NSF to chart a course over the coming years to determine the quality of metric usage</td>
</tr>
<tr>
<td>8 months before</td>
<td>Develop recommendations for the Strategy, Policy, Planning, and Evaluation Team to present to the Senior Management Team</td>
</tr>
</tbody>
</table>

**Link**

[https://drive.google.com/drive/u/0/folders/0B0pU-l0DK_NUS3lzRzjEdmpFNXM](https://drive.google.com/drive/u/0/folders/0B0pU-l0DK_NUS3lzRzjEdmpFNXM)
Planning

The bulk of the planning process for XSEDE was accomplished during the proposal-writing phase. NSF requirements such as external reviews, annual budget and effort planning (essentially aligning to the already-approved budget and plans), and quarterly reporting coupled with gaining internal and external input, establishing a strategic plan, and setting goals and KPIs as inputs allowed multiple feedback points that aided in setting refined priorities or outputs. Further refinements are made through the annual planning process described below.

According to the Cooperative Agreement between the institutions involved with XSEDE and the NSF via the Terms and Conditions, “The Annual Report and Program Plan will include a detailed plan for the following year and, if necessary, an update to the Project Execution Plan” (PEP). The PEP states, “As part of the XSEDE Annual Planning process, the project will define the schedule, milestones, budget, and scope.”

Plan: via Google Docs

Timeline

<table>
<thead>
<tr>
<th>3.5 months before</th>
<th>Generate and prioritize list of activities in the Planning Statement of Work (SOW) for each L3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.4 months before</td>
<td>Insert FTE and Non-FTE tabs into Planning SOW spreadsheets (done by Business Operations)</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>3.3 months before</td>
<td>Decide which activities can be accomplished within budget</td>
</tr>
<tr>
<td>3.2 months before</td>
<td>Complete Area Metrics Sheet</td>
</tr>
<tr>
<td>3.1 months before</td>
<td>Perform the +/-5% budget exercise</td>
</tr>
</tbody>
</table>

**Link**  
(sample, one for each L2 area)  
https://docs.google.com/spreadsheets/d/1h39U7KRm2XJPEOcwqixucxLjbye2CTeDFP5WQX-0kEQ/

**Directions**

- New tab added to PY7 Planning SOW Spreadsheets for completion: Area Metrics  
- In the Area Metrics sheet you will see the Area Metrics applicable to the respective WBS section, along with the target for PY6 and the related sub-goal supported.  
- Please fill in the cell corresponding to the PY7 target. If you plan on adding or removing area metrics, please note these here. You will need to work with your Project Manager to fill out a PCR for these though.

**Plan: Presentations**

The Planning Presentation portion of the Planning process allows time at a face-to-face quarterly meeting between the L1 PI/Project Director, L2 Directors, and L3 Managers to share their area plans for the year and receive any feedback; in particular cross-area work responsibilities are addressed.

**Timeline**

| 2 months before | Present Plan, Area Metrics, and +/-5% at Quarterly Meeting (face-to-face) to receive feedback from L1, L2, and L3 directors and managers |

**Link**  
(sample, one for each L2 area)  
https://docs.google.com/presentation/d/16dtQ3tGCFijWdzssshyVAAsXckZsROCrirUZ66u-tYs/
Directions

- For the Priorities slide, please list your activities in order of most importance. Indicate which WBS area they are part of.
- Identification of cross-area dependencies of any activities planned.
- For the Area Metrics slides, please fill in the PY7 targets. Also, note if you are planning on removing or adding any metrics. You will need to file a PCR for this.
- For the Recommendations slide, we have included your response to the PY6 survey at the end of the presentation for your reference. The User Survey has not been released yet and thus we will have to address the recommendations once the results from that survey are released.
- The Other Comments/Observations slide is optional. If there is no content for this slide, simply delete it from your L2 version of the slides.

Plan: Drafting

In order to bring all of the Plan information into the report, a process similar to the IPR generation process is executed.

Timeline

<table>
<thead>
<tr>
<th>Months before</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.5 months</td>
<td>All L2 text (including L3 text) due to PMs (recommendation: L3 text due to PMs, PMs give text to L2s)</td>
</tr>
<tr>
<td>1.4 months</td>
<td>All text due in GoogleDocs by PMs, including copy edits</td>
</tr>
<tr>
<td>1.3 months</td>
<td>KPI targets calculated</td>
</tr>
<tr>
<td>1.2 months</td>
<td>Level 1 Priorities</td>
</tr>
<tr>
<td>1.1 months</td>
<td>Copy Edit</td>
</tr>
<tr>
<td>1.1 months</td>
<td>John edit content</td>
</tr>
<tr>
<td>1.1 months</td>
<td>Responses to John’s edits</td>
</tr>
</tbody>
</table>

Link

https://docs.google.com/document/d/1j914QN-DpFvTQax0z2ih7e7gKb4i43UE9z-TEag_w7E/edit
Sample Directions

- In addition to supplying the values for the RY2 Targets in the Metrics tables, please provide a succinct narrative addressing your PY7 Activities. In this narrative, please:
  - Discuss metric targets first. If your targets have not changed from PY6 to PY7, state this. For new/adjusted targets, please explain why you chose the target you did.
  - Next, discuss metrics added/removed for PY7. Give explanations as to why you have either added or removed metrics.
  - Finally, discuss activities. Refer to your PY7 SOW for the list of activities you have committed to for PY7 and refer to your section of the PY6 plan for examples of what to discuss about those activities: [https://confluence.xsede.org/download/attachments/1672692/XSEDE%20PY6%20Program%20Plan%20-%20FINAL.pdf?version=1&modificationDate=1470861434000&api=v2](https://confluence.xsede.org/download/attachments/1672692/XSEDE%20PY6%20Program%20Plan%20-%20FINAL.pdf?version=1&modificationDate=1470861434000&api=v2).

Plan: External Feedback

XSEDE values feedback from the advanced computing and cyberinfrastructure community and therefore shares the Annual Plan with the XAB and the SP Forum.

Timeline

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 month before</td>
<td>Clean up PY7 Plan and get it ready for XSEDE Advisory Board (XAB) review</td>
</tr>
<tr>
<td>1 month before</td>
<td>PY7 Plan Final Review goes to XAB</td>
</tr>
<tr>
<td>1 month before</td>
<td>Incorporate XAB comments/suggestions into draft PY7 Plan</td>
</tr>
<tr>
<td>1 month before</td>
<td>Presentations shared with Service Provider Forum (SP Forum) to receive feedback on the next plan year trajectory</td>
</tr>
</tbody>
</table>

Link

At this time, the draft is pulled into a Word document for formatting: [https://uofi.box.com/s/f7evkc9gr5e40o7v432tqaa9omw22hqg](https://uofi.box.com/s/f7evkc9gr5e40o7v432tqaa9omw22hqg)

Directions

**Perspective & Consistency**

- The report should be consistent in writing style and level of detail.
- The report should be written in first person where possible.
- Section contents should be written in an essay type format (not sub-headings by L3 or metrics).
- Do not use contractions (unless quoting).
- Italicize names of systems.
- In the L1/L2 highlights, (1) avoid repeating text and (2) forward referencing of metrics is acceptable.
- Reporting period v. quarter: Now that we have transitioned our reports to Interim Project Reports, we need to align our language accordingly. As such, please refer to the period as “reporting period” as opposed “quarter” in text.

**Interim Project Report**

The IPR is one of the NSF deliverables in the Project Execution Plan. Governance and decision making within XSEDE are made public through the XSEDE IPRs, and to provide greater transparency in project governance, decisions and decision-making, and in addressing findings and recommendations of review panels, management bodies and advisory bodies.

**Process**

**XSEDE Report Generation Flow**

![Diagram of XSEDE Report Generation Flow]

**IPR Timeline**

| 2 weeks before | All L2 text (including L3 text) due to PMs |

---

XSEDE Planning, Reporting, and Review Process
<table>
<thead>
<tr>
<th>Week of</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 weeks before</td>
<td>All text due in Google Docs by PMs, including copy edits</td>
</tr>
<tr>
<td>2 weeks before</td>
<td>KPIs calculated and analyzed</td>
</tr>
<tr>
<td>2 weeks before</td>
<td>Level 1 Highlights &amp; Summary (Ron)</td>
</tr>
<tr>
<td>1 week before</td>
<td>Copy Edit</td>
</tr>
<tr>
<td>1 week before</td>
<td>PI edit content</td>
</tr>
<tr>
<td>1 week before</td>
<td>Responses to John’s edits</td>
</tr>
<tr>
<td>1 week before</td>
<td>Leslie F. format report</td>
</tr>
<tr>
<td><strong>Week of</strong></td>
<td><strong>Final Review/Annual Report &amp; PYn Plan due</strong></td>
</tr>
</tbody>
</table>

**Link**

(same link as Plan Drafting)

[https://docs.google.com/document/d/1j914QN-DpFvTQax0z2ih7e7gKb4i43UE9z-TEag_w7E/edit](https://docs.google.com/document/d/1j914QN-DpFvTQax0z2ih7e7gKb4i43UE9z-TEag_w7E/edit)

**Directions**

The template identifies the sections that require reporting period updates. They are designated by a comment, indicating that an update is required and what should be addressed in the updated text.

- In addition to supplying the values for the Area Metrics tables, please provide a succinct response to these questions in your narrative following the table: (1) Are you meeting your metric targets? (2) If not, why not? and (3) What are your plans to fix the issue? The rule of thumb to answering these questions and to providing additional detail regarding the metrics is, “if I were the NSF or review panel, what questions would I ask?”
- For a quarterly metric target that has been met, and for consistency purposes, please simply write “This target was met.”
- Area Highlights: L2 Directors are being asked to write a short, cohesive narrative of the successes of their area. To facilitate this, the L3 managers are being asked to provide a short, 1-2 paragraph summary in the L2 “Area Highlights”.
- Reporting period v. quarter: Now that we have transitioned our reports to Interim Project Reports, we need to align our language accordingly. As such, please refer to the period as “reporting period” as opposed “quarter” in text.
NSF Review

According to the Cooperative Agreement between the institutions involved with XSEDE and the NSF via the Terms and Conditions, the Awardee and relevant sub-awardees will participate in an annual review meeting either on site or at NSF. The purpose of the review will be to examine yearly progress and to suggest any changes that would benefit the user community.

Timeline

<table>
<thead>
<tr>
<th>Time after Review</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 weeks after review</td>
<td>Review panel questions due to XSEDE</td>
</tr>
<tr>
<td>3 weeks after review</td>
<td>(If a major review occurs such as during recompetition, a Red Team is assembled comprised of community stakeholders to go through content and get additional feedback before the review)</td>
</tr>
<tr>
<td>3 weeks after review</td>
<td>Internal presentation and review of materials (remote meeting)</td>
</tr>
<tr>
<td>Time after Review</td>
<td>Event</td>
</tr>
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</tr>
<tr>
<td>4 weeks after review</td>
<td>Written responses to panel questions due to NSF</td>
</tr>
<tr>
<td>4 weeks after review</td>
<td>Dry-Run in Arlington, VA</td>
</tr>
<tr>
<td>4 weeks after review</td>
<td>Panel Review at NSF</td>
</tr>
<tr>
<td>1-6 weeks after review</td>
<td>XSEDE receives Panel Feedback Report</td>
</tr>
<tr>
<td>2-8 weeks after review</td>
<td>XSEDE responds to Panel Feedback Report</td>
</tr>
<tr>
<td>3-9 weeks after review</td>
<td>Communication of feedback to all levels of staff</td>
</tr>
</tbody>
</table>

**Link**

https://confluence.xsede.org/display/XT/2017+XSEDE+Panel+Review

**Conclusion**

Refinement occurs at every L2 and L3 area as staff work with their customer base to receive formal and informal feedback that drives continuous improvement. XSEDE remains responsive at all levels to NSF and the greater advanced computing community. Final versions of all XSEDE Reports and Plans are preserved through the XSEDE digital object repository via the Illinois Digital Environment for Access to Learning and Scholarship (IDEALS), utilizing handles with persistent identifiers.