



**Planning Systems at
Gemini Observatory**

NSF Large Facilities Conference - May 2010

ProfileXT™

CONFIDENTIAL
PLACEMENT REPORT
Sunday, September 20, 2009

Doug Simons
Gemini/Director-Gemini Observatory

Segue Strategies
1378 Honokahua Street
Honolulu, HI 96925
808-395-3955

Pattern Date: 9/20/2009 7:15:33 PM



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Profiles Team Analysis™

CONFIDENTIAL
TEAM ANALYSIS REPORT
Monday, July 6, 2009

Doug Simons - Team Leader

Gemini

Segue Strategies
1378 Honokahua Street
Honolulu, HI 96925
808-395-3955

TEAM ANALYSIS REPORT

TEAM LEADER: Doug Simons

Gemini

This Report has four sections:

- Section I - Team Balance Table** - A visual representation of the distribution of the factors essential to team success, indicating your team's strengths and may be lacking.
- Section II - Overall Team Balance Table** - Lists of factors that are (1) well represented and (2) not well represented on your team. Characteristics missing from are described to increase your awareness of possible problems.
- Section III - Behavioral Factors** - This section describes the characteristics of team members and suggests considerations for leading the team.
- Section IV - Team Leader Action Summary** - This summary provides a convenient of reference to remind you which team members have strengths you can lead the team to the successful attainment of its purpose.

Myers-Briggs Type Indicator

Interpretive Report prepared for:

Doug Simons

The MBTI is “a
designed to measure psychological
how people perceive the world and

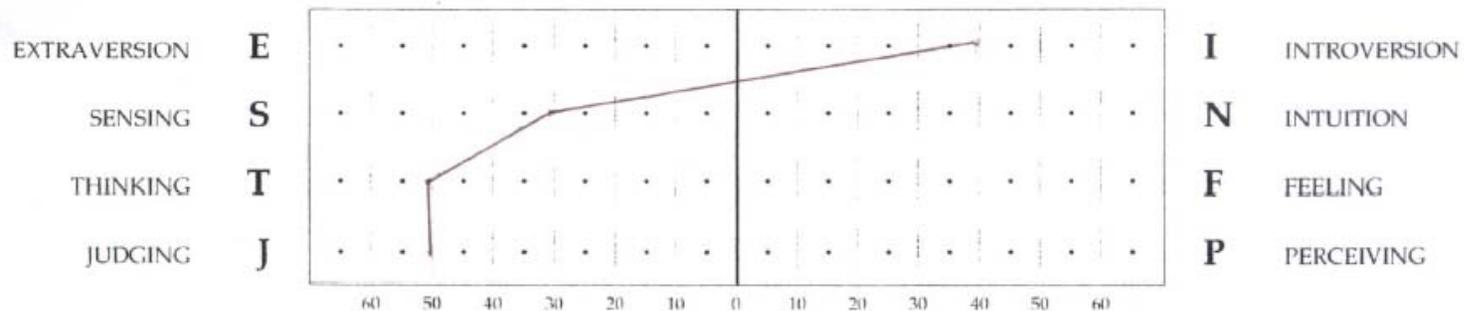
My Myers-Briggs Type Indicator (MBTI)

The four letters show your Reported Type, which is the combination of the four preferences you chose. There are sixteen possible types.

REPORTED TYPE: **ISTJ**

Preference scores show how consistently you chose one preference over the other; high scores usually mean a clear preference. Preference scores do *not* measure abilities or development.

PREFERENCE SCORES: 39 | 31 | 51 | 51



“Serious, quiet, success by concentration and thoroughness. Practical, orderly, matter-of-fact, logical, realistic, and dependable. See to it that everything is well organized. Take responsibility. Make up their own minds as to what should be accomplished and work toward it steadily, regardless of protests or distractions.”



Before I Hit the Shower in the Morning...





Some Common Complaints About Planning

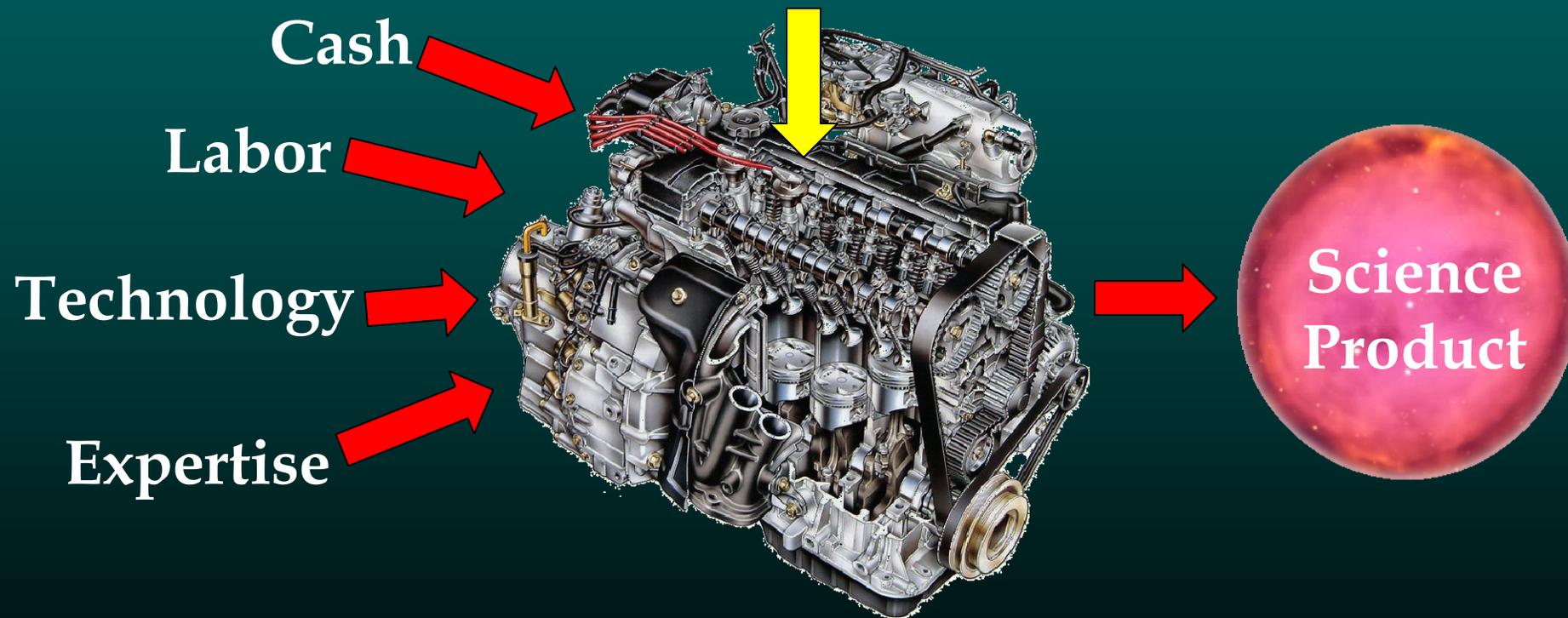
- * "This only makes things more complicated and slower"
- * "Can't we just get on with the job?"
- * "I don't have time to plan!"
- * "I can't even find the time to plan how to plan"



Planning as a "Throttle" on Your Engine



Planning



Planning helps define the "burn rate" of our resources to ensure optimal performance and sustainability for the "long haul"

- * Planning is an essential catalyst in the working culture of any organization
- * Helps establish -
 - * Accountability
 - * Responsibility
 - * Organizational Integrity

In simple terms, at Gemini this means –

“Say what you’ll do then do what you said”

**Develop
New Capabilities**

**Our
Science
Product**

**Maintain
Facilities**

**Preserve
Operations**





Planning at Gemini in the "Construction Days"

- * Planning systems used at Gemini during our construction period were aggressively managed and executed as we strived to complete 2 telescopes on schedule and budget
- * As we entered our operations phase though, the emphasis on planning waned...



1996



1997

So what planning is done now at Gemini?



Planning Guide

- ✦ Early in the process of developing our planning system, we crafted the *"Observatory Planning Guide"*
- ✦ Updated annually as we refine the process, describes the nuts-n-bolts of our planning system
- ✦ Gets everyone "on the same page" about the steps involved, deadlines, requirements, etc.



"We teach humanity about the Universe"

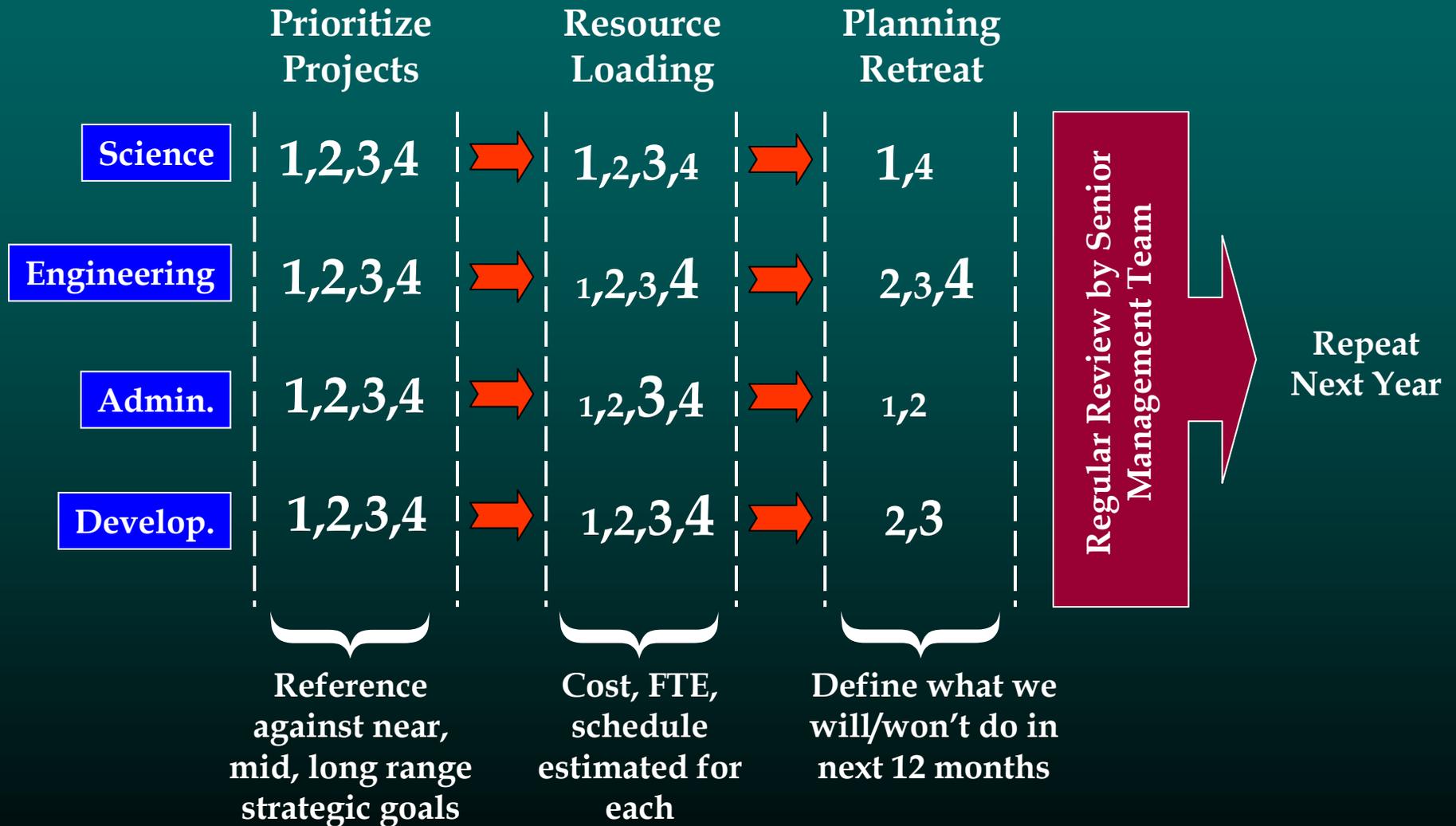
ANNUAL OBSERVATORY PLANNING GUIDE: PROCESS & REQUIREMENTS

Gustavo Arriagada
Dennis Crabtree
Joe Jensen
Polly Roth
Jean-Rene Roy
Doug Simons

"We commit to make Gemini a transformational discovery machine..."



Gemini's Planning System in a Snapshot...





Planning System Overview

- * **Planning system is predicated on broad visibility**
 - * **Anyone on staff can use central database to assess plan contents and status of individual projects**
 - * **Contents of plan are published on our web page through our Annual Report**
 - * **Plan execution is tracked regularly and performance is published annually**
- * **Performance evaluations of staff are linked to how well they execute the plan**
 - * **Merit increases and bonuses**
- * **A key part of the planning process is our annual planning retreat...**



From the 2010 Planning Retreat

- * Retreat process is inclusive by involving staff (internal) and Gemini Science Committee & Board (external)
- * Bottom-up and top-down process, to ensure we capture a range of options that also meets our strategic goals
- * Use of fairly sophisticated planning software (Project Insight) provides the “backbone” to the system
- * Plan is predicated upon a thorough analysis of available resources (FTE’s and cash) to “ground” it in reality



The Fast Evolution of our Planning Systems...

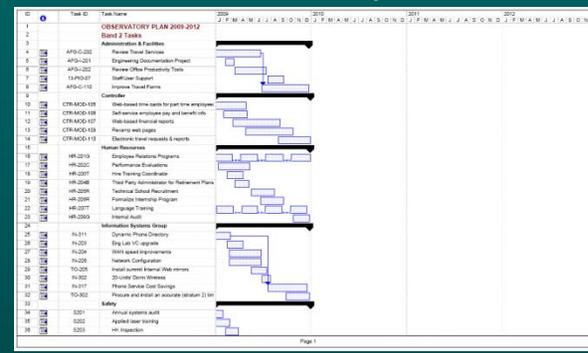
Risk Ledger

RISK	PROBABILITY (P)	IMPACT (I)	RISK LEVEL (R)	MITIGATION STRATEGY	PERIOD
1) 32 position sensors fail at fiber oblique	7	10	70	Spares on hand now - will install modern CVTS sensors ASAP	2006-2007
2) Big belly with MCAO system not working	6	9	54	New MCAO resource allocation structure to help ensure resource	2006-2007
3) Fail to commission GN AO AGS for regular science operation	5	9	45	Maintain high priority and increase depth of AO team	2006-2007
4) Fail to balance workload & resources of science operations side with people development	5	9	45	Overhead how Gemini defines observatory-wide priorities	2006-2010
5) Technical & management support for new instruments, observatory resources	6	7	42	Temp hiring of expertise, cross training	2006-2010
6) Cannot promote two telescopes use observatory concept	6	7	42	Increase N/S staff exchange in various ways	2006-2010
7) Data Flow Project overachieve N/S/W resources and impacts operations	5	8	40	Recruitment of AD for Sci Ops and Lead Scientist; set resource priorities	2006-2007
8) Reliability of several telescopes - sub-systems & instruments overachieve resources	4	6	24	Replacement, improve maintenance program, increase spare parts pool	2006-2010
9) Fail to revitalize safety program	3	7	21	Hire safety manager - make safety part of cultural change	2006-2010
10) Natural disaster badly damage observatory (earthquake or hurricane)	1	10	10	Better planning and preparation	2006+

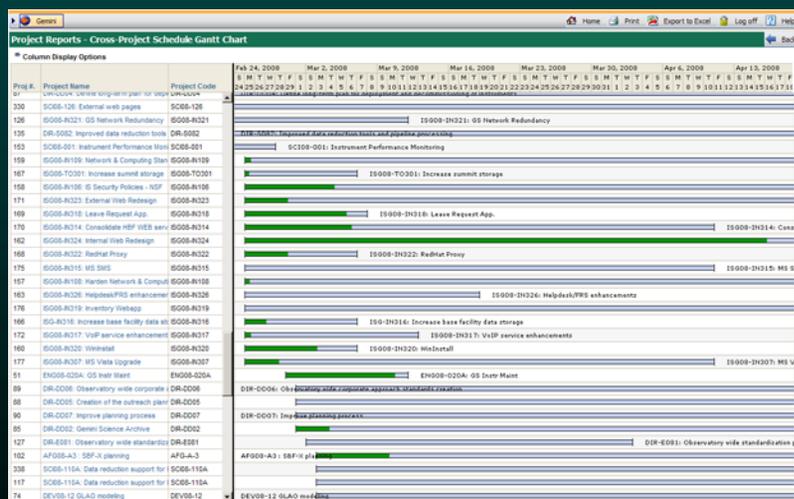
MS Excel

CRONON (W/M/TU)	W	M	TU	W	TH	FR	SAT	SUN	W	M	TU	W	TH	FR	SAT	SUN	W	M	TU	W	TH	FR	SAT	SUN	
BAND 1																									
Administration and Facilities Group (AFG)																									
Implement Driving Safety Plan @ GN																									
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Consider vehicle replacements @ GN																									
1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Review Vehicle Maintenance Issues @ GN																									
1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Improve HVAC @ GN																									
1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Admin Support to MCAO @ GS																									
1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Multiclient/comm @ GS																									
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Promote common transport use @ GS																									
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Review Janitorial Services @ GN																									
1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Improve Travel Forms																									
1	1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Ensure AFU assistance to HSF & reserve in preparation																									
1	1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Maintain systems & facilities Maintenance via Maintenance																									
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Optimize Committee Mtg Planning																									
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Travel Service Improvement																									
1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

MS Project



Project Insight



Reporting

Index	Name	Priority	Total FTE	Score	ENG	SCI	DEV	ADM	Cont	Admin/Finance	Development	Directorate	Engineering	PHD	Safety	Science	Contractor	Unassigned	Report FTE	Index
1	DR05-004 - Energy Planning Oversight & Control	No Band	0.812	4.5	0	1	1	1	No	0.400		0.030	0.301						0.812	1
2	DR05-012 NSF Business Systems Review Preparation & Site Visit	No Band	0.279	0.45	0	0	1	1	No	0.009		0.100							0.279	2
5	DR05-027 2009 Gemini Users' Meeting	No Band	0.000	4.15	0	1	0	0	No			0.125			0.051				0.050	5
6	DR05-003 - Energy Infrastructure	No Band	0.660	3.9	0	1	1	1	No	1.225		0.400	0.020						0.660	6
6	DR05-002 - Local I/A Programming	No Band	0.100	3	0	1	0	0	No									0.100	6	
7	DR05-003 - From Earth To The Universe Exhibit Development	No Band	0.100	3.75	0	0	0	0	No									0.200	0.100	7
8	DR05-004 - Evaluate/Address Web Presence/Planning/Management	No Band	0.100	4.95	0	0	0	0	No									0.300	0.100	8
9	DR05-009 - Create Call Out Policy	No Band	0.163	3.9	0	1	1	1	No	1.341		0.170							0.163	9
9	DR05-002 - Web Redesign Implementation	No Band	0.100	3.2	0	0	0	0	No									0.400	0.100	9
10	DR05-010 - Create On-Call Policy	No Band	0.163	3.9	0	1	1	1	No	1.458		0.222							0.163	10
10	DR05-006 - Publication/Press/Publications Office/Resources	No Band	0.100	4.55	0	0	0	0	No									0.500	0.100	10
11	DR05-011 - AURA Compensation Study Follow-up Work	No Band	0.349	2.75	0	1	1	1	No	1.713		0.315							0.349	11
11	DR05-007 - Gemini	No Band	0.100	3.75	0	0	0	0	No									0.600	0.100	11

Planning



Project Insight (PI)

Obsvatory P&E > Directorate > 2010 Annual Planning > Logged in as Doug Simons

My Work

Folders

- Development
- Directorate
 - 2008Band_1
 - 2009Band_1
 - 2010 Annual Planning
 - DIR10-001: NSF Funding Proposal Review
 - DIR10-002: Long Range Plan
 - DIR10-003: SPIE 2010
 - DIR10-004: International Agreement Negotiations
 - DIR10-005: MCCWG Staff Training Classes
 - DIR10-006: Establish Concerns/Suggestions Blog
 - DIR10-007: Community Engagement
 - DIR10-007b: Data Reduction Workshop
 - DIR10-008: Tenth Anniversary Celebration
 - DIR10-009: Internal Web Page Portal Redesign and Planning
 - DIR10-010: External Web Page Update
 - DIR10-011: Implementation plan of the new GS summit crew
 - DIR10-012 On call support design and implementation at bot
 - DIR10-013 Implement better support for Instruments
 - DIR10-014 Implement plan to support instrument program

Invoices

DIR10-020: Revised Budget Proposal

Task List

Act.	Name	Status Comment (Last) Comment	Durati...	hh mm	Work Hours	Start Date	End Date
◆	Team meeting	Discuss planning pr...	2h		14.00	Dec 3, 2009 8 AM	Dec 3, 2009 10 AM
◆	Assess Obs-Wide Cost Reduction Options		48d		100.00	Dec 7, 2009 8 AM	Feb 16, 2010 5 PM
◆	Assess New Sci-Op's Models		56d	7h 30m	150.00	Dec 7, 2009 8 AM	Feb 16, 2010 5 PM
◆	Assess Engineering Cost Reductions		56d	7h 30m	180.00	Dec 7, 2009 8 AM	Feb 16, 2010 5 PM
◆	Develop IDF/FDF Options		48d		120.00	Dec 7, 2009 8 AM	Feb 16, 2010 5 PM
◆	NSF Telecon		1d	1h	3.00	Dec 17, 2009 8 AM	Dec 17, 2009 5 PM
◆	Team Meeting	Polly will update us...	1d	1h	14.00	Dec 15, 2009 8 AM	Dec 15, 2009 5 PM
◆	Team Meeting	Discuss in more det...	1d	1h	14.00	Dec 22, 2009 8 AM	Dec 22, 2009 5 PM
◆	NSF Meeting		1d	1h	18.00	Jan 7, 2010 8 AM	Jan 7, 2010 5 PM
◆	Team Meeting		1d	1h	14.00	Jan 11, 2010 8 AM	Jan 11, 2010 5 PM
◆	Team Meeting			4h	14.00	Jan 19, 2010 8 AM	Jan 19, 2010 12 PM
◆	Team Meeting		1d	1h	14.00	Jan 26, 2010 8 AM	Jan 26, 2010 5 PM
◆	Team Meeting		1d	1h	14.00	Feb 1, 2010 8 AM	Feb 1, 2010 5 PM
◆	AURA Board Meeting - Gemini-S		2d	2h 30m	68.00	Feb 2, 2010 8 AM	Feb 3, 2010 5 PM
◆	Team Meeting			4h	14.00	Feb 9, 2010 8 AM	Feb 9, 2010 12 PM
◆	Team Meeting		1d	1h	14.00	Feb 16, 2010 8 AM	Feb 16, 2010 5 PM
◆	Deliver Plan to Board				0.00	Mar 1, 2010 8 AM	Mar 1, 2010 8 AM

- * Web accessible central planning database
- * Stores a wealth of information about each year's observatory plan
- * Gemini customizes this commercial package to meet our specific needs

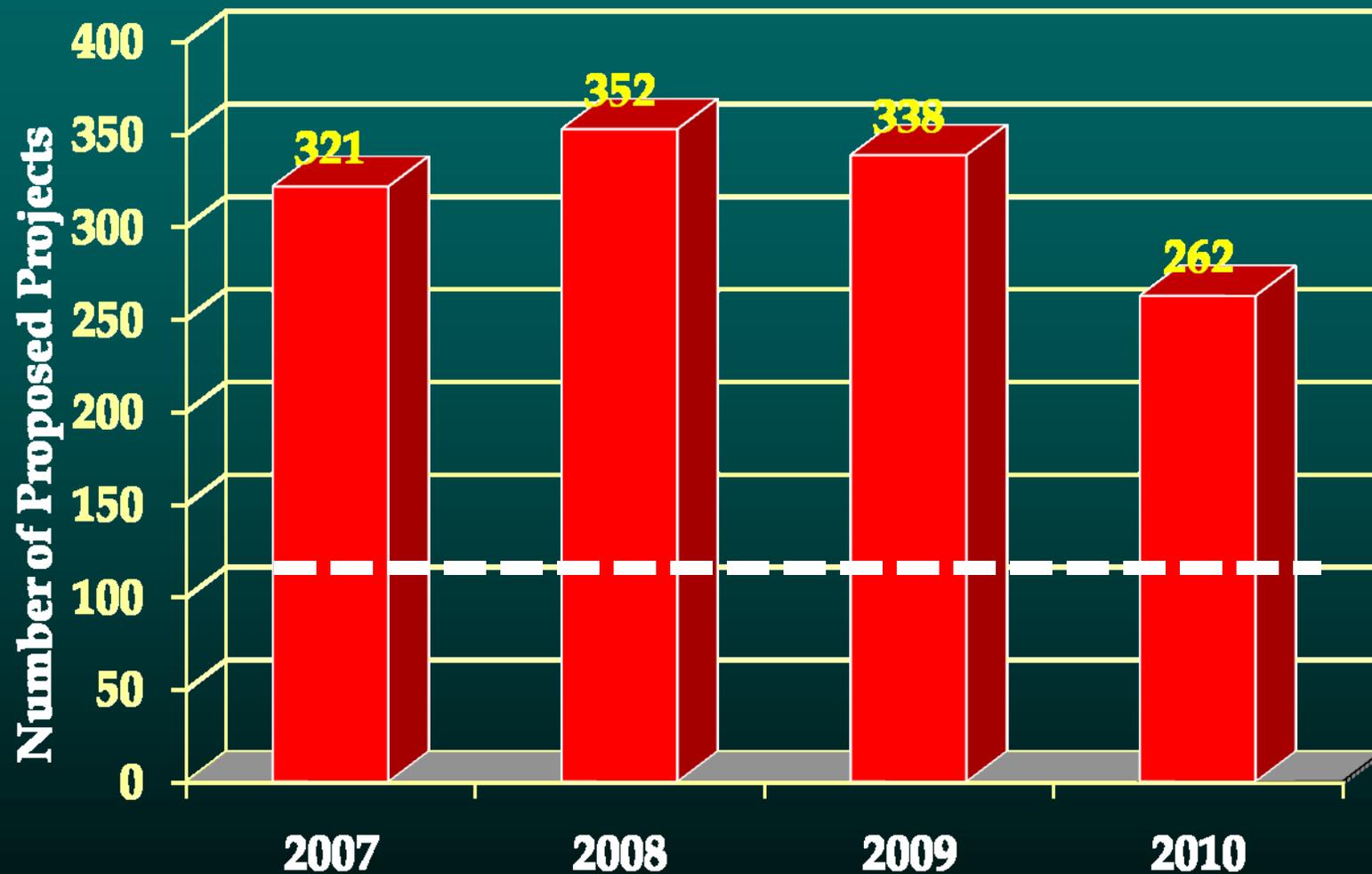


PI Resource Analysis

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
Name	Priori ts	Total Work FTE	Seco re	AFG	ISG	PRO	Director ate	EIG	MSG	OSG	Site	SVG	SYG	SAF	Scientis t	Astrono mer	DAS	DPD	SSA	Contract or	Unassign ed	Report FTE
ENG08-026: New M2 Control H/S	Band 1	1.605	8.9					10.395	2.754			6.828										1.605
ENG09-018: SOAR M1 Coating	No Band	0.13	8.6					10.397		6.77	8.081											0.13
ENG09-143: Implement air-cooled glycol system for	No Band	0.467	8.55					10.473	2.978		8.249											0.467
ENG09-170: Observing Software Enhancements	No Band	3.408	8.5									9.639				0.678						0.338
ENG08-057: Eng Safety Projects	Band 1	3.945	8.35						3.995		9.656											2.424
ENG09-023: Engineering Training Program	No Band	4.709	8.3				0.756	11.24	4.623	7.502	10.912	10.546	1.89									4.709
ENG09-167: O&M Project Tasks (Upgrades or New Developments)	No Band	2.143	7.9				0.824	11.916	5.009	7.549	11.528	10.779										2.027
ENG09-030: Spares procurement	No Band	0.624	7.35				0.848	12.037	5.037	7.734	11.796											0.624
ENG09-016: GS Mirror Coating Preparations (A Tasks)	No Band	3.419	4.75					12.471	5.121	9.395	12.197		1.448	0.24							0.575	3.306
ENG09-017: GS Mirror Coating	No Band	1.019	4.65					12.643	5.379	3.400	12.643		1.85			0.693			0.014			1.019
ENG09-176: Advanced Queue Planning Tool	No Band	0.169	4.55									10.872	1.874			0.746						0.169
ENG09-169: Chopping Improvements/Upgrades	No Band	0.93	4.5					13.036	5.518			11.128	2.06									0.93
ENG09-077: Image Quality Monitoring & Characterization	No Band	1.3	4.4		0.146					9.555		11.431	2.489			0.835	0.291	0.256	0.017			1.3
ENG09-082: Planning Tool Upgrades	No Band	0.205	4.4										2.695									0.205
ENG09-175: TAC Software Requirements	No Band	0.5	4.35									11.896				0.858			0.029			0.5
ENG08-041: Eng Tools Corp. Approach	Band 1	2.07	4.25	0.453																		0.453
ENG09-122: ISS Vibration mitigation	No Band	0.253	4.25		0.155		0.859		5.693				2.753									0.253
ENG09-083: Monitoring for Tel Systems and Instruments (Phase A)	No Band	1.88	4.25		0.283	0.012		13.166	5.696			12.013	3.436									1.073
ENG09-173: GS Laser cutting project	No Band	0.317	4.2		0.297					9.733		12.05	3.46			0.924						0.317
ENG09-161: GS M1 coating 10-year durability	No Band	0.984	4.1					13.238	5.885	10.228	12.806		3.506								0.593	0.985



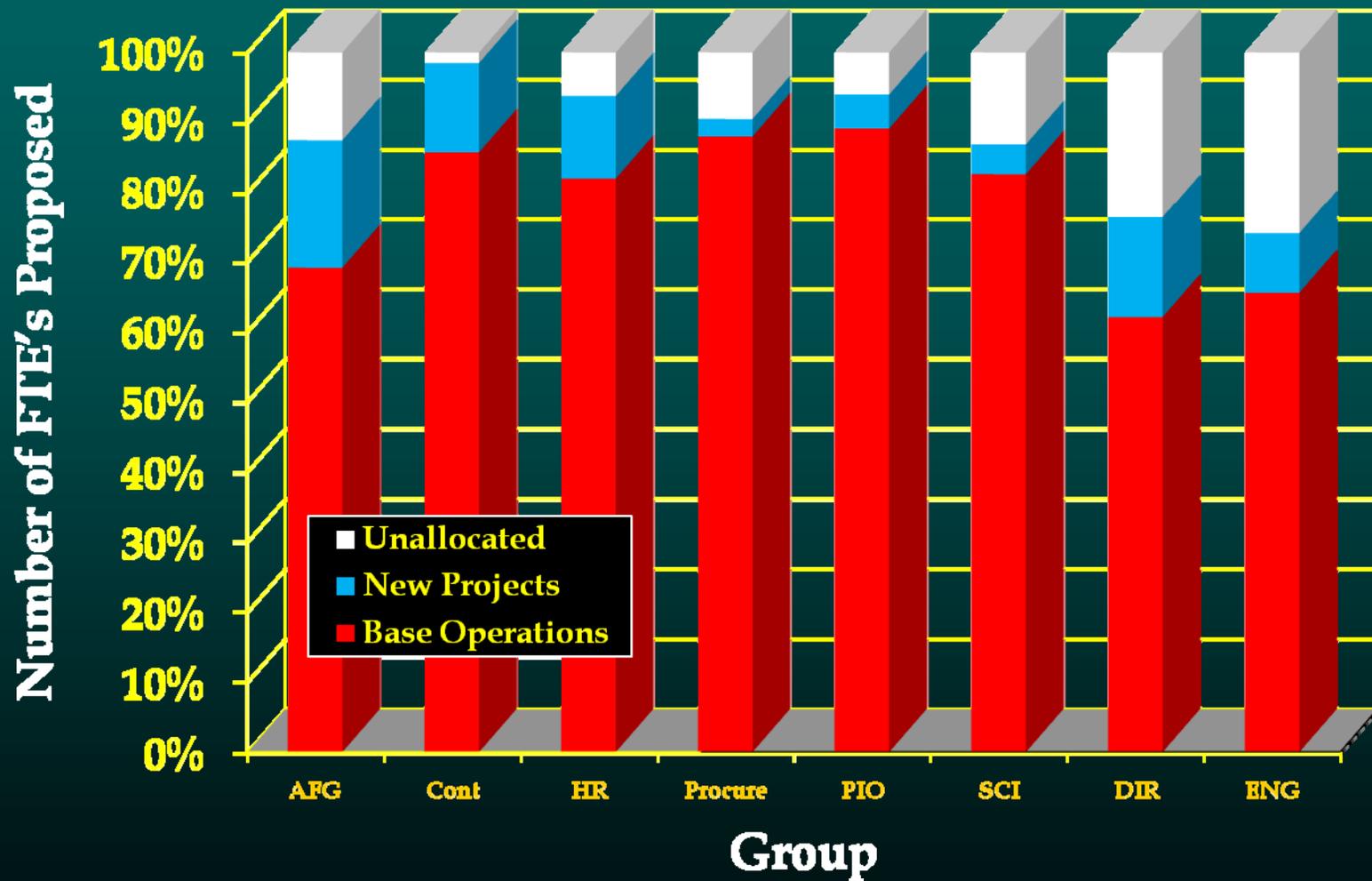
Projects Proposed at Four Gemini Planning Retreats...



In practice only ~1/3 of the projects proposed for each year are approved at the planning retreat for execution...



FTE Distribution Across 2010 Approved Projects



Publishing Our Results

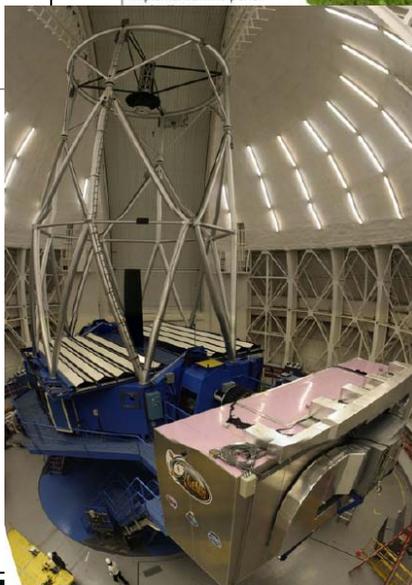
(% Complete for Each Project)

Summary of 2009 Band 1 Projects for the Engineering group (ENG) (Part 1)

Project Name	Project Description	% Compl.
ENG08-012: GN LGS fac improv	The purpose of this project is to finish undone tasks related to LGS system. Most of the tasks are geared towards improving night time efficiency, and fixing faults.	93%
ENG08-031: MCAO (phase 1 and 2)		70%
ENG08-033A: FLAMINGOS 2 AT and Eng Commissioning	FLAMINGOS 2 (AT and on-sky AT support). This project is a candidate to roll over 2009 considering that Aug 2008 AT failed to pass. An AT-2 is considered to be performed on Oct/Nov 2008. F2 AT and Eng commissioning means to have F2 ready for F/16 (No MCAO) on-sky commissioning as Facility Instrument. F2 Science commissioning is a SCI project for 2009.	100%
ENG08-034: Water Vapor Mon upgrade	Water vapor monitor upgrade	100%

Project Name
DIR09-001 WFMOS Agreement
DIR09-003 Energy Initiatives
DIR09-004 Energy Planning Oversight Control
DIR09-005 Hiring and training new Dep Director
DIR09-006 2009 Joint Subaru/Gemini Science Conference
DIR09-007 2009 Gemini Users' Meeting
DIR09-009 Create Call Out Policy
DIR09-010 Create On-Call Policy
DIR09-011 AURA Compensation Study Follow-up Work
DIR09-012 NSF Business Systems Review Preparation & Site Visit
DIR09-020 NSF Funding Proposal
DIR09-030 SPIE 2010
DIR-A083 Cell phone policy

Project Name
AFG09-004 Establish long term Base Facility security measures (access/cameras) at both sites
AFG09-007 AFG Web Page Development
AFG09-008 Review of Processes and Forms
AFG09-009 Planning Process for 2010
AFG09-010 Warehousing Review
AFG09-011 (AFG08-A4) In-house travel ticketing
AFG09-012 Mauna Kea Collective Transport Study



Approach project includes two main sub-ment Planning Tool and the Engineering Tool (DMT). The appropriate DMT is being eploy it during 2008. At the end of 2008 the 98% level of completion and the DMT will be l of the roll over task to 2009 are related to tion in the DMT.

Power Upgrade (ENG05)	67%
	100%

- 011 : Eng AT + ssioning
- 018 : M1 Coating
- 023 : ering Training
- 030 : procurement
- 032 : Repair comp
- 032A : Lenses Reco (R.Oram)



ASS
RE



Publishing Our Results

(Next Year's Projects)

2010 Retreat Approved

Project Name	Project Description
DIR10-020: Revised Budget Proposal	This project options to co first order th the actual le made remain exercise for 2010, the tin are iterated
DIR10-013 Implement better support for Instruments	Develop rev supporting th
DIR10-007b: Data Reduction Workshop	Data reduci their scientifi the Gemini c
DIR10-015: Hiring ADSSciOps	Selection an
DIR10-009: Internal Web Page Portal Redesign and Planning for Site Overhaul	Redesign int it and unifom required for Define the s reorganize c groups. Esti
DIR10-006: Establish Concerns/Suggestions Blog	Establish a d can post cor checking the staff meeting
DIR10-017: Establish availability of in-house resources for development and support of instruments	Some devel cases is not Engineering
DIR10-018: Directorate Operations	This project
DIR10-004: International Agreement Negotiations	This is a pla 2010 when c point we can
DIR10-005: MCCWG Staff Training Classes	Training pro individuals to Five classes and following
DIR10-007: Community Engagement	A multifacete the Gemini C parallel track community r hall meeting speaking en
DIR10-011: Implementation plan of the new GS summit crew work schedule	Elaborate a

2010 Retreat Approved Band 1

Project Name	Project Description
AFG-010-003 AFG Operations	AFG of ground service Directo
AFG-010-002: Earthquake Risk Mitigation	Both H project as post indicat priority
AFG-010-004: Security Measures - Keyless Access	A key c electro the Key will pro building securi also in
AFG-010-005: Gemini North Transportation Efficiency	Establ HBF ar
AFG-010-007: LEED Compliance Feasibility	Using t Leader Existing benefit comple goals. I art stre mater (LEED-existing existing
AFG-010-008: Online forms, digital signatures and Docu-Share	To intr large v in an u to bette storage
AFG-010-009: Committee Archives uploaded to Docu-Share (or similar on-line document storage system)	To faci always that a p ensurin

2010 Retreat Approved Band 1 Projects for the Engineering Group (ENG) (Pa

Project Name	Project Description
ENG10-101: O&M GS Monthly May Shutdown (B. Walls)	Detailed plan to execute the shutdown. Detailed plan of prepara to execute the shutdown.
ENG10-102N: O&M GN in Situ Wash (R Wyman)	Detailed in situ wash plan. Detailed in situ was improvements pl Detailed in situ was preparation plan.
ENG10-102S: O&M GS in Situ Wash (T. Vucina)	Detailed in situ wash plan. Detailed in situ was improvements pl Detailed in situ was preparation plan.
ENG10-103: O&M Eng. Spares Project (S. Hardash)	Current spares inventory list. Spares inventory list update progr Each group spares procurement plan development program.
ENG10-104: O&M Eng. writing procedures (G. Arriagada)	Each group writing procedures plan for the year
ENG10-105: O&M 2010 GS coating facilities preps (B. Walls)	All the preparatory tasks needed to successfully execute GS M1 coating shutdown. It does not include the coating process prepa work.

ISG-10-015: Syslog services	Upgr splur
ISG-10-017: GN Print Server	Depit wast
ISG-10-019: Gemini CyberSecurity Program (Phase 2)	Cont intro
ISG-10-020: Daily Email Digester	Millic with type went autor It is a the s Dige
ISG-10-021: Improved Gemini Search Tool	A Ge (inclu
ISG-10-022: Summit Web Servers for Telops	Depit time

Arriagada	ENG10-109N: O&M GN Management Tasks (S. Hardash)	GN TIO M planning duties Attendance of eng. managers and techs to coordination meetings and safety meetings TTMs shifts time accounting.
	ENG10-109NA: O&M GN Management Tasks (S. Hardash)	In this project is placed the TTMs calendar. Due to the different work schedule this task was treated as separately.
	ENG10-109S: O&M GS Management Tasks (R. Rogers)	This project covers: GS TIO M planning duties Attendance of eng. managers and techs to coordination meetings and safety meetings TTMs shifts time accounting.
	ENG10-109SA: O&M GS Management Tasks (R. Rogers)	In this project is placed the TTMs calendar. Due to the different work schedule this task was treated as separately.
	ENG10-110N: O&M GN Predictive Maint & Routine Ops Tasks (M Calderera)	This project covers: All routine daily telescope and instrument functional checks performed by the day crew. All daily, weekly, monthly, etc. routine plant room, fifth floor checks, dome checks, instruments checks. All routine clerical work. All routine janitorial work. Preparation and operation of laser system.
	ENG10-110S: O&M GS Predictive Maint & Routine Ops Tasks (D Maltes)	This project covers: All routine daily telescope and instrument functional checks performed by the day crew. All daily, weekly, monthly, etc. routine plant room, fourth floor checks, dome checks, instruments checks. All routine clerical work. All routine janitorial work.



Lessons Learned After 3 Years...



Rocks & Buckets...





Important Early Lessons Learned...

✳ After the first 2 major planning retreats the dominant conclusions were -

- ✳ *We barely have enough staff to operate and maintain 2 telescopes*
- ✳ *We have to very carefully decide what new projects we will and will not take on*
- ✳ *Planning is only part of the story - plan execution is the rest*
- ✳ *Better planning software helps the process enormously...*



**Miami Planning Retreat
February 2007**



**Santiago Planning Retreat
October 2007**



Important Early Lessons Learned...

- * *Reporting is integral* to the process of managing activity and everyone needs to take responsibility
- * Should give serious consideration to a *full time Observatory plan coordinator*
 - * Maintain central plan database, organize monthly reports, disseminate information to staff, organize task definition and resource loading going into annual retreats
- * Need *increased accountability* in the execution of our plan...



Important Early Lessons Learned...

- ✳ Projects (committed actions) can only exist if someone -
 - ✳ Takes *ownership*
 - ✳ Has *responsibility* to carry them out by some fixed date
 - ✳ Is *accountable* for their completion via annual performance evaluations



Important Early Lessons Learned...

- ❖ **During the first year of plan execution I did not spend enough time overseeing the plan and interacting with senior managers to ensure its success**
 - ★ *I now hold weekly meetings with each AD to discuss plan execution issues, challenges and problems*
- ❖ **I needed to increase the visibility of our plan definition and execution**
 - ★ *A new Annual Report format was adopted which clearly lists plan objectives and actual completion statistics*
- ❖ **The Directorate, as a group, should identify and build into the planning process various long-range strategic tasks**
 - ★ *This is now done regularly*



Take Away Points

- * Regular planning is essential in any organization, with benefits that far outweigh the costs
- * At Gemini, planning is central to our culture change as we migrate away from a “firefighting construction project” mindset and into operations
- * Even the best laid plans are subject to the vagaries of circumstances beyond our control, nonetheless, we update our plans to accommodate reality – we don’t abandon our principles...



GEMINI OBSERVATORY

Exploring the Universe, Sharing its Wonders