Annual Planning Process

Directions and Spreadsheets:

Planning SOW spreadsheets beginning with PY7 can be found in XSEDE’s Planning Google Drive: https://drive.google.com/drive/u/1/folders/0B16f9Te7wFwmMERFMn05QmITQgQ

The spreadsheets are located in the Planning folder => XSEDE2 => L2 Area => L3 Area => Planning SOW spreadsheet.

Once you have identified your respective Planning SOW spreadsheet, please note that there are seven (7) tabs in each sheet that relate to PYx: (1) PYx Plan, (2) PYx Plan Field Descriptions, (3) PYx FTE Staff, (4) PYx Non-FTE, (5) PYx KPIs, (6) PYx 5% Budget, and (7) PYx Publications.

- **Generate list of activities in the Planning SOW for each L3:**
  - Level 2/3 managers in each Level 2 area will work together to generate a complete list of all potential activities in their Level 3 teams for the Planning Year. There may be a need to communicate across WBS Level 2 areas to coordinate activities to meet a requirement, or clarification from the UREP on a given Use Case. The output of this step should be that you have filled in the (1) Cross Area, (2) Activity Title, (3) Activity Description, and (4) Sub-Goal columns.

- **Prioritize Activities:**
  - The Level 2/3 managers will prioritize the Level 3 activities. The output of this step should be that you have filled in the “Priority” column on the SOW Spreadsheet. Use any increment that you would like, but the priority numbers must be unique. The end result should be that you have your activities sorted with the highest priority activities at the top descending to the lower priority activities at the bottom.

- **Insert FTE and non-FTE tabs into Planning SOW Spreadsheets:**
  - XSEDE’s Business Office will fill this information in. Questions should be directed to Ron Payne: rpayne@illinois.edu. Once complete, apply resourcing (staff FTE and non-staff effort) to each activity.

- **Decide which activities can be accomplished within budget:**
  - Determine which activities will be performed in the Plan Year and which will not. Some may not be performed due to lower priority, while others may be of high priority but too expensive (FTE and/or funding) to be performed. The output of this step should be that the following columns in the PLAN sheet will be complete: (1) In Plan, (2) FTE %, (3) Non-FTE $, (4) Non-FTE Description, and (5) By Institution.

- **Review KPIs:**
  - Please fill in the cell corresponding to the PYx target. NOTE that KPI target changes with rationale should be called out in the L2 presentations at the March Quarterly Staff Meeting. If you plan on adding or removing KPIs, please note these here. You will need to work with your Project Manager to fill out a PCR to do this, however.

- **Document what you would do if requested to cut 5% or you received an additional 5%:**
  - In cell B2, enter your area’s Total FTE (this can be found in cell F2 of the FTE Staff sheet). Cell C2 will then calculate the total FTE that you will either need to increase or reduce for the budget exercise. For either the 5% Budget Increase or 5% Budget Decrease, list the activities that are affected (column B), the FTE amount they are affected by (column C), and then the explanation and impact of the change (column D). Make sure that the sum of the increase or decrease, reflected in cells C4 and C18, respectively, match C2.

Quarterly Meeting in March:

- Present activities planned, KPIs, and +/-5% at Quarterly Meeting.

**Directions for PY11 Plan** (The timeframe of the PY11 Plan is September 2021 – August 2022.)

**Important Dates for PY11 Plan**

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/15 - 2/18/2021</td>
<td>Generate and prioritize list of activities in the Planning SOW for each L3</td>
</tr>
<tr>
<td></td>
<td><a href="https://drive.google.com/drive/u/0/folders/0B16f9Te7wFwmMERFMn05QmITQgQ">https://drive.google.com/drive/u/0/folders/0B16f9Te7wFwmMERFMn05QmITQgQ</a></td>
</tr>
<tr>
<td></td>
<td>Refer to the text from your section(s) of the PY10 Plan as a guide (look for PY10 tab in the planning spreadsheets)</td>
</tr>
<tr>
<td>2/19/2021</td>
<td>Insert FTE and Non-FTE tabs into Planning SOW spreadsheets (done by the Business Office/Ron)</td>
</tr>
<tr>
<td>2/22 - 2/23/2021</td>
<td>Decide which activities can be accomplished within budget; review KPIs for accuracy and set RY6 targets (note that target changes must be complete prior to the March Quarterly meeting or a PCR must be completed).</td>
</tr>
<tr>
<td>3/1 - 3/2/2021</td>
<td>+/-5% budget exercise</td>
</tr>
<tr>
<td>3/3/2021</td>
<td>Add planned publications to PY11 Publications tab</td>
</tr>
<tr>
<td>3/10 - 3/11/2021</td>
<td>L2s: Present Plan, KPIs, Planned Publications, +/-5% at Quarterly Meeting</td>
</tr>
<tr>
<td></td>
<td>Google Slides template for L2 PY11 Planning presentations (make a copy for your presentation and remove the unnecessary slides with other L2 KPI info).</td>
</tr>
<tr>
<td>3/26/2021</td>
<td>L3 text of PY11 Program Plan due to PMs; PMs give L3 text to L2s</td>
</tr>
<tr>
<td></td>
<td>- Succinctly discuss PY11 activities. These can be found in your PY11 SOWs</td>
</tr>
</tbody>
</table>
3/31/2021  All L2 text of PY11 Program Plan (including L3 text) due to PMs

- In the tables, set your targets for RY6.
- Below the table, discuss why the targets were set to the numbers that they were. If the KPI is not new and/or your target did not change from PY10 to PY11, state this. For new/adjusted targets, please explain why you chose the target you did. Next, discuss KPIs added/removed/modified for PY11 (other than target changes). Give explanations as to why you added/removed/modified KPIs.
- Discuss your area’s overall PY11 Priorities. This should include activities that were presented at the March Quarterly Meeting. From an overall area perspective, discuss what’s new/changing including any discontinued activities.

4/1/2021  All PY11 Program Plan text due in GoogleDocs by PMs, including copy edits

4/2/2021  KPI targets calculated

4/2/2021  Level 1 Priorities (Ron)

4/5/2021  ER Copy Edit

4/6/2021  John/Tim edit content

4/7/2021  Responses to John/Tim’s edits

4/8/2021  Clean up PY11 Program Plan and get it ready for XAB’s review

4/9/2021  PY11 Program Plan Final Review goes to XAB

4/16/2021  PY11 Program Plan presented at XAB meeting

4/22 - 4/23/2021  Incorporate XAB comments/suggestions into draft PY11 Program Plan

5/20/2021  PY11 Program Plan due (in conjunction with Annual Report)