

# Resource Planning Meeting (RPM)

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(An action item from a Planning and  
Coordination Meeting)

# Resource Planning Meeting

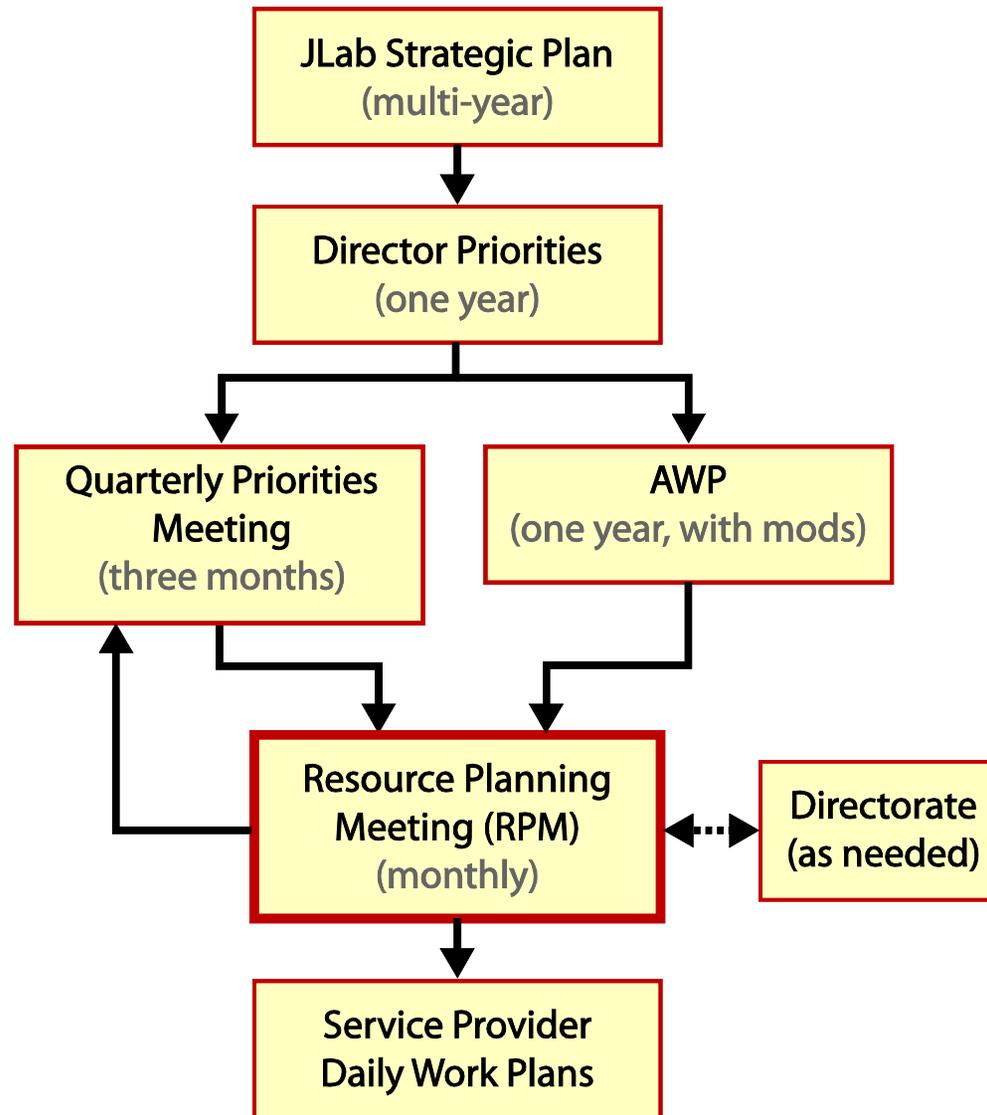
- Short term conflicts occur between programs (often resource limitations).  
Where are they reconciled?
  - Examples:
    - SL21 move to FEL and follow-on recommissioning
    - Qweak beam line installation during the winter SAD

# Resource Planning Meeting

- Would provide a bridge between long-term planning and actual (immediate) work performed by service providers.
  - Current long-term planning activities:
    - Jlab strategic plan (multi-year)
    - Director's priorities list (yearly)
    - AWP (yearly with updates)
    - Quarterly "Planning and Coordination Meetings"
  - Short term planning activities:
    - Accelerator SAD planning
    - Various Hall planning meetings (G2P, Qweak)
    - FEL daily meetings .....

Not  
Consolidated

# Resource Planning Meeting



# Resource Planning Meeting

- **The intent is to:**
  - Present service provider work projections
  - Compare them with customer expectations
  - Identify potential conflicts
  - Provide a forum for discussion and common understanding
  - Resolve conflicts in the context of the overall lab work plan
  - Elevate unresolved issues to the directorate as needed.
- **Frequency:** Monthly or as needed

# Resource Planning Meeting

- Agenda:
  - Overview- Global schedule & other pertinent info- 10 mins (Meeting lead)
  - Service Provider Presentations – Template – 5 mins each
  - Last Call for Concerns/Work Plan Changes – 5 mins (customers)
- Roles:
  - Meeting sponsor – Mike Dallas – provides connection to directorate (attendance not required)
  - Meeting Leader – Will Oren – “emcees” meeting, identify/resolve conflicts, elevates issues when necessary, reports to ¼ly Planning & Coordination Meeting.
  - Scribe – Lyn Wells – records “red flag” issues, insures resolution or ownership before adjournment, archives notes.

# Resource Planning Meeting

- Roles (cont):
  - Presenters: - see list – present project status & identify issues using template :
    - Accelerator
      - Injector (Grames)
      - Operations (Freyberger)
      - SRF (Rimmer)
      - CASA (Krafft)
    - Engineering
      - Alignment (Curtis)
      - Cryogenics (Arenius)
      - EES (Merz)
      - Installation/Vacuum (Oren/Wilson)
      - ME (Wiseman)
    - ESH&Q (Smith)
    - Facilities Management (Future)

# Resource Planning Meeting

- Other Attendees (Customers):
  - 12 GeV (Doty, Harwood, Napier, Yasky, Young)
  - Accelerator (Pilat, Bickley, Michaud, Suhring)
  - BIA (Funk)
  - Engineering (Lauze, Michalski)
  - FEL (Williams)
  - Facilities Management (Sperlazza)
  - Physics (Hall Leaders, Skopik)
  - Other project managers (as invited)
- **Total Attendees: ~31**

# Resource Planning Meeting

- Meeting minutes:
  - Action items from whiteboard with resolutions noted,
  - Service provider presentations (provided electronically before the meeting similar to the Lab Leadership Meeting)
- Go To Example Template (Alignment and Metrology)
- Folding in Fulvia's effort