**EGI-InSPIRE**

Annual Report on quality status

**EU DELIVERABLE: D1.11**

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| Abstract  This document reports on the implementation of the EGI-InSPIRE quality assurance plan during the third year of the project. It reviews the main quality assurance mechanisms foreseen in the quality plan, analyses results and proposes some improvements for the next period. |

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1. Document Log

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1. Application area

This document is a formal deliverable for the European Commission, applicable to all members of the EGI-InSPIRE project, beneficiaries and Joint Research Unit members, as well as its collaborating projects.

1. Document amendment procedure

Amendments, comments and suggestions should be sent to the authors. The procedures documented in the EGI-InSPIRE “Document Management Procedure” will be followed:  
<https://wiki.egi.eu/wiki/Procedures>

1. Terminology

A complete project glossary is provided at the following page: <http://www.egi.eu/about/glossary/>.

1. PROJECT SUMMARY

To support science and innovation, a lasting operational model for e-Science is needed − both for coordinating the infrastructure and for delivering integrated services that cross national borders. The EGI-InSPIRE project will support the transition from a project-based system to a sustainable pan-European e-Infrastructure, by supporting ‘grids’ of high-performance computing (HPC) and high-throughput computing (HTC) resources. EGI-InSPIRE will also be ideally placed to integrate new Distributed Computing Infrastructures (DCIs) such as clouds, supercomputing networks and desktop grids, to benefit user communities within the European Research Area.

EGI-InSPIRE will collect user requirements and provide support for the current and potential new user communities, for example within the ESFRI projects. Additional support will also be given to the current heavy users of the infrastructure, such as high energy physics, computational chemistry and life sciences, as they move their critical services and tools from a centralised support model to one driven by their own individual communities. The objectives of the project are:

1. The continued operation and expansion of today’s production infrastructure by transitioning to a governance model and operational infrastructure that can be increasingly sustained outside of specific project funding.
2. The continued support of researchers within Europe and their international collaborators that are using the current production infrastructure.
3. The support for current heavy users of the infrastructure in earth science, astronomy and astrophysics, fusion, computational chemistry and materials science technology, life sciences and high energy physics as they move to sustainable support models for their own communities.
4. Interfaces that expand access to new user communities including new potential heavy users of the infrastructure from the ESFRI projects.
5. Mechanisms to integrate existing infrastructure providers in Europe and around the world into the production infrastructure, so as to provide transparent access to all authorised users.
6. Establish processes and procedures to allow the integration of new DCI technologies (e.g. clouds, volunteer desktop grids) and heterogeneous resources (e.g. HTC and HPC) into a seamless production infrastructure as they mature and demonstrate value to the EGI community.

The EGI community is a federation of independent national and community resource providers, whose resources support specific research communities and international collaborators both within Europe and worldwide. EGI.eu, coordinator of EGI-InSPIRE, brings together partner institutions established within the community to provide a set of essential human and technical services that enable secure integrated access to distributed resources on behalf of the community.

The production infrastructure supports Virtual Research Communities (VRCs) − structured international user communities − that are grouped into specific research domains. VRCs are formally represented within EGI at both a technical and strategic level.

1. EXECUTIVE SUMMARY

This document reports on the implementation of the updated EGI-InSPIRE quality assurance plan, D1.9 [R1] during the third year of the project. It reviews the main quality assurance mechanisms set out in the quality plan, analyses results and proposes some improvements for the next period. This report is a self-assessment of the running of the project and the management tools it uses. It is coupled to the annual reports produced by the individual activities, and also to the Periodic Report for the third period.

The metrics described in this document are used to measure work:

* As an Activity within the project
* Towards the project’s overall objectives
* Towards EGI’s strategic goals outlined in the EGI Strategy Plan

The project level metrics and targets presented in this document correspond to those highlighted in D1.9. Progress towards this original set of project level metrics is described, and areas where updates to the targets are recommended are outlined. The new targets for project level metrics will be described in D1.13 Quality Plan and Project Metrics [R8].

For Project Year 3, strategic level metrics are proposed that align with D2.30 The EGI Strategic Plan [R2]. The Strategic Plan covers the main activities in the areas of community and coordination, operations and virtual research environments. The strategic metrics are designed to highlight the European “value add” of EGI and are aligned with the EGI and EGI.eu’s longer term mission and strategy in order to help the project steer itself, reflect objectively upon current performance with a view to deploying a range of easy-to-reach, growth and stretch targets. The strategy metrics targets will also be presented in D1.13 Quality Plan and Project Metrics.[R8]

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# Introduction

This document reports on the implementation of the EGI-InSPIRE quality assurance plan, D1.9 [R1] during the third year of the project. It reviews the main quality assurance mechanisms set out in the quality plan, analyses results and proposes some improvements for the next period. This report is a self-assessment of the running of the project, the management tools being used and shows an overview of the project metrics and targets. It is coupled to the annual reports produced by the individual activities, and also to the Periodic Report for the third period. Some changes to the project metrics are also discussed, as well as updates to the targets for the project level metrics.

The metrics described in this document are used to measure work:

* As an Activity within the project
* Towards the project’s overall objectives
* Towards EGI’s strategic goals outlined in the EGI Strategy Plan

The project level metrics and targets presented in this document correspond to those highlighted in D1.9. Progress towards this original set of project level metrics is described, and areas where updates to the targets are recommended are outlined. Strategic level metrics are included that align with D2.30 The EGI Strategic Plan [R2]. The Strategic Plan covers the main activities in the areas of community and coordination, operations and virtual research environments. These metrics are designed to highlight the European “value add” of EGI and are aligned with the EGI and EGI.eu’s longer term mission and strategy in order to help the project steer itself, reflect objectively upon current performance and deploy a range of easy-to-reach, growth and stretch targets.

# Quality Assurance organisation status

## QA Management in EGI-InSPIRE

In EGI-InSPIRE, the resources committed to Quality Assurance are provided by NA1 through quality management procedures and processes. Some Quality Assurance effort is also allocated within each activity in order to implement the QA policy and metrics defined in D1.9 Quality Plan and Project Metrics [R1].

The main tasks of the quality functions in NA1 include:

* Develop the Quality and Metrics Plan and update these annually;
* Ensure that agreed quality metrics are applied and measured within the activities;
* Summarise the metrics for the Quarterly and Annual Periodic Reports
* Take quality matters, which cannot be dealt with within the activity, to the AMB or other appropriate body.

### QA wiki site and metrics web pages

The project metrics are summarised each quarter at http://www.egi.eu/about/egi-inspire/metrics/index.html and further metrics can be obtained through the gstat tool[[1]](#footnote-1) and the accounting portal[[2]](#footnote-2). A project metrics portal was released by EGI-InSPIRE JRA1 in PY1, upgraded in PY2 and PY3 and is available at <http://metrics.egi.eu/>. All NGI and EGI.eu metrics and project task metrics are now reported in the metrics portal. Where possible metrics are automatically gathered from operational tools and activity managers and NGIs are requested to validate or modify them as needed. The remaining metrics are manually recorded in the portal.

The full project metrics and activity metrics described in D1.9 are also summarised in the quarterly reports. NGI operational metrics (SA1) are annually gathered and used for the NGI International Task annual assessment [R10]

Further operational tools are available at the operational tools wiki page <https://wiki.egi.eu/wiki/Tools>. Statistic of service levels accomplished by Resource Centres and NGIs are gathered monthly and are accessible on wiki (<https://wiki.egi.eu/wiki/Performance>).

### ITIL

The ITIL® framework has been mentioned in a variety of EGI documents including D1.9 and referenced as a strategic area for improving service management across EGI. ITIL is the most widely accepted approach to IT service management and the de facto standard for operating computer centres in the industrial sector, providing a cohesive set of best practices, drawn from the public and private sectors internationally.

Over the last year, EGI has continued the work to increase the maturity of its service management processes in the areas of operations, policy and software delivery. With the kick-off of the FedSM project[[3]](#footnote-3) where EGI.eu is a client partner, dedicated consultancy was received. One of the main outcomes has been the creation of the EGI.eu service portfolio as a refactoring of the EGI-InSPIRE activities. This portfolio organises the services being provided from an organisational viewpoint and hence regardless of the project structure. The costs of the EGI Global Tasks have also been restructured to map across to the new service portfolio. The finalisation and publication of the portfolio is expected by the end of April with the completion of MS123 Global Task Review [R11]. The service portfolio will also be expanded to include the NGI technical services that are user facing so to build a wider service definition covering the EGI partnership.

Another relevant activity that is being carried out in collaboration with the FedSM project is the definition of the minimum requirements for service management in a federated infrastructure based on the ISO20000 standard[[4]](#footnote-4). A capability maturity model has been also defined together with an implementation plan to assess the current maturity level of EGI.eu and two pilot NGIs involved in the project. Once completed, EGI.eu will conduct a self-assessment following a specific set assessment framework over the next few months and actions will be taken to increase the maturity if needed.

## Project Management

The project management procedures and related materials used within EGI-InSPIRE are based on the successful processes developed during the management of large distributed collaborative projects such as the EGEE series of projects.

### Project overall assessment mechanisms

The following mechanisms have been established by the project to assess the project progress:

* Activity Management Board (AMB) meetings[[5]](#footnote-5);
* Quarterly reports and periodic reports [R3,4,5];
* Project execution plan [R6];
* Deliverables and milestones reviews [R7];
* Metrics web[[6]](#footnote-6) and wiki pages[[7]](#footnote-7);
* Project Management Board meetings;
* External Advisory Committee reports;
* EC annual project reviews.

*Assessment:*

The AMB includes the Activity Managers and key Task Leaders for the project and continues to meet on a weekly basis, with an annual face to face meeting. The meetings have driven the Deliverable and Milestone production and their associated review process, and have also proved to be a useful forum to raise and resolve project issues, and to discuss events. The quarterly reports have also been produced successfully, and the time taken to produce them has stabilised to around 5-6 weeks after the close of the quarter. Metrics are published on the website on a quarterly basis, and further tools are available at the operational tools wiki site for deeper level metrics. Project Management Board meetings were held quarterly. The second EC annual project review was held on 27th and 28th June 2012.

The metrics portal has been upgraded by JRA1 so that more of the metrics generated by multiple NGIs can be gathered online and delivered as a report on a quarterly basis. The metrics portal is now available online at <http://metrics.egi.eu/>.

*Changes proposed for Year Four:*

The overall project assessment mechanisms have matured during PY3, and the roles of each body will remain similar for PY4, with the AMB driving the logistics of the project management, and the PMB dealing with project issues. The quality assurance activity will continue to gather NGI level metrics through the metrics portal and assess progress towards the strategic metrics discussed in Section 4.

### Document management procedure

The document management procedure includes the following elements, described in [R1]:

* Document repository (DocDB);
* Naming conventions;
* Document metadata;
* Repository metadata.

*Assessment:*

The DocDB has functioned effectively as the document storage repository for all official EGI publications since the start of the project, including deliverables, milestones, review documents, presentations, reports and committee minutes. Statistics for the DocDB are listed at <https://documents.egi.eu/public/Statistics>. There are currently over 1570 documents and more than 11,900 files in the database, with 1890 registered authors. Guidelines for naming of official documents such as deliverables and milestones are set out in D1.9. The final step in the document review process is for the quality team to check that the conventions have been followed before producing a final pdf of the document for submission to the EC, as well as updating the document version to final, setting the modification and viewing permissions in the DocDB and publishing it to the website. The process for publishing a document with all the necessary metadata is outlined on the wiki[[8]](#footnote-8). The documents have been reviewed to ensure that they have the correct access rights by the correct groups.

*Changes proposed for Year Four:*

The DocDB will continue as the official repository for the EGI-InSPIRE documents. The topics will be expanded to include metadata relating to other projects in which EGI.eu is participating.

### Document review procedure

The formal outputs from the project, in the form of milestones and deliverables pass through a defined review process. The review process is timed to ensure that the output is available to the EC at the end of the project month (PM) that the material is due.

The timetable and detailed processes of the document review procedure are listed on the wiki site at [https://wiki.egi.eu/wiki/Review\_process\_for\_deliverables\_and\_milestones](https://wiki.egi.eu/wiki/Review_process_for_deliverables_and_milestones%20) and are also described in D1.9 [R1].

The review process instigated in PY2 and used in PY3 is summarised below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Time before submission** | **Person** | **Action** | **RT action** |
| >2 months | Project Office | Create DoCDB URLs and enter into RT. Obtain moderator and reviewers from the AMB Chair and add these into the ticket fields and cc on the ticket. Set the DoCDB metadata (see Section 2.4) and the view and modify groups to the inspire-taskleaders and the activity group responsible for the work. | Remains blank and is assigned to Shepherd |
| 7 weeks | Shepherd | Add the editor onto the cc of the ticket. Ensure the editor has provided the table of contents (optionally including notes as to the contents of each section) and the document is stored in DoCDB | Set state to ToC |
| 6 weeks | Shepherd | Shepherd is aware a draft is available in the repository and is under active development with revisions from the contributors | Set state to Draft |
| 5 weeks | Shepherd | The draft is stable and is undergoing review within the activity and is nearly complete | Set state to Internal Review |
| 4 weeks | Shepherd | The document is ready for external review. | Set state to External Review and assign to the PO |
| Immediately | Project Office | PO notifies reviewer(s), moderator and AMB that the document is available for review. Confirm expected review completion date with reviewers | Enter completion date as Due Date in RT |
|  | Project Office | Notify the Editor that review is complete | Set state to Being Revised |
|  | Editor | Notify the PO an updated document is available | Set state to External Review and return to \*\*\* |
|  | Project Office | The external review is complete. Notify the AMB that the document has completed external review | Set state to AMB Review and assign to the AMB Chair |
| 1 week | AMB Chair | The PMB is emailed that the document is available for the PMB to review for 1 week | Set state to PMB Review |
| Deadline | AMB Chair | A clean PDF version of the document is generated by the PO and placed in the document repository with updated meta-data | Set state to With EC |

The roles are summarised below:

**Reviewer:** Responsible for providing a review of the document on the EGI review form so that responses from the document authors to the reviewer can be tracked. A change tracked version of the document can be provided with corrections for spelling, formatting and other minor issues. The reviewer is generally from the activity and organisation that is not responsible for producing the document.

**Moderator:** Responsible for providing a review and deciding in cases of conflicting reviews, which elements of a review must be implemented by the author. The decision to follow or reject a reviewer’s comment must be tracked in the review document. The moderator is normally an EGI-InSPIRE taskleader not from the activity producing the document.

**Editor:** The person from the activity and the partner who is responsible for the document. They may rely on others within the activity to provide the information. The editor cannot be a moderator or reviewer.

**Project Office (PO):** The project office provides administrative support for the process.

**Shepherd:** The shepherd is a member of the AMB who is responsible for overseeing the production of the document. They will work with the Editor to ensure that the work is done in a timely manner, and report to the AMB on its progress. This is normally the activity manager or their deputy.

**AMB Chair:** This is the project director, or their deputy.

*Assessment*

The established review process has run successfully during PY3. The presence of the shepherd role has helped the AMB to track the progress of Deliverables and Milestones where the editor is not within the AMB, and the concurrent external and AMB reviews have also helped to coordinate the input of comments in a more focused way. Drafts of the documents have continued to ready earlier for review, and have been reaching the PMB stage of the process as early, which has meant that the submission time for documents has maintained the improvements seen in PY2. The possible exception to this trend in decreasing review times has been seen at the end of the project year, when several annual reports have been prepared in parallel when the EGI Community Forum was also being held.

*Proposed changes for Year Four:*

The current version of the review process will be continued in PY4 with the aim of maintaining a realistic time for the review process, and ensuring that the first drafts are available from editors as close to the start of the month that they are due as possible. It is particularly important that the final reports at the end of the project are delivered on time.

# Main Project Management Tools

## Document Management Tools

The document management tools and standards recommended for EGI are the following:

* Word processing: MS Word 97-2003
* Spreadsheet: MS Excel 97-2003
* Slides presentation: MS PowerPoint 97-2003
* Document Management tools: DocDB

The following formats are used for exchanging documents:

* doc, xls, ppt
* PDF
* HTML

All official documents must be available in PDF format. Documents produced by OpenSource versions of office software, and/or in OpenSource formats may also be submitted for review, but final documents should be available as pdfs.

Further templates are available from the website[[9]](#footnote-9), a presentation template in MS PowerPoint and LaTeX, and poster templates in MS PowerPoint and Libre Office.

*Assessment*:

Since version control and formatting can become difficult if different file formats are used between versions, the expectation during PY4 is to continue using both of these file formats for document creation and circulation.

*Proposed changes for Year Four:*

Further OpenSource alternatives to MS and OpenOffice.org will be considered for sharing documents if they are requested by the community.

## Project Progress Tracking

For the whole project the project effort is tracked using:

* Project Progress Tracking: PPT (CERN tool, customised for EGI-InSPIRE): <https://pptevm.cern.ch/egi/ui/main.do>

The PPT tool is hosted by CERN and is used by the EGI-InSPIRE project, and other EC-funded projects such as EMI, to track the work of its members across the different work packages and tasks. It manages the online completion of timesheets across the partners. The timesheets submitted are used as the source of data for the quarterly payments to partners, which are calculated based on estimated costs related to the effort recorded during the quarter and the average staff costs. Final adjustments to payments are made through the Form C’s provided by the project partners at the end of each project year, based on real staff costs, and other costs. The Form C’s are audited by the partners’ institutional accountants, and Certificates on the Financial Statements are provided when necessary. All Form Cs are reviewed by the EC’s financial and legal services and any queries resolved through the end of project year NEF session. EGI Global Tasks costs are gathered through a separate spreadsheet, which is completed by partners based on the average or actual costs of providing the global tasks as a whole.

Monitoring of project effort within PPT (and by association the quarterly payments) is carried out by the Work Package leaders, to assess expended effort against planned effort. This analysis at both a work package and a project level is reported through the quarterly and periodic reports, along with any associated deviations from the work plan or project issues.



Figure 2: Task view within PPT showing partners

CERN has provided the PPT tool since the beginning of the project, giving administrators rights to the Project Office team which has enabled them to monitor timesheets declared on the project and analyse data regularly.

CERN will continue to ensure the implementation and maintenance of the tool for the full duration of the EGI-InSPIRE project. Performance and functionality is reviewed once a year during a face to face meeting between the EGI.eu Project Office and the CERN team. The Service and support is on a “best-effort” and “as-is” basis.

*Assessment*:

A second version of PPT (PPT/EU2) was issued by CERN during PY2, and this was tested for EGI-InSPIRE in March 2012. PPT/EU2 represents a complete rewrite of the previous application, due to administrative and technical reasons at CERN. This will provide more flexibility for users and the project office, and will allow the developers to add new features to it as required. The user will be able to fill in time sheets as previously, and each user will have only one time sheet for all the European Projects they are working on to simplify the data entry process. The new version includes a reminder service that will send an email to every user with time sheets that are not submitted and to every supervisor that has any time sheets not validated. However, bugs are being fixed and the new version has not yet been implemented for EGI-InSPIRE but has been used by other EC projects during the last year. The primary benefit of the new version is improved ease of use through a new user interface therefore the delay has not any impact on the operation of the project. The system will be tested again in March 2013, with the current target for migration being 1 May 2013. The upgraded version of PPT should therefore be available for the final year of the project and for preparation of the final reporting period.

*Proposed changes for Year Four:*

The second version of PPT will be used by all project members to track their progress in the project from the start of PY4 if the migration is carried out as planned. CERN will continue to provide regular maintenance of the tool and members database.

## Website and Wiki

* PUBLIC: Dedicated to the general public: <http://www.egi.eu>
* INTERNAL: Wikis dedicated to supporting the technical Activities: <http://wiki.egi.eu>

*Assessment*:

The EGI public website has continued to be developed, with new areas on EGI Champions, services and federated clouds.

The project wiki site[[10]](#footnote-10) has been regularly updated during the course of the project and has been particularly useful in supporting and reporting the work of the Virtual Teams[[11]](#footnote-11).

The EGI website and wiki are hosted and maintained by EGI-InSPIRE partner CESNET. This includes security monitoring and patching, day-to-day maintenance, and more substantial updates to the CMS as were required for the relaunch of the website in PY2. The level of service provided by CESNET for the website, wiki, Indico(see below), document server and other technical services has shown excellent availability and reliability. The very occasional failures have been promptly resolved. The technical support and consultancy has been effective and responsive. There has been one service outage for the EGI.eu DNS (hosted by NIKHEF) during PY3 which was quickly resolved.

*Plans for Year Four:*

Plans for the website and wiki, as well as the other project dissemination channels such as social media sites, will be outlined in more detail in D2.22 Marketing and Communications Plan in PM36 and MS238 Communications Handbook in PM37.

## Meetings

Meetings and related agendas are managed with Indico: <https://www.egi.eu/indico/>. These include EGI Community meetings, EGI Management meetings, such as the OTAG, SCG, USAG and UCB, operations meetings and EGI-InSPIRE meetings, such as the AMB, PMB and CB.

EGI also hosts two large annual events each year, the Community Forum and the Technical Forum.

*Assessment:*

Indico has been used throughout the third year for hosting meetings of the various EGI, EGI.eu and community groups, including the two large annual meetings. An update to Indico took place in PY3, which allowed enhanced sharing of EGI events on online calendars and conference apps such as Conf4Me. Indico continues to offer functionalities such as registration, programme generation, agenda, timetabling, abstract review, email lists of contributors and a permanent repository for documents such minutes, notes, abstracts and presentations. The performance of the Indico tool during the third year has been satisfactory, with no major outages experienced.

*Plans for Year Four:*

Indico will continue to be used to provide meeting planning for EGI.eu and the wider community in the fourth year.

# EGI-InSPIRE Project Metrics

In Years 1 and 2, EGI-InSPIRE defined the following project objectives (PO) as its goals:

* **PO1:** The continued operation and expansion of today’s production infrastructure by transitioning to a governance model and operational infrastructure that can be increasingly sustained outside of specific project funding.
* **PO2:** The continued support of researchers within Europe and their international collaborators that are using the current production infrastructure.
* **PO3:** The support for current heavy users of the infrastructure in Earth Science, Astronomy & Astrophysics, Fusion, Computational Chemistry and Materials Science Technology, Life Sciences and High Energy Physics as they move to sustainable support models for their own communities.
* **PO4:** Interfaces that expand access to new user communities including new potential heavy users of the infrastructure from the ESFRI projects.
* **PO5:** Mechanisms to integrate existing infrastructure providers in Europe and around the world into the production infrastructure so as to provide transparent access to all authorised users.
* **PO6:** Establish processes and procedures to allow the integration of new DCI technologies (e.g. clouds, volunteer desktop grids, etc.) and heterogeneous resources (e.g. HTC and HPC) into a seamless production

Progress towards these objectives was previously monitored through the project’s metrics. Additional metrics are defined to monitor the work of the different activities (work packages).

Therefore the metrics described in this document are used to measure work:

* As an Activity within the project
* Towards the project’s overall objectives (PO1-6)
* Towards EGI’s strategic goals outlined in the EGI Strategy Plan

The original target metrics for the project level metrics are outlined below. The PY3 Targets for each metric have three values. The first figure is a foundation level performance and the two bracketed figures are ideal and stretch targets respectively for that metric:

**Table 1: Target Project Metrics**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project**  **Objectives** | **Objective Summary** | **Metrics** | **Target PY1** | **Achieved  PY1 (PQ4)** | **Target PY2** | **Achieved  PY2**  **(PQ8)** | **Target PY3** |
| **PO1** | Expansion of a nationally based production infrastructure | Number of resource centres in EGI-InSPIRE and integrated partners (M.SA1.Size.1) | 300 | 344 | 330 | 347 | 350 (355)  (355) |
| Number of job slots available in EGI-InSPIRE and integrated partners (M.SA1.Size.2) | 200,000 | 239,895 | 250,000 | 290,300 | 300,000  (325,000)  (333,000) |
| Reliability of resource centre functional services (M.SA1.Operation.5) | 90% | 94.6% | 91% | 94.8% | 95%  (96%)  (97%) |
| Reliability of NGI functional services (MSA1.Operations.4) | N/A |  | N.A |  | 97%  (98.5%)  (99%) |
| Reliability of critical operations tools (MSA1.Operations.6a) | N/A |  | N/A |  | 97%  (98.5%)  (99%) |
| **PO2** | Support of European researchers and international collaborators through VRCs | Number of papers from EGI Users (M.NA2.5) | 50 | 161 | 60 | 82 | 70  (80)  (90) |
| Number of jobs done a day (M.SA1.Usage.1) | 0.5M | 0.96M | 0.53M | 1,265M | 1.2M  (1.4M)  (1.5M) |
| **PO3** | Sustainable support for Heavy User Communities | Number of sites with MPI (M.SA1.Integration.2) | 50 | 96 | 100 | 108 | 120 (130)  (140) |
| Number of users from HUC VOs (M.SA1.VO.6) | 5000 | 7,103 | 5500 | 10,856 | 12,000  (15,000)  (17,000) |
| **PO4** | Addition of new User Communities | Peak number of cores from desktop grids (M.SA1.Integration.3) | 0 | 0 | 0 | 0 | 1,000  (5,000)  (7,500) |
| Number of users from non-HUC VOs (M.SA1.vo.5) | 500 | 4075 | 1000 | 8,518 | 10,000  (12,000)  (13,000) |
| Public events organised (attendee days) (M.NA2.6) | 1500 | 2800 | 2000 | 1400 | 2000  (3000)  (3250) |
| **PO5** | Transparent integration of other infrastructures | MoUs with resource providers (M.NA2.10) | 3 | 1 | 5 | 3 | 4  (5)  (5) |
| **PO6** | Integration of new technologies and resources | Number of HPC resources (M.SA1.Integration.1) | 1 | 49 | 3 | 39 | 50  (50)  (50) |
| Number of resource centres part of the EGI Federated Cloud (M.SA2.19) | 0 | 1 | 1 | 7 | 10  (15)  (20) |

The project level metrics reported in the quarterly reports during PY3, while the EGI Strategic Metrics were being developed are listed below:

**Table 2: Achieved Year Three Project Metrics (PQ9-PQ11)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Project**  **Objectives** | **Objective Summary** | **Metrics** | **PQ9** | **PQ10** | **PQ11** | **Target PY3** |
| **PO1** | Expansion of a nationally based production infrastructure | Number of resource centres in EGI-InSPIRE and integrated partners (M.SA1.Size.1) | 347 | 351 | 315[[12]](#footnote-12) | 350 (355)  (355) |
| Number of job slots available in EGI-InSPIRE and integrated partners (M.SA1.Size.2) | 327,394 | 392,036 | 372,584 | 300,000  (325,000)  (333,000) |
| Reliability of resource centre functional services (M.SA1.Operation.5) | 94.15% | 94.52% | 94.80% | 95%  (96%)  (97%) |
| Reliability of NGI functional services (MSA1.Operations.4) | 98.65 | 95.92 | 99.0 | 97%  (98.5%)  (99%) |
| Reliability of critical operations tools (MSA1.Operations.6a) | NA | NA | 98.6[[13]](#footnote-13) | 97%  (98.5%)  (99%) |
| **PO2** | Support of European researchers and international collaborators through VRCs | Number of papers from EGI Users (M.NA2.5) | 27 | 0 |  | 70  (80)  (90) |
| Number of jobs done a day (M.SA1.Usage.1) | 1.41 | 1.78 | 1.67[[14]](#footnote-14) | 1.2M  (1.4M)  (1.5M) |
| **PO3** | Sustainable support for Heavy User Communities | Number of sites with MPI (M.SA1.Integration.2) | 106 | 87 | 80[[15]](#footnote-15) | 120 (130)  (140) |
| Number of users from HUC VOs (M.SA1.VO.6) | 11,073 | 11,208 | 11,431 | 12,000  (15,000)  (17,000) |
| **PO4** | Addition of new User Communities | Peak number of cores from desktop grids (M.SA1.Integration.3) | NA | 4284 | 5220 | 1,000  (5,000)  (7,500) |
| Number of users from non-HUC VOs (M.SA1.vo.5) | 7,467 | 10,326 | 10,654 | 10,000  (12,000)  (13,000) |
| Public events organised (attendee days) (M.NA2.6)[[16]](#footnote-16) | 418 | 5035 | 726 | 2000  (3000)  (3250) |
| **PO5** | Transparent integration of other infrastructures | MoUs with resource providers (M.NA2.10) | 3 | 3 | 2 | 4  (5)  (5) |
| **PO6** | Integration of new technologies and resources | Number of HPC resources (M.SA1.Integration.1) | 40 | 37 | 42 | 50  (50)  (50) |
| Number of resource centres part of the EGI Federated Cloud (M.SA2.19) | NA | 11 | 14 | 10  (15)  (20) |

Metrics have been measured through manual and automatic means as described in Section 2.1.1, through the wiki pages, gstat tool and the accounting portal. During PY3, the Quality team investigated, with SA1 and JRA1, mechanisms for gathering as many of these metrics through an updated metrics portal as possible, rather than gathering them manually. This has now been implemented for the SA1 work package in PY3 and is used by the NGIs and EGI.eu to report metrics.

*Plans for Year Four:*

The project metrics will continue to be collected during the final year of the EGI-InSPIRE project and used to track the progress of the project’s objectives. At the end of the project and assessment of the effectiveness of these metrics will be made to inform any future activitie.

# EGI Strategic Metrics

The following strategic-level metrics is an update of the metrics defined in the previous Annual Report on Quality (D1.11). Whereas the metrics defined in the EGI Strategic Plan[[17]](#footnote-17) [R2], the new ones incorporates the evolution of the strategic map, and the changes in strategy described in the EGI Engagement Strategy (D2.26) [add reference] and the Sustainability and Business Plan (D2.25) [add reference]. The key areas of the strategy and the project level objectives have been aligned to the metrics using a fourth-generation balanced scorecard[[18]](#footnote-18) methodology, which has been adapted for non-profit organisations. The authors of this document fully acknowledge the comments made by the reviewers on that respect. The initial objective is deep into the adequacy of using such a management tool for an organisation with the particularities of EGI. In order to understand the evolution of the EGI and to track the execution of the strategy, the Balance Scorecard methodology is kept It is based on a fourth-generation balanced scorecard adapted for non-profit organisations that provides an integrated measurement framework for describing and translating strategy through the use of linked performance measures from a number of key perspectives. These perspectives are: Customer, Internal Processes, Employee Learning and Growth, and Financial. The balanced scorecard acts as a measurement system, strategic management system and communication tool.

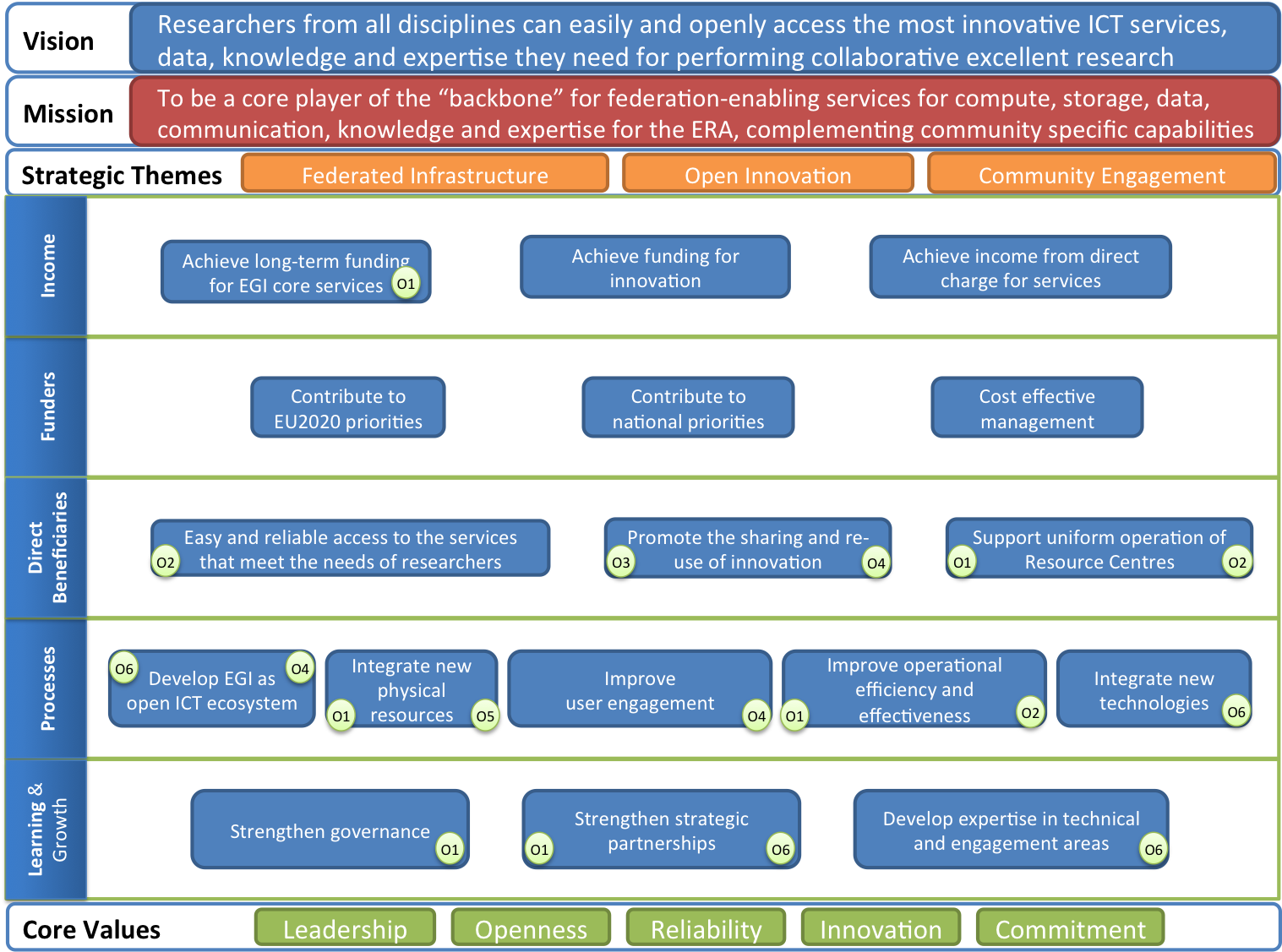
, The measurement framework has been coupled with an updated version of the Strategy Map This is a multi-layered diagram grouping the strategic objectives by perspectives which are naturally linked by a cause-effect relationship. Applying this technique to EGI, the Strategy Map includes also the values that need to be upheld by the people involved in the organisation, the strategic themes (i.e. grouping of objectives that run across the perspectives) as defined in the EGI2020 strategy and with the mission/vision at the top. The Strategy Map is a useful tool to design and communicate a strategy. Given the not-for-profit nature of EGI, the balance scorecard needs to be adapted. The changes made to update the Strategy Map reflects a refined definition of the Vision and Mission, the core values that sustain these, and a redefinition of the processes in the Learning & Growth perspective and the Processes perspectives (see above).

The selected perspectives are:

1. **Learning & Growth:** “how EGI must learn, grow and develop as an organisation”
2. **Processes:** “to satisfy our beneficiaries and funders, what must we focus on and excel at?”
3. **Direct beneficiaries:** “what do our direct beneficiaries want?”
4. **Funders:** “what do our funders want in return for funds?”
5. **Income:** “if we succeed, what will our income look like?”

Figure 1 below presents the EGI Strategy Map with the objectives that have been derived from the EGI Strategic Plan and are cross-referenced to the EGI-InSPIRE project objectives (see number in the circle).

It should be noted that the EGI Strategic Plan is aligned with the Europe 2020 (EU2020)[[19]](#footnote-19) vision. For EGI, the two important key flagship initiatives are the Digital Agenda for Europe (DAE) and the Innovation Union (IU). EGI plays an important role in achieving a number of the key actions defined in these initiatives. The contribution to the Europe 2020 will be captured at an aggregate level, while a more detailed measurement framework will be used to track progress in the other areas and to generate the aggregated metrics.



**Figure 1 - EGI Strategy Map**

The EGI Balanced Scorecards for PY4 and their associated targets are described in the following table. The first figure is a foundation level performance and the two bracketed figures are ideal and stretch targets respectively. Metrics with targets marked ‘N/A’ are provided as a means of tracking performance and do not have any targets associated with them. More details on each of the metrics presented in Table 3 can be found in Appendix II.

*Plans for Year Four:*

The EGI Strategic Metrics have a lifetime that goes beyond of the EGI-InSPIRE project. These metrics will be reviewed towards the end of PY4 based on the continued development and implementation of EGI’s strategy and informed by the experiences (and cost) of metrics collection over the next year.

Table 3 EGI Balanced Scorecard

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Objectives | Objective Description | Performance measures | | Strategic Themes | Targets for Dec 2015 | Target for Dec 2017 | Baseline |
| **Perspective: Learning & Growth** | |  | |  |  |  |  |
| 1. Develop expertise in technical and engagement areas | Develop the human capital within the EGI ecosystem. This should have a positive impact on the technical effectiveness and capacity of the EGI ecosystem, the support that can be offered locally to all stakeholders, and the outreach capacity to scientists in different scientific disciplines. | 1.1 Number of NGI supported training/tutorial attendee days undertaken at NGI events a year.  1.2 Number of NGI supported training/tutorial attendee days undertaken through EGI Forums and dedicated events a year.  1.3 Number of discipline-specific events in which EGI champions participate to introduce EGI.  1.4 Number of projects for creating VTs (or similar activities) meant to address technical challenges of the scientific community. | | C&C | 3000  (4000)  (5000)  200  (300)  (400)  14 |  | 3476  220  14 |
| 2. Strengthen strategic partnerships | Develop strategic relationships with peer-infrastructures and with organisations / projects that can contribute or expand the EGI ecosystem (e.g., broaden technology offer, consulting on IT service management, engaging with developing regions, strategic partnerships) | 2.1 Number of pilot projects for collaboration with peer-infrastructure (such as PRACE, EUDAT) (i.e. in areas such as file transfer and access across e-infrastructures for different disciplines)  2.2 Number of external partners that actively contribute to EGI through defined agreements | | C&C |  |  |  |
| 3.Strengthen governance | Align the EGI governance to sustain the development of an open ecosystem that looks forward to H2020, and to make governance more inclusive, flexible (takes into account changes that members have undergone in the last years) and decisive, which should be achieved by increasing the diversity of the stakeholders. | 3.1 Number of different stakeholders represented in the EGI Council | | C&C | 5  (6)  (7) |  | 6 |
| Perspective: Processes | |  | |  |  |  |  |
| 4. Develop EGI as an open ICT ecosystem | With an open governance model (including well-defined roles, processes and interfaces) the confidence of external actors to build on top of the EGI platforms should improve stimulating healthy competition and expanding the ecosystem. | | 4.1Number of user applications and user-community gateways integrated with the EGI compute and data services. These are provided by the Application Database of EGI | C&C | 495 |  | 495 |
| 5. Integrate new physical resources | Expand the installed physical capacity of EGI (as defined by the EGI-InSPIRE partners) | | 5.1 Total number of job slots (LCPUs) available in EGI  5.2 Installed disk capacity (PB) in EGI  5.3 Installed tape capacity (PB) in EGI | O.I. | 300,000  (325,000)  (333,000)  150  (160)  (170)  150  (160)  (170) |  | 327,394  155.2  150.9 |
| 6. Integrate new technologies | Integrate new functional services into EGI’s Operational Infrastructure in order to increase the diversity and therefore the attractiveness of EGI to more research communities. | | 6.1 Number of different operational service types in EGI as recorded in GOCDB.  6.2 Number of resource centres offering federated cloud services accessible to authorised users (See M.SA2.16)  6.3 Number of active VT projects (or similar activities operating as such) meant for addressing technical outreach issues, in the future it will also include Competence Centres6.4 Number of interoperable distributed data storage services available in EGI | O.I.  VREs | 60  (63)  (66)  10  (15)  (20)  25 |  | 75  9 (PQ10)  25 |
| 7. Improve user engagement | Strengthen local outreach to existing and new research communities to increase awareness of EGI. | | 7.1 Number of international virtual research communities that use EGI services | C&C | 70  (75)  (80) |  | 67  (58 NILs;  9 Champions on 4/4/13) |
| 8. Improve operational efficiency and effectiveness | Improve the reliability and the delivery of the operational infrastructure through improvements in the operational tools and associated processes. | | * + - * 1. 8.1 Number of EGI Global Services meeting published OLAs         2. 8.2 Number of resource centres meeting the Resource Centre OLA. | O.I. | 7  (10)  (12)  300  (310)  (320) |  |  |
| Perspective: Beneficiaries | | |  |  |  |  |  |
| 9. Easy and reliable trans-national access to the services that meet the needs of researchers | Researchers expect services that meet their needs, have a good degree of usability and reliability. The trans-national access is also an essential feature for the ERA. | | 9.1 Number of researchers using EGI’s resources (either directly or through affiliated services – i.e. portals or integrated research infrastructures)  9.2 Percentage of transnational usage (i.e., foreign resources used by users of a given country aggregated across the whole EGI)  9.3 Reliability of EGI services  9.4 Net Promoter Score (NPS) | VREs | 22,000  (25,000)  (27,000)  500  (700)  (800) |  | 21513  + 1720 |
| 10. Ability to share and re-use research outputs | Ability to sharing and reuse of innovation developed within the EGI ecosystem elsewhere in the ecosystem across all stakeholders (e.g. resource centres, research communities) | | * + - * 1. 10.1 Number of relevant software items registered in the EGI AppDB   10.3 Number of relevant appliances (i.e. virtual machines) available in the EGI Marketplace   * + - * 1. 10.4a Number of updates published per Community Platform         2. 10.4b Number of downloads per Community Platform   10.5 Number of agreements established with external research communities to use EGI’s operational tools to monitor their deployed services in their infrastructures | VREs, C&C | 500  (550)  (600)  5  (10)  (20)  3  (4)  (5)  3  (4)  (5)  0  (1)  (2) |  | 453  (PQ11)  11 |
| 11. Support the uniform operation of resource centres | Resource centres providing uniform operation and consistent access to services is a fundamental aspect of a transnational infrastructure. | | 11.1 Number of resource centres that run services for international VOs. | O.I. | 200  (250)  (275) |  |  |
| Perspective: Funders | | | |  |  |  |  |
| 12. Contribute to EU2020 priorities | EGI shows a clear impact on enabling the Digital ERA and other key EU strategic objectives for 2020 (e.g., pooling of resources, open access, open standards, international collaborations) | | 12.1 Number of scientific publications produced using EGI services  12.2 Number of scientific publications produced using EGI services and published as open access  12.3 Number of international virtual research communities that use EGI services  12.4 Number of user-facing services from the EGI service portfolio based on open standards  12.5 Number of European countries part of the EGI infrastructure  12.6 Percentage utilisation through EGI provisioned services by EGI VOs of the job slots (LCPUs) capacity made available for their use | C&C | N/A |  |  |
| 13. Contribute to national priorities | NGIs, by collaborating with EGI, shows a clear impact on contributing to their national priorities | | 13.1 Number of NGIs able to demonstrate strong engagement and integration with the ‘owner’ or funder of their national activities.  13.2 Number of NGIs that are recognised in their national e-Infrastructure strategies or plans. | C&C | 10  (13)  5  (8) |  | Coming from EGI Compendium 2012 |
| 14. Return on Investment  (TO BE REMOVED) | Demonstrate the cost effective management of EGI and utilisation of its resources. | |  | O.I. | N/A  N/A |  | €2.77M  70.44% |
| Perspective: Income | | | |  |  |  |  |
| 15. Achieve funding for innovation | The EGI ecosystem is able to attract funding for innovation of EGI services for the researchers. | | * + - * 1. 15.1 Number of European funded projects in which EGI.eu participate that are supporting innovation         2. 15.2 Amount of money from European funded projects in which EGI.eu participate that are supporting innovation | FI | 7  (10)  X (X) | 7  (10)  X (X) | 7  Ask Celine or see new annual report |
| 16. Achieve long-term funding for EGI core services | Achieve long-term funding for EGI core services that are needed to ensure the integrated operation and coordination of the production infrastructure. The funding mix comes from different sources. | | * + - * 1. 16.1 Number of years for which funding for continued operations of EGI global services have been secured   16.2 Percentage of funding coming from EGI.eu membership fee covering the critical part of EGI Global services  16.3 Percentage of funding coming from EGI.eu membership fee covering the EGI Global services  16.4 Percentage of funding coming from other sources (e.g., EC, user communities) covering the EGI Global services | F.I. | 2  (3)  80%  (100%)  30%  (40%)  70%  (60%) | 3  (5)  100%  (100%)  40%  (50%)  60%  (50%) | 1  80%  30%  70% |
| 17. Achieve income from direct charge for services | Achieve income for direct charge of services to users or their funding agencies (e.g. cloud or grid services, consultancy). | | 17.1 Income from pay-for-use services provided by EGI |  | ? (?) | ? (?) | 0 |

# Conclusion and Future Plans

The project has largely followed the quality plan set out in D1.9 Quality Plan and Metrics successfully, and the project tools used to monitor and analyse progress have been effective. The updated document review process put in place at the start of the year has helped to reduce the time taken for Deliverables and Milestones to pass through the review process, stabilising at about 5-6 weeks. Two large scale meetings, the EGI Technical and EGI Community Forums have been supported using the project tools. The project effort has also been effectively tracked using PPT throughout the year. Updates to PPT are planned for PY4, and the impact of this update on the delivery of the project will be monitored.

This document summarises the progress towards the targets for the project level metrics planned for Year 3. Broadly the targets have been met or exceeded in most cases compared to the plans set out in D1.9, and these targets and the metrics themselves will be revised for Year 4 in response to the reviewers’ comments. The document also discusses the future strategy for tracking the progress of the project towards its strategic objectives. These plans will be outlined in more detail in D1.13 Quality Plan and Metrics for PY4, released in April 2013.

# References

|  |  |
| --- | --- |
| R1 | D1.9 Quality Plan and Project Metrics <https://documents.egi.eu/document/1071> |
| R2 | D2.30 EGI Strategic Plan  <https://documents.egi.eu/document/960> |
| R3 | MS119 Quarterly Report 9: May – July 2012 <https://documents.egi.eu/document/1338> |
| R4 | MS121 Quarterly Report 10: August – October 2012 <https://documents.egi.eu/document/1480> |
| R5 | MS122 Quarterly Report 11: November 2012 – January 2013  <https://documents.egi.eu/document/1620> |
| R6 | MS102 EGI-InSPIRE Execution Plan  <https://documents.egi.eu/document/358> |
| R7 | Deliverable and milestone review documents  <https://documents.egi.eu/document/54> |
| R7 | D2.14 Annual Report on External Relations  <https://documents.egi.eu/document/1069> |
| R8 | D1.13 Quality Plan and Project Metrics  https://documents.egi.eu/document/ |
| R9 | D4.3 EGI Operations Architecture  <https://documents.egi.eu/document/763> |
| R10 | MS124 NGI International Task Review  <https://documents.egi.eu/document/1568> |
| R11 | MS123 Global Task Review  [https://documents.egi.eu/document/1566](https://documents.egi.eu/document/1566" \t "_blank) |

## APPENDIX I: EGI Scorecard Data Dictionary Template

In order to provide a more precise definition of each measure, a descriptive table could be developed supporting the creation of a measure dictionary. Table 5 presents a Scorecard data dictionary template providing full information on the measure and how this should be monitored and interpreted. Following to that, guidelines on how to fill each item are provided following the book “Balanced Scorecard Step-by-Step for Government and Non-profit Agencies” by Paul R. Niven.[[20]](#footnote-20)

Table 5 EGI Scorecard Data Dictionary Template

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ***Perspective:*** e.g. internal | ***Metrics Number:*** | | ***Measure Name:*** | | ***Owner:*** |
| ***Strategic theme:*** | | ***Objective: e.g.*** Develop technical expertise  ***Description:*** | | | |
| ***Measure Description:*** | | | | | |
| ***Lag/Lead:*** | ***Frequency*:** e.g**.** yearly, quarterly | ***Unit type:*** e.g. numbers, percentages | | | ***Polarity:*** e.g.high values are positive |
| ***Formula:*** describes specific element of calculation | | | | | |
| ***Data Source:*** | | ***Data Collector:*** | | | |
| ***Data Quality:*** High/Low/Medium | | ***Collection Quality:*** High/Low/Medium | | | |
| ***Baseline:*** | | ***Stretch Target:*** | | ***Ideal Target:*** | |
| ***Target rationale:*** How did you define Stretch and Ideal Target | | ***Initiatives:***  Current and anticipated initiatives to reach defined target  1.  2. | | | |

* **Perspective**

Displays the perspective under which the measure falls. For EGI the Perspectives are: Learning & Growth, Internal, Direct Beneficiaries, Funders and Income.

* **Measure Number**

All performance metrics should be provided a number. The number is important should you later choose an automated reporting system. In EGI, it is a notation based on two numbers “X.Y” where X is the number of the objective, while Y is the relative number of the related measure.

* **Measure Name**

The measure name should be brief, but descriptive. For EGI it is the name of performance measure.

* **Owner**

The Balanced Scorecard also should create a climate of accountability for results. Central to the idea of accountability is the establishment of owners for each and every measure. Simply put, the owner is the individual responsible for results. Should the indicator’s performance begin to decline, it is the owner and specific individual you look to for answers and a plan to bring results back in line with expectations. If the metrics are assigned to functions and titles people will tend to hide behind it, but an employee who sees his or her name associated with the performance of a key organizational measure will tend to promote more action and accountability than will a job function.

* **Strategic theme**

Displays the specific strategic theme within the EGI Strategy that the measure will positively influence. There are three strategic themes in the EGI Strategy: Operational Infrastructure, Virtual Research Environments and Communication & Coordination.

* **Objective and Objective Description**

The strategic objective to which the measure refers and its description

* **Measure Description**

Concise and accurate description that captures the essence of the measure so that anyone reading it will be able to quickly grasp why the measure is critical to EGI.

* **Lag/Lead**

Outline whether the measure is a core outcome indicator or a performance driver. Lag: if it measures the focus on results at the end of a time period. Normally characterising historical performance. It usually lacks predictive power (e.g. number of resource centres meeting OLA) Lead: if it measures the “drive” or lead to the performance of lag measures. It normally measures intermediate processes and activities. May prove difficult to identify and capture, often there are new measures with no history at the organization (e.g., number of active champions).

* **Frequency**

How often do you plan to report performance on this measure? Do you want to report performance on a daily, weekly, monthly, quarterly, semi-annual, or annual basis?

* **Unit Type**

This characteristic identifies how the measure will be expressed. Commonly used unit types include numbers, dollars, and percentages.

* **Polarity**

When assessing the performance of a measure, you need to know whether high values reflect good or bad performance. In most cases, this is very straightforward. Lower costs and increased employee satisfaction are good, while a high value for complaints reflects performance that requires improvement.

* **Formula**

In the formula box, provide the specific elements of the calculation for the performance measure.

* **Data Source**

Every measure must be derived from somewhere—an existing management report, EGI AppDB, DocDB, Training Marketplace, Compendium etc. In this section you should rigorously attempt to supply as detailed information as possible. If the information is sourced from a current report, what is the report titled, and on which line number does the specific information reside? Also, when can you access the data? The more information you provide here, the easier it will be to begin actually producing Balanced Scorecard reports with real data. Conversely, if you provide vague data sources, or no information at all, you will find it exceedingly difficult to report on the measure later.

* **Data Quality**

Data quality is related to reliability of provided data.

* **Collection Quality**

Use this area of the template to comment on the condition of the data you expect to use when reporting Scorecard results. If the data is produced automatically from a source system, and can be easily accessed, it can be considered “high.” If, however, you rely on an analyst’s Word document that is in turn based on some other colleague’s Access database numbers that emanate from an old legacy system, then you may consider the quality “low.” This is related to collection quality. Data quality is related to reliability of provided data.

* **Data Collector**

You identified the owner of the measure as that individual who is accountable for results. Often, this is not the person you would expect to provide the actual performance data.

* **Baseline**

Users of the Balanced Scorecard will be very interested in the current level of performance for all metrics. For those owning the challenge of developing targets, the baseline is critical in their work.

* **Base target**

The base target is the minimum value to achieve to consider a successful performance in the real circumstances.

* **Stretch Target**

The stretch target is used to set higher expectations that cannot be met by simply by working a little harder or a little smarter. To achieve a stretch target, people have to invent new strategies, new incentives—entirely new ways of achieving their purpose.

* **Target Rationale**

This will apply only to those metrics for which you currently have a performance target. The rationale provides users with background on how you arrived at the particular target(s). Did it come from an executive planning retreat? Is it an incremental improvement based on historical results? Was it based on a mandate? For people to galvanise around the achievement of a target, they need to know how it was developed, and that while it may represent a stretch, it isn’t merely wishful thinking on the part of an overzealous senior management team.

* **Initiatives**

At any given time, EGI.eu may be simultaneously engaged in dozens of initiatives or the mini projects. Often, only those closest to the project know anything about it, hence any possible synergies between initiatives are never realized. The Scorecard provides an opportunity to evaluate these initiatives in the context of their strategic significance. If a Virtual Team or mini project, that EGI.eu is participating in, cannot be linked to the successful accomplishment of your strategy, the question has to be asked why is EGI participating in it? Use this section of the template to map current or anticipated initiatives to specific performance metrics.

1. http://gstat.egi.eu [↑](#footnote-ref-1)
2. http://accounting.egi.eu [↑](#footnote-ref-2)
3. http://www.fedsm.eu/ [↑](#footnote-ref-3)
4. http://en.wikipedia.org/wiki/ISO/IEC\_20000 [↑](#footnote-ref-4)
5. <https://www.egi.eu/indico/categoryDisplay.py?categId=13> [↑](#footnote-ref-5)
6. <http://www.egi.eu/projects/egi-inspire/metrics/> [↑](#footnote-ref-6)
7. https://wiki.egi.eu/wiki/Tools [↑](#footnote-ref-7)
8. https://wiki.egi.eu/wiki/Metadata\_management [↑](#footnote-ref-8)
9. <http://www.egi.eu/about/egi-inspire/templates/> [↑](#footnote-ref-9)
10. <https://wiki.egi.eu/wiki/Main_Page> [↑](#footnote-ref-10)
11. https://wiki.egi.eu/wiki/Virtual\_Team\_Projects [↑](#footnote-ref-11)
12. This value does not include 30 Resource Centres that are temporarily suspended due to on-going maintenance work to update the locally deployed middleware. During PQ10 and 11 a major upgrade campaign was undertaken to retire unsupported gLite products. In addition to this, two Operations Centres terminated their operations in PQ11 because of sustainability problems: Ireland and Iniciativa de Grid de America Latina – Caribe (IGALC). All Resource Centres operated in Ireland were decommissioned while a fraction of the IGALC ones are now operated by the second Operations Centre active in the region (ROC Latin America). The remaining fraction of IGAL Resource Centres was decommissioned. [↑](#footnote-ref-12)
13. Monitoring of the EGI.eu core operations tools was rolled to production in October 2012. Reports for the previous quarters are not available. [↑](#footnote-ref-13)
14. 1.67 Mjob/day only includes grid jobs. This value increases to 2.25 Mjob/day when also including job submitted locally to clusters. [↑](#footnote-ref-14)
15. The number of Resource Centres supporting parallel computation has been steadily increasing in PY2, but this trend changed in PY3 as the number remained constant during the latest reporting period. In PY3 a new framework for the tracking of Resource Centres supporting MPI was devised and approved, and it will be rolled to production at the beginning of PY4. The new framework will allow for a more accurate estimation of this metric. [↑](#footnote-ref-15)
16. This metrics is expressed in the number of participants in a one-day event. For example, 2000 translates to 200 people attending a ten-day event, or 500 people attending a 4-day event [↑](#footnote-ref-16)
17. https://documents.egi.eu/document/1098 [↑](#footnote-ref-17)
18. <http://www.balancedscorecard.org/BSCResources/AbouttheBalancedScorecard/tabid/55/Default.aspx> [↑](#footnote-ref-18)
19. <http://ec.europa.eu/europe2020/index_en.htm> [↑](#footnote-ref-19)
20. http://www.amazon.com/Balanced-Scorecard-Step-Step-Government/dp/0470180021 [↑](#footnote-ref-20)