AUSTRALIAN e-RESEARCH INFRASTRUCTURE COUNCIL (AeRIC)

AeRIC MEETING – 5 AUGUST 2008

AGENDA ITEM 5: Development of ARCS KPIs

Purpose

To seek AeRIC's feedback on the parameters and process proposed to assist ARCS develop an acceptable set of strategic KPIs.

ARCS Key Performance Indicators

Introduction

Following a review of the 2008-09 ARCS Annual Business Plan, ARCS has agreed to develop a set of strategic Key Performance Indicators (KPIs) to drive the further development of ARCS.

The proposal is to develop a set of metrics and to provide a base level of measurement against them this year, so that developments by the 2009 Annual Report (due in September 2009) can be more easily identified.

Parameters

A desire to apply strategic KPIs can only be achieved if the key strategy drivers and performance goals for ARCS are agreed, and their prioritisation also agreed.

From a PfC Investment Plan perspective, the key performance goals for ARCS might be summarised as follows:

- *Enhanced collaboration and research workflows:* The identification, development, provision and support for 'national' eResearch services aligned with "collaboration"
  - These major services will need to be identified and described, possibly by function
  - The target for focus in the space: international, national, regional, institutional cf problem, discipline, team, individual, may need to be more explicitly agreed to get meaningful KPIs
  - Each service or service category, may be best treated with specific measures
- *ARCS builds into other infrastructure:* The improvement in service delivery from NCRIS funded and other major research infrastructure elements due to uptake of and reliance on ARCS services
  - The term 'major' needs definition
  - Valid targets might need to be identified to provide a priority for action over time: Synchrotron, telescopes, HPC sites, major data holdings
- *ARCS supports research*: Improved research achievements of national priority and/or excellence
  - The conjunction may be the highest priority, as per NCI, the balance or relationship between them needs to be clarified
  - The direct definition of priority available to NCRIS funded activities is the 2008 Roadmap
  - A definition of excellence in this context is needed, or again specifics may help, eg. federation fellows, NH&MRC/ARC awards
  - The term "improved" needs definition

Priority Services

eResearch support is a big space, which ARCS cannot be expected to address in its entirety. The sweet spot where ARCS could be positioned as the preferred service provider might be services that:

- Require multiple organisations or separately managed facilities to inter-operate

    - especially where that support would require multiple members of ARCS to assist
    - and where sustained assistance from ARCS would be required
- Would or could be replicated in several problem or application areas, not a single pervasive solution (such as networking)
    - For instance health data sharing and an ABIN 'grid' may deploy similar technologies, and similar technologies to more openly accessible ARCS services, but be operated in completely segregated environments
- Would otherwise not be provided, or that would be provided in a fragmented form not easily accessed nationally, ie ARCS is a leading exponent/change agent

Services categories that might be considered would include items such as:

- Data storage, mirroring, re-location, pipe-lining and general data movement services
- Workflow Infrastructures including remote job submission
- Collaboration interaction environments, from video to remote presence solutions
- Authorisation systems support

Plan of attack

The process of improving the KPIs needs considerable discussion and interaction with ARCS, and may also require some discussion between ARCS and DIISR, assisted through the expertise available in AeRIC.

So, the steps I propose are:

- Review what we are trying to achieve, with AeRIC this meeting
- Engage Tony and the ARCS S/C in a discussion, they have a planned face to face later in August, so given some ground work preparation, the timing is good
- Following a discussion with ARCS, provide an update out of session to AeRIC for feedback
- Iterate a draft set of KPIs with ARCS leading towards a consolidated suggestion to AeRIC at its next meeting

Should that meeting be during the eResearch Australia conference; members of ARCS could be easily involved in a discussion with AeRIC if required.

Action

Members provide feedback to the Executive Director to guide the process going forward.

AeRIC Executive Director

August 2008

Attachment A

The following text is extracted from the ARCS 2008/09 Business Plan.

Milestones

It is important to establish and describe target milestones to indicate the expected dates of service availability, the enhancement of existing services and the deployment of new services over the Period:

Before 31 July 2008:

- ARCS announces that after an initial Establishment Period it is now formally 'Open for Business' and widely advertises and promotes this;
- Communication and Outreach Strategies finalised and initiated;
- ARCS Telephone Helpdesk fully deployed with the phone answered during all standard Australian business hours and with the email Helpdesk available for registering issues after hours;
- Establish an ARCS User Reference Group to provide advice and guidance on appropriate ARCS Services and new service directions;
- ARCS Data Fabric available to the whole research community with basic functionality and modest storage for free and for more significant storage needs at hardware cost;
- ARCS compute grid and GRISU will have their production services well-defined, in full production-mode operation and be well-documented on the ARCS web site with exemplars and use case studies;
- ARCS web site completed including clear and accessible explanations of the full suite of ARCS Production Services including exemplars and use cases;
- ARCS and EVOGH enter into a formal agreement for the licensing of EVO use in Australia, where legitimate use will encompass all activities and entities involved in furthering research and education in Australia;
- ARCS Authorisation Services Manager appointed and Authorisation Services activities underway;
- ARCS Collaboration Services Manager appointed and Collaboration Services undertakes a structured program of enthusiastic and proactive engagement with regional and discipline-based research communities and University IT Directors;
- ARCS engagement with New Zealand counterparts initiated and opportunities for cooperation explored;
- NeAT Project Committees established and NeAT Project Managers appointed and NeAT Projects underway;
- Each of ARCS Collaboration, Systems, Data and Authorisation Services Teams produce a written document describing their Quality Assurance and Change Management Procedures so that they can be placed on the ARCS web site and available for the research community and other Service Providers;
- Each NeAT Project Committee establishes its own Quality Assurance and Change Management Procedures and wherever possible these should be consistent with those of ANDS and ARCS;
- Explore with the NT Government and Charles Darwin University the possibility of establishing a MARCS in the Northern Territory to enable the delivery of ARCS Services and Capabilities into the region;
- Complete planning of the ARCS 1-day Workshop at the eReseach Australasia 2008 Conference in Melbourne.

Before 1 October 2008:

- Each ARCS Services Team establishes and targets a set of new user sub-disciplines and or communities and proactively establishes a cooperative relationship in order to explore and ultimately deliver a set of relevant services to that community;
- EVO@AU deployed and operational and Communities established;
- University roll-out of EVO@AU to Monash and interested first-round universities;
- Enhanced functionality of ARCS Data Fabric deployed;
- First ARCS Affiliate signs on;
- Formal engagement with CAUDIT established and first joint activities undertaken;
- Formal cooperative relationships with New Zealand counterparts established and activated.

Before 1 January 2009:

- Full functionality of ARCS Data Fabric deployed and available;
- Enhanced compute grid, GRISU and related services deployed, operating and documented;
- Possible formal establishment of a Northern Territory MARCS and signing on to the ARCS Collaboration Agreement;
- First ARCS Internships offered and accepted with internships underway;
- Second and third ARCS Affiliates sign on.

Before 1 April 2009:

- Review of performance of ARCS on a service-by-service basis using a suite of measures designed to establish: growth of user base by absolute number; distribution of user base by discipline/community; user satisfaction; user participation and engagement with ARCS.

Measures

During the Period a number of steps will be taken to measure and improve the success and impact of the ARCS tools and services. These will include the monitoring of customer satisfaction as well as measuring the impact of services, the rate of new uptake of services and tools, the reach of the dissemination of knowledge and expertise into the research communities, the quality of services, the responsiveness of teams to new requirements and the implementation of change management practices to maintain production services at a professional level.

Measures will include, but are not limited to:

- Quarterly analysis of service usage by the Services Teams with a focus on demonstrating impact into new research areas and communities;
- Annual user satisfaction surveys, carried out before April each year on a service by service basis;
- Written feedback from the ARCS User Reference Group;
- Invited submissions from a significant cross-section of the major research communities, including the NCRIS Capability Areas, as well as established discipline areas;
- Invited feedback from AeRIC, other national eResearch Service Providers, DIISR and other key stakeholder communities.