Lessons_Learned-FY2012-Scientist_Survey.doc
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We may want to include Research Associates since they are a major fraction of Fermilab participants in Experiments, especially those with large fractions of FTE devoted to a single activity.

Why should one include Applications Physicists? They have no independent research fraction and are fully assigned by their supervisor.

Need to better define "Laboratory Management". It is not project management (that should be included under that project). But does it include supervising a technical group? (Maybe that should be included under some phase of operations.) I interpret serving on a special committee or taskforce assigned by Director or Deputy Director (e.g. Employee Advisory Group) as Laboratory Management. What about serving on a Director's Review? Should that be Lab Management or assigned to task being reviewed (e.g. NOvA or DECam)? What about presenting at other reviews? Is Bob Kephart doing Lab Management or SRF when he presents at DOE Budget Review?

Do we need a category for Education/Communication/Public Outreach? Is this a large fraction? How would we know? Do we want/need to know? This also applies to OHAP survey and setting up appropriate budget codes for FTL charges.

Need some better treatment of "Other" category, either a place on the survey form for a short description, or requirement that an e-mail be sent to Survey coordinator explaining (in either case, this should be an automatic form generated by the survey).

Need to emphasize that people joining midway through prior year, on part-time (e.g. phased retirement), or expecting to depart (e.g. retire mid-way through a year), should put down a sum which represents that fraction < 100%.

Do we really want to enforce that scientists check with supervisors or Division Heads or Department Heads before filling-out the survey? There was some sentiment that if this is so, then the Supervisors/Division Heads/Department Heads should fill out survey for all scientists under them (lot of work for those people).

How does this interact with "research fraction" and "academic freedom" to choose a particular research area, rather than being assigned to "research" in a given area?
(It IS necessary that the Supervisor/Division Head/Department Head understand how much time will be devoted to "service work" and for what particular activities.)

How can this whole process be made more useful to upper management: Director, Deputy Director, Associate Directors, Division Heads, B&R owners, and Project Managers, and how

can/will they use the information gathered? Let's evolve the Scientist Survey to better meet their needs.

Some logistics:

We have the .CSV file from survey. This needed 8 additional files for corrections to this survey and to combine information (and corrections) from other surveys. I added an identification number for these files in Col A.

Where do we store all of these files?

How do we add FY2013 survey? Do we simply replace FY2012 projected from FY2012 survey with the FY2012 actual from FY2013 survey? Easy enuf, simply cut away all FY2012 and future projections from Compiled 3 Surveys and replace with FY2013.

Do we want to compare the following?

FY2011 projected from FY2011 survey with FY2011 actual from FY2012 survey?

Do we compare with FY2011 actuals from FTL data?

Note FY2011 survey was taken in the 5th month of FY, so not much projection

FY2010 projected from FY2010 survey with FY2010 actual from FY2011 survey?

What are metrics? Easy to see Projected CDF vs Actual CDF, but that is pretty easy, maybe enuf

Other correlations person-by-person may be much more difficult to derive & interpret