



## **Quilt Peer Reviews Recommendation Summary September 2014**

### **Background**

In the fall of 2008, The Quilt completed its first peer review for a member organization. The successful outcome has led to additional member requests for the service. Our formal peer reviews rely on member volunteers and is a time-intensive effort by peer reviewers, Quilt staff and the requesting organization. Our organizational capacity allows us to support 1-2 reviews per year. In an effort to support more members in a timely manner with this type of organizational benchmarking service, a team of Quilt member representatives developed a stand-alone tool as a self-assessment resource as either the first step in the peer review process or as a stand-alone tool to guide an organization's development.

The self-assessment tool covers a number of elements and practices that The Quilt development team believed were important in developing an organization that is innovative, engaged, and operationally sound. The self-assessment tool is available to members by request.

With several formal peer reviews complete, The Quilt compiled a set of general learnings from these efforts in order to share the outcomes of these peer review efforts with our membership. Through this compilation, we found that the recommendations from the peer reviews to date closely align with the elements and practices found in the self-assessment tool.

### **Peer Review Summary**

The six peer reviews completed thus far have been conducted by a review team consisting of Quilt staff and 3-4 reviewers from The Quilt community. The reviewers are volunteers in the sense that they are not paid. While individuals from Quilt member organizations may have participated on more than one review team, the exact makeup of the review teams was never duplicated.

Even with the diversity represented by the organizations reviewed and a different team of reviewers for each, the insights and recommendations provided by the peer review teams have been remarkably consistent over time speaking to the experience, knowledge and business acumen of our community members.

The following summary of peer review recommendations have been generalized to share with the Quilt community. They are presented in order of the frequency they appeared in the reviews.

## **I. Strategic Planning**

- a. The importance of strategic planning was underscored in the peer reviews in creating well-managed and thriving organizations. Strategic planning lays the foundation for hiring successful executive leadership, defining a mission & vision, determining staffing levels, determining service offerings, establishing the role of Board, developing operational processes and procedures and developing communication models.
- b. Mission and vision statements are the compass for an organization's growth, governance, services, and support. These ought to be reviewed on a regular basis to ensure they continue to reflect the purpose and values of the organization.
- c. The planning process should involve those individuals who are champions and stakeholders of the organization. The process to develop the plan is of equal importance to the plan itself in gaining buying-in from the communities our member organizations serve.

## **II. Governance**

- a. A desirable governing body is one that is representative of the groups/communities served by the organization.
- b. If the governance structure of the organization does not warrant or support a Board of Directors, the creation of an advisory council(s) is important to building community and user support and participation.
- c. The Board of Directors or other governing body has defined roles that are codified within the organization.
- d. If the governing body is representative of different member communities, it is important that the R&E networking organization facilitate the sharing of landscapes and user requirements across the institution types so that the governing body understands the breadth of the community needs and perspectives and is better able to effectively fulfill its responsibility to the entire organization

## **III. Finance**

- a. Create a network equipment refresh plan that lists all equipment, date of deployment, manufacturers' specs for useful life related to effective life of equipment, etc... The plan should have a 5-7 year planning horizon so that the organization can effectively communicate the budget requirements for capital refresh to its stakeholders.
- b. Establish appropriate and effective business metrics to determine long-term viability of services and to identify trends and shifts
- c. Be proactive in developing relationships and collaborative opportunities with users, industry partners, state agencies, etc... to leverage each other's assets and provider a broader set of network solutions for user communities in a cost-effective manner.
- d. Even if members do not have to pay for services because the funding is provided by some other organization or funding mechanism, they should receive an itemized invoice with the cost of each service with the reduced price listed on the invoice. This will serve as an information piece to show the true cost of the service they

receive and it will also prepare members should the organization begin fee-for-services or the member's funding is no longer available.

- e. For those with annual member service contracts, seek to reduce financial risk by matching the length of last mile circuit contract with third party provider to the length of the participants' contracts.
- f. Phase in new cost recovery models over a 1-2 yr period so that participants can prepare for pricing changes in their individual budgets.
- g. Where mission supports it, diversity the types and number of communities served in order to promote long-term financial viability.

#### **IV. Service Offerings**

- a. Allocate operational costs (including staff) to each service to better understand true cost of service. Then analyze the services and determine the resource-intensive services that still add value to members and those that don't.
- b. Develop/provide a process for developing new services that is lean & agile.
- c. To effectively rollout new member services, there needs to be dedicated and trained staff to support the service. This new staff capacity requirements should be built into the service budgets.
- d. Invest resources in developing a service catalog that provides full descriptions, features, benefits, pricing, etc...
- e. New services should be based on mission & vision. Identify & prioritize services that have interest across vertical markets. As constituent base grows, the request for new services from specific segments could be extensive and trying to serve and support each of these segments could impact existing members.

#### **V. Operations and Management**

- a. Select organizational key performance metrics that are appropriate to the mission of the organization and its stakeholders. Document and communicate who will receive the metric reports and when.
- b. Staffing levels must be aligned to and consistent with the strategic plan. Regular evaluation of organization capacity is important.
- c. As networks become mission critical for research, education, healthcare, etc., and use expands, a fully staffed 24 x 7 x 365 NOC is key for strategic growth.
- d. The staff responsible for NOC should report directly to the organization that runs the network to maximize network planning, responsibilities and communications.
- e. Especially important to smaller staffed organizations, document operational procedures and policies to assist in training and transition in the event that key staff members leave or move to other positions.

#### **VI. Communications & Outreach**

- a. Communication tools, practices, and audiences should all be documented.
- b. Incorporate a forum that provides regular updates on regional politics and initiatives that may impact the community.
- c. Using communications tools, foster relationships with stakeholders that will/can advocate for your organization. Communicate key messages about the organization on a regular basis so they are familiar and comfortable carrying these messages.

- d. Highlight the unique aspects of the R&E organizations and networks and document these differences in a clear and concise manner. Use testimonials from stakeholders to discuss value of the organization.
- e. Create/establish a business development committee that can focus on marketing the organization's capabilities.
- f. Outreach to Legislative Bodies
  - i. Build relationships within the legislative body and develop new champions for the organization.
  - ii. Invest in a legislative resource that can be the 'eyes and ears' for the organization while the Legislature is in session.
  - iii. When the Legislature is not in session, conduct 'town hall' events and invite the legislative representative to attend so that they can see and hear first hand the value of the organization.
- g. Look for opportunities to partner with commercial telecom providers to demonstrate openness and willingness to work with the private sector.

## **VII. Organizational Culture**

- a. Take time to understand, appreciate and document the positive aspects of the organization's culture and turn these into formal practices. Understanding the culture of the organization will prove useful during a leadership transition and executive leader search.