NETS Retreat
Friday, 8/7/09
8:00 – 5:00pm MDT
Welcome

- Rules
  - No electronic devices (cell phones for emergencies only; laptops for presentations only)
  - Engaged/participate – no napping
  - No side conversation
Welcome

- Schedule
  - Review agenda
    - Changes?
Welcome

Goals

◦ Focus on the next year’s projects – staffing, impacts, issues
◦ Identify areas for improvement – staffing, processes, other
◦ Review NETS – where are we today and where should we be
Welcome

- Questions/comments?
Leadership/Ownership

- **Leadership** is and has been described as the “process of social influence in which one person can enlist the aid and support of others in the accomplishment of a common task”. A definition more inclusive of followers comes from Alan Keith of Genentech who said "Leadership is ultimately about creating a way for people to contribute to making something extraordinary happen."

- Leaders must fulfill three functions: the leader must provide for the well-being of the led, provide a social organization in which people feel relatively secure, and provide a set of beliefs.
Ownership - the state or fact of being an owner

- Defines and maintains project boundaries
- 100% Responsible
- Engaged
- Documents, communicates, initiates
- Buck-stops with owner
- Identifies and communicates appropriate issues to management
Leadership/Ownership

- **Leads communication**
  - Contacts requestor and/or technical contact for clarification/details if needed
  - Calls initial team/project meeting shortly after receipt of WR
    - Sends email to team instead if level of task warrants it
  - Prepare time/cost estimate if required
  - Develops project/task plan with team
    - Develops task list
    - Assigns tasks
    - Schedules tasks on synchronize as appropriate
  - Develops schedule
  - Presents plan to NETS if required
  - Keeps Project/Task on schedule
  - Keeps team, requestor, and technical contact informed of project status
Leadership/Ownership

- **Leads documentation of Project/Task**
  - Assures that individuals come together as a team and reach consensus
    - If consensus is not reached, documents why and what method was used to reach solution
  - Assures that all information needed in the Project/Task is distributed to all team members
  - Keeps minutes/summaries of meetings and progress
  - Reports **progress/milestones** to team, requestor, and management via the WR update system, verbally, or via email where appropriate
  - Updates WR: team (additions/removals), dates, description
  - Opens related WRs as needed
  - Makes sure all **change controls** are sent
  - Labels as required per standard
  - Tests cabling and equipment as needed and saves results per specifications
  - Update/Create Documentation:
    - Procedures
    - Drawings
    - CAD Drawings
    - Forms
    - Others...
  - Reports Project/Task **completion** to team, requestor, and management via the WR update system, verbally, or via email where appropriate
  - Closes all WRs
Leadership/Ownership

Procurement

- Researches materials, supplies, and equipment as required
- Orders necessary materials
- Maintains Project/Task inventory as necessary
- Defines storage/staging area
- RMA process
Leadership/Ownership

• General
  ◦ Quality control
  ◦ Final clear up/inspection
  ◦ Verify user acceptance
Leadership/Ownership

- Provides direction
- Mentors and coaches others
- Balances team and individual work
- Manages shortages and/or gaps in resources
- Alignment with organization values/mission
- Interfaces with community
- Handles conflict resolution
Management expectations

- **Go-to person**
- Informs regularly of project status
- Informed as needed of any project issues
- Don’t want any surprises
- Don’t want any problems caused by NETS
Discussion
Wrap-up/Next Steps/Action Items

- Send all slides to Chris to post
- Tool to manage projects – MicroSoft Project?
  - Who manages
  - Create draft
- MSS back-up – check status
- Replace hypermail w/ searchable mechanism
- Recurring blue/yellow review – quarterly
- Quote attachments on PR
- BPoP lead on matrix?