



# Integrated Planning and Performance Management (IPPM)

William Wester

Head, IPPM

SAC Meeting, Dec 14, 2020

Eileen Crowley

Integrated Planning Analyst

# Integrated

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Report to Joe Lykken as Deputy Director for Research

- I participate in Office of Chief Research Officer (OCRO) Meetings

Continue to help support Vanessa Peoples as Chief Financial Officer

- February Budget Briefing
- Field Work Proposals (FWPs)

Engagement with Kate Gregory as Chief Operating Officer

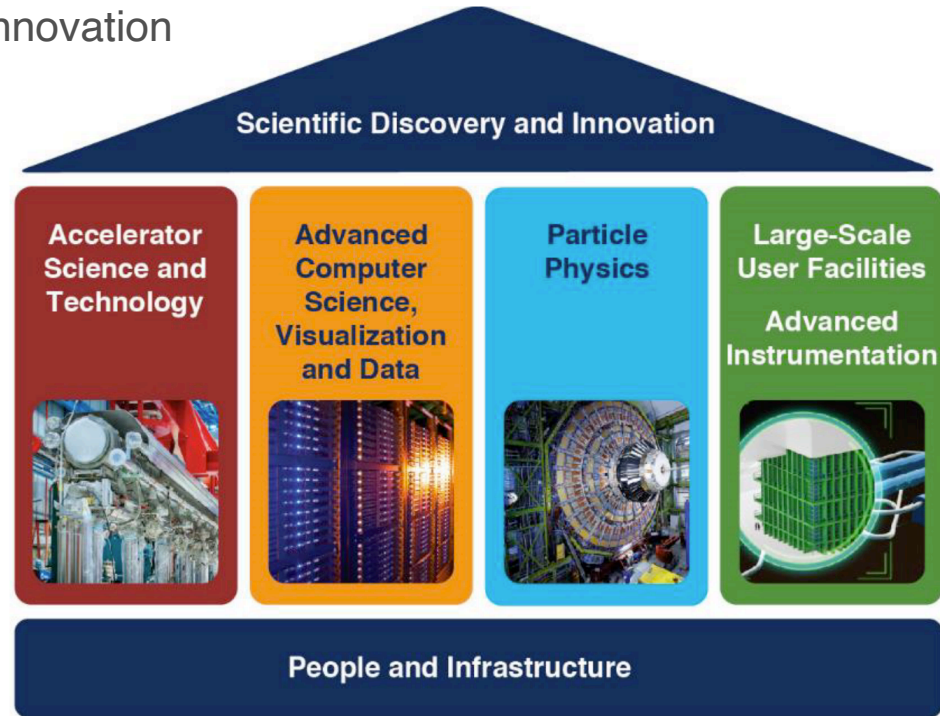
- Infrastructure including facilities and business systems

A key IPPM deliverable is to oversee the [Annual Lab Plan \(ALP\)](#) document and presentation to the DOE Office of Science that incorporates research, finances, and operations

# Planning (Strategic Planning)

- The annual lab plan articulates and updates the laboratory's strategic plan
  - Laboratory mission towards science and innovation in particle physics.
    - Supported by four DOE core capabilities
    - Foundation of people and infrastructure
- Science and Technology Strategy

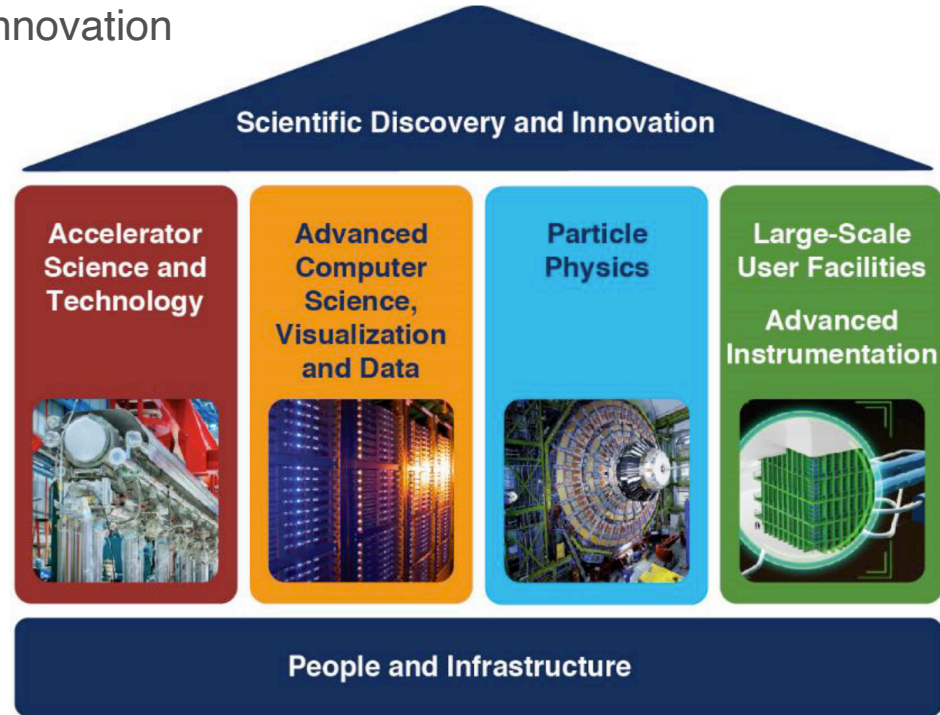
- ➔ Be the International Hub for Neutrino Science
- ➔ Be the Frontier Laboratory for Particle Physics Discovery
- ➔ Be the World Leader in Accelerator Science and Technology
- ➔ Drive Innovation in Particle Detector Technologies
- ➔ Be at the Forefront of Large-scale Data Analytics
- ➔ Become a National Center for Quantum Science and Technology



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# Strategic Planning

- IPPM Organizes an annual [Strategic Planning Workshop](#) (SPW) (Jan 14-15 2021)
  - Engage Strategic Planning Group Leaders (SPGLs) organized by the themes spelled out in the last P5 process and including quantum and infrastructure

Accelerator Science and Technology	J Jarvis M Martinello	Detectors for Science	P Merkel
Artificial Intelligence	N Tran	Infrastructure for Science	T Lundin
Collider Science	S Jindariani Z Gecse	Neutrino Science	A Schukraft M Betancourt M Toups – outgoing
Cosmic Science	L Hsu	Precision Science	K Badgley B Kiburg
Computing for Science	A Norman Mike Kirby	Quantum Science and Techology	A Grassellino (SQMS)

Update Laboratory Goals and Objectives  
Presentation and slides at SPW  
Assist in Annual Lab Plan preparations

*PAC encouragement for close ties between SAC and SPGLs (this presentation). Recognition that right now SAC has involvement with Snowmass preparations.*

# Workforce planning

- Continual improvements in strategic workforce planning
- Several efforts from the lab modernization exercise of a few years ago to a lab-wide demand analysis with 100s of filled out spreadsheets listing the needs by lab activity as a function of job category.
- New this year is an Oracle-based tool that integrates the workforce from WDRS, project needs from P6, and the IPPM maintained lab activity/capability database



# Performance Management

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- Active roles in
  - Projects through the Performance Oversight Group (POG) meetings
  - Facilitate response to Performance Evaluation and Measurement Plan (PEMP)
    - In particular the science and technology goals
  - Enterprise Risk Management Board
    - Fermilab Risk Manager: Lucas Taylor (project office, based at CERN)
    - Monthly meetings to evaluate and identify enterprise-level risks, mitigations, and responses
- Participation in a variety of laboratory management activities
  - Campus and Facility Planning Board and Information Systems Portfolio Management Team
  - Human Performance Improvement subcommittee of the Fermilab ES&H Committee
  - Science and Technology Risk Matrix
  - Assurance Council
  - Other assignments