MINUTES OF THE METRICS and EVALUATION WORKING GROUP
TELECON
Friday, 23 June 2000 2 PM EDT

Members Present: Frank Lindsay, Chair; Howard Burrows; Richard Chinman; Aaron Engel; Michael Goodman; Ken Keiser; Anita Komlodi; Steve Miley; Silvia Nittel; Catherine Plaisant; Rob Raskin; Ty Wilson. Others Present: Dave Etter, Chair of SCCE; Alan Ward, Front Office.

Update on Current Metrics Activities

Frank Lindsay began this meeting by given a review of what has been done to date in terms of Metrics collection. He pointed out that even though he is serving as chair, most of the "grunt" work on this task is done by Catherine Plaisant and Anita Komlodi. What was desired initially was a way to bring together information on the various ESIPs activities to report back to NASA. Our main audience to this point has been Martha Maiden and Alex Tuyahov at NASA Headquarters. Catherine added that she hopes that our audience will be broadening to include other ESIPs so that individual Federation partners can learn from what other partners are doing.

Current Metrics (What Data is On-Hand)

The process to date has not been painless or completely smooth. Essentially, Martha selected four metrics for the ESIPs to consider. These four metrics were a subset of the ten metrics that each of the DAACs have to consider. The process has been somewhat confusing as ESIPs struggle to answer such questions as, "What constitutes a user?" Catherine Plaisant went over some of what has been collected to date.

How Current Metrics Were Selected (Timing of metrics reporting)

Some of the ESIPs weren't able to answer the original four metrics submitted by Martha. Therefore, the scope of the evaluation had to be broadened to encompass the activities of all of the ESIPs. Some effort went into coordinating with the DAACs and learning from what they have done in terms of Metrics collection. An issue that came out of that dialogue was to look not only at the number of products but also the volume of products. Expanding the metrics complicates the process in the sense that there are more fields to keep track of but it does do a better job of covering all the ESIPs.

To date, the current effort at UMD has focused on the ESIP IIs. ESIP IIIs have to submit their own metrics to Alex Tuyahov. Frank asked Ty Wilson if UMAC has done the ESIP III report as of yet? Wilson explained that UMAC is in a state of flux at present. The person that has been working on Metrics has left the organization and he is covering the position until a replacement can be hired. Consequently, they have not yet filed any of these reports and can't offer much in the way of comments.
Catherine commented that "apples and oranges" are coming back. That is to say, the results received are not standardized. They are not even standardized on the reporting interval. **This led to a discussion on the subject of choosing a reporting interval that works best for Federation partners.** Frank wanted the group's input on this question. Should submissions be monthly, quarterly or yearly? John Townshend, Federation President, seems to be of the mindset that quarterly reports are best but others have expressed different views. Someone commented that the DAACs do submit their Metrics on a monthly basis and that it might be nice to match them - especially since they are all Federation partners. Catherine thinks that a monthly report would be great but that in practical terms, many ESIPs cannot (or would not) comply with making such frequent reports. Michael Goodman suggested that perhaps a quarterly submission should be made but the information submitted should be broken down by month. Frank seemed to like the suggestion. Bill North doesn't think there is any sort of requirement to match the recording interval of the DAACs since the Metrics information the Federation is collecting is not nearly as detailed. However, he strongly encouraged the group not to use yearly reports since their can be all sorts of confusion about whether the reports are made at the end of the Fiscal Year or at the end of the Calendar Year. After discussion, it seemed that people came to the conclusion that if data will be collected each month then it would be best to submit a report each month. That way, folks would be less likely to have to "fudge" the details of their reports, which could end up happening if reports were only submitted quarterly but needed details on the activities on a month-by-month basis. **The chair asked the group members their opinion on whether or not Federation partners would accept a monthly reporting interval.**

Steve Miley did point out that effort has been put forth to develop software for data collection based on a quarterly submission interval. This can be changed but it will require some time. Presently, many of these Metrics submissions are not automated which means that someone has to manually submit this information each time. Consequently, some ESIPs have submitted no Metrics to date. Thus, there are practical reasons why a quarterly submission interval might make more sense, at least at first. Steve Miley suggests we start with quarterly submissions but have the stated goal of moving to monthly submissions as soon as it is practical for all partners to do so. **ACTION:** The Federation Metrics and Evaluation Working Group recommends that quarterly Metrics reports be issued by all partners. Further, the goal is to increase the frequency of reporting to monthly as soon as possible. Technology development may drive how fast the monthly interval can be obtained.

The chair next asked the group members when the first Metrics reports should be collected. Catherine Plaisant suggests that the second quarter be used a test run. For now, the effort will still be confined to the ESIP IIs though ESIP IIIIs are welcome to submit information if they desire. Partners should be encouraged to submit reports for review at the New Hampshire meeting to test out the tools that have been developed (see below). If the process goes smoothly, then the first official submission to Martha Maiden could be made with third quarter data in September.

**Overview of On-line Metrics Tools Web form for data submission.** The technology to enable the submission of these Metrics reports has been constructed since the Houston meeting. Steve Miley gave an overview of what has been done. The decision was made
that the best tool to use for submission of these reports was a web form. The debate - revisited today - was over the submission interval. Again, the current tools are designed for quarterly submissions of data. The forms created can be updated and changed in the case of errors in the reports or omissions. Once the data is submitted, it is stored in a database and reports can be generated. View to look at submissions. Catherine Plaisant spoke about this capability. She wanted to get the group’s assessment of how private this information should be? Should the information be open to the public for viewing? Should it be password protected so that only ESIP members can view the submissions? Should it be even more secure so that only members of the ESIP submitting the information can view it? The group seemed to feel that these submissions should not go out to the general public but should be viewable by any of the ESIP partners. Dave Etter added that any report that goes out to the general public needs to be a lot more attractive than these basic reports. No one disagreed with Dave. Bruce Caron did feel that it was a good idea to expose these reports to other ESIP partners but also felt that it was very important, especially for ESIP III, not to release data to the general public. Evaluation resources page. Catherine Plaisant spoke about another URL accessible from the GLCF site. This is where one can find the list of metrics and where "nuggets of success" are to be submitted. At this point, this site is open to the public but it will soon be password protected when submissions begin to come in ACTION: By the time of the next meeting - face-to-face at UNH (see below) - the working group members should test out the various tools and bring any comments and suggestions up at the next meeting.

Steps for Future Tool Enhancements

This discussion is perhaps a bit premature until folks have a chance to test out the tools that were discussed above. Howard Burrows has put forth a suggestion that the Web Forms submission tool be able to parse a text file and folks seemed to agree that this would be a desirable addition.

Preparations for New Hampshire Meeting

The group needed to decide when they should meet during the week of the Assembly meeting in New Hampshire. Choices would seem to be the Monday before the Assembly meeting begins or during one of the three Cluster/Working Group sections designated during the three-day meeting. One of these Cluster/Working Groups sessions is scheduled for Tuesday evening, another for Wednesday morning and the third for Wednesday afternoon. After discussion it was decided that Monday afternoon would not be good for numerous members since the three Standing Committees are holding meetings during that time. The group decided to request a room during the Wednesday afternoon Cluster/Working Group Session.

Agenda Items for Meeting

The chair wanted to briefly discuss items that members felt should be agenda items at the MEWG meeting at UNH. The following were ideas that came up.
• **Discussion of what standards to adapt.** What are accepted metrics? What are accepted input methodologies? The general feeling here was that if this group could come to some consensus, it might be easier to get the whole Federation to sign on.

• **Discussion of the subject of "Error Tracking".** Catherine Plaisant reports that Vanessa Griffin apparently is interested in this and will be in attendance at the UNH Meeting.

• **Discussion of how Federation Metrics reports will be used.** The group should take some time to talk with Martha - who ultimately reviews this information. Decisions need to be made on what type of data she needs to prove that "the whole is greater than the sum of its parts" which is the ultimate test of the Federation's success.

• **Discussion of how to best take advantage of existing tools such as GCMD and Mercury.** These tools already exist and it is not desirable to waste time inventing tools if there are tools that can be used already.

• **Discussion of "nuggets of success".** It's important that there be an easy way to report successes and for Martha to get her hands on the data. Figure how best to promote the fact that we need these stories to be submitted. Howard Burrows says, "Nuggets are the best thing going for us." He cited the example that Dave Jones and Richard Chinman presented at the ESIP II Technical Review as the kind of things that Martha really wants to hear about. These are the things that she (or other Federation members) can use in justifying the continued funding of the Federation to Ghassem Asrar and Dan Golden.

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