
RHR-OKRs

Release 0.1

Gagan Kumar

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Check out the [Introduction](#) section to understand how OKRs are reported in the Office of CTO, including the [Roles & responsibilities](#) in the Red Hat Research Team. If you are a KR Owner, check out [OKRs as Goals in Asana](#).

OKRs of the Red Hat Research team is managed in [Asana](#)

If you need assistance in grading a KR, visit the [Grading a KR](#) section.

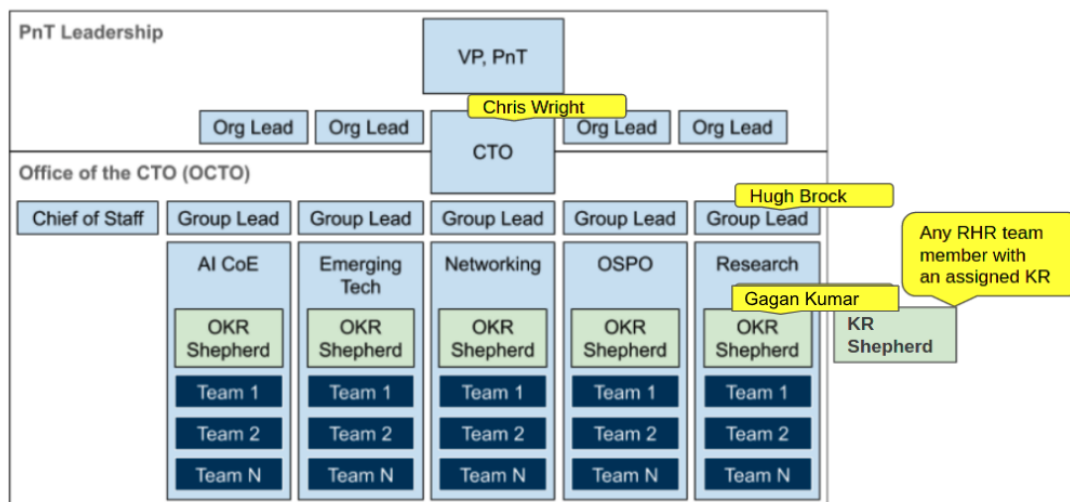
Note: This document is under active development.

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1.1 Introduction

1.1.1 Roles & responsibilities

The diagram below shows the roles associated with OKRs within the OCTO with the names of the people assigned to them. These roles are explained in the [OKR Practice](#) in the CTO Office. In this document, only the roles of OKR Shepherd and KR Shepherd also known as KR Owner will be explained in detail.



1.1.2 OKR Shepherd

Within each OCTO Group, there will be one or more OKR Shepherds that are tasked with keeping OKR records up to date and working with their OCTO Group Lead and KR Shepherds to help set OKRs for the group and for the individual teams.

1.1.3 KR Shepherd/KR Owner

Within the Red Hat Research Program Group, there will be one or more KR Shepherds also known as KR Owners who are tasked with keeping KR records they own up to date and working with their OCTO Group Lead and their OKR Shepherd to help set OKRs for the group. As defined in the [Research Team OKRs presentation](#) “KR Shepherds own nagging and reporting, are not team leads and meet as a group to groom KRs.”

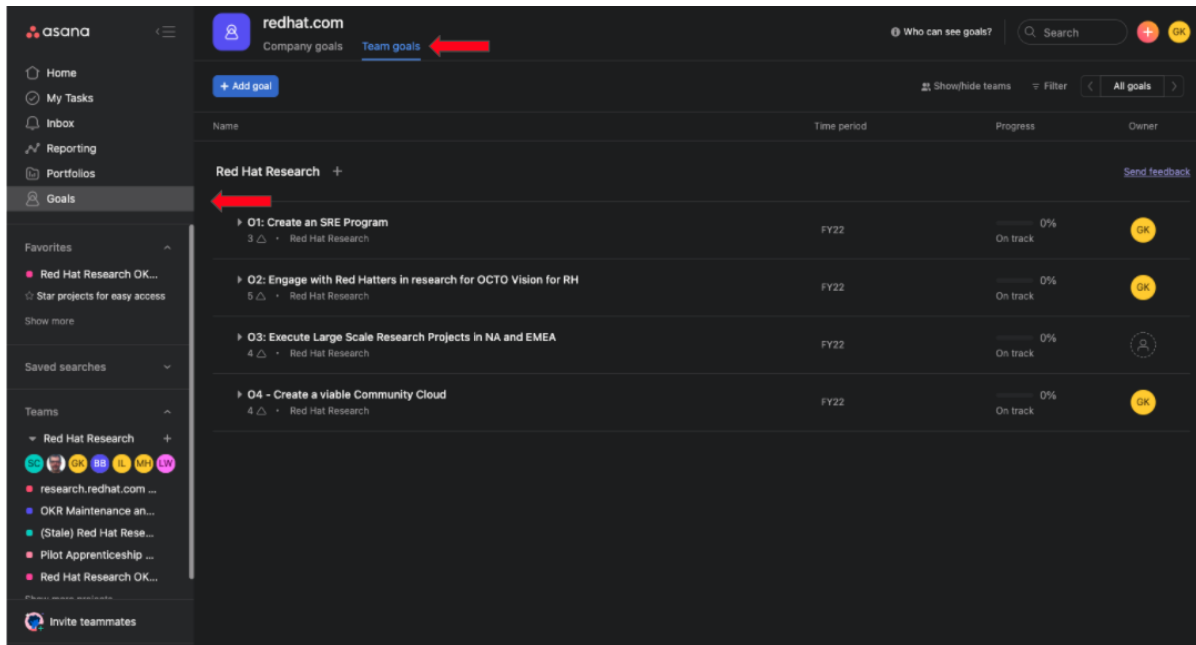
- RACI analysis:
 1. The KR Shepherd is responsible for ensuring that their specific KRs are completed/met by taking the following actions:
 - Meeting with their OCTO Group Lead quarterly to review old group-level OKRs and support the creation of new ones.
 - Meeting with their OCTO Group Lead, OKR Shepherd, and team to groom KRs and ensure that expectations are clear.
 - Enroll contributors to help them implement their KRs. KR contributors may or may not belong to the RHR Group.
 - Meeting / following up with their KR Contributors at least on a weekly basis to track and report progress.
 - Raising the alarm if their KRs are at risk and look for ways to mitigate the risks.
 2. The KR Shepherd is responsible for determining how their KR's will be graded. They need to convey their grading system to the OKR Shepherd.
 3. The KR Shepherd is accountable for the availability of relatively current KR data for their OCTO Group in the [RHR Asana Goals](#).
 4. The KR Shepherd is informed by the OCTO Group Lead when out-of-cycle changes are made to top-level OKRs or group-level OKRs.
 5. The KR Shepherd will meet with the OKR Shepherd, at least on a monthly basis, to grade its KRs in preparation for the quarterly review of the group-level OKRs.

1.2 Prerequisite

1.2.1 OKRs as Goals in Asana

The Research team will be tracking the team's Objective and Key Results as Goals in the Asana application. The OKRS were derived from RHR's [3-year vision document](#). Follow the below steps to view the Red Hat Research team's OKRs in Asana:

1. If you don't have an account in Asana, [create an account](#) using your Red Hat e-mail address.
2. After signing up, use [this link](#) to get access Red Hat Research Team's Goals.
3. After joining the Research team, click on the Goals option.



If you are unable to see any goals, select the 'Red Hat Research' team option from the show/hide teams option.

1.3 OKR Grading

1.3.1 Grading a KR

Because the Red Hat Research team engages in a wide variety of tasks, it is difficult to set one kind of metric for KRs. However, we have come up with a template that should be used as the baseline while creating targets for your KRs. Well before deciding on grading the KR, map your KR to one of the following types of Key Results based on characteristics and then use the respective grading metrics that are suggested for that type of Key Result.

1.3.2 Incremental Key Results

If a Key Result is a task to substantially increase a number gradually over a period of time, then we can call that an Incremental Key Result.

Thumb Rule to qualify: N to $2N$ (Where $N > 100$).

Examples of Incremental Key Results: By the end of CY22Q1, double the number of RHR website hits from 3000 unique visitors/month to 6000 unique visitors/month.

Quantify and Grade Incremental Key Results: Break the difference between the target and the baseline into equal portions $((6000 - 3000) / 3 \text{ months} = 1000 \text{ visitors/month})$ across the Quarter and set those portions as targets for checkpoints.

| Check Point | Target | Grading |
|-----------------|---------------------|---------|
| CY22 Jan(Start) | 3000 visitors/month | 0% |
| CY22 Jan(end) | 4000 visitors/month | 33% |
| CY22 Feb(end) | 5000 visitors/month | 66% |
| CY22 Mar(end) | 6000 visitors/month | 100% |

1.3.3 Groundwork Key Results

If a Key Result requires a significant amount of time to be spent on groundwork even before getting early tangible results, then we can call that KR a Groundwork Key Result. These tasks involve actions to build the foundation for increasing a metric, which will then rise sharply near the end of the measuring period.

Thumb Rule to qualify: N to 10N (Where $N > 1$ and $N < 100$).

Examples of Groundwork Key Results: By the end of CY22Q1, multiply by 10 the number of Red Hatters participating in Research projects for a total of 50.

Quantify and Grade Incremental Key Results: Identify the steps that need to be made to increase the number. Spend 2/3rd of the time working on these steps. In the last part of the trimester, work on increasing the number.

| Check Point | Target | Grading |
|-----------------|--|---------|
| CY22 Jan(Start) | 5 Engaged; No additional engagement | 0% |
| CY22 Jan(end) | 5 Engaged; Identified additional engagement | 33% |
| CY22 Feb(end) | 5 Engaged; Commitment and planned engagement | 66% |
| CY22 Mar(end) | 50 Engaged; Onboarding complete | 100% |

1.3.4 Binary Key Results

If the completion status of a Key Result can only be quantified as a yes or a no, then we can call that a Binary Key Result. These Key Results are tasks to initiate a project or an initiative that didn't exist before.

Thumb Rule to qualify: 0 or 1

Examples of Judgemental Key Results: By the end of CY22Q1, a production environment of ESI should be running in the Mass Open Cloud.

Quantify and Grade Judgemental Key Results: Identify the steps required to initiate the Key Result. Spend the first third of the period planning and identifying the ways to achieve the key results. Reserve the second third for executing the plan. In the last third, test the system for load and longevity.

| Check Point | Target | Grading |
|-----------------|--|---------|
| CY22 Jan(Start) | No plans for ESI Production Deployment | 0% |
| CY22 Jan(end) | H/W identified; S/W req. are planned. | 33% |
| CY22 Feb(end) | H/W configured; S/W developed and deployed | 66% |
| CY22 Mar(end) | The system sustained 50 operations | 100% |

1.4 OKR Tracking

If you are an owner of a Key Result, follow the below steps to keep track of the progress. For the purpose of example, we will walk you through the entire tracking process with an example Key Result.

Example Key Result

04-KR2: Production Elastic Secure Infrastructure

By January 2022, a “production” deployment of Elastic Secure Infrastructure is in place at the MGHPCC and is receiving feedback from IT admin users at Harvard IT, BU IT, and the MOC who are actively involved in ESI evaluations.

1.4.1 Step 1: Update the KR in Asana

- Before the Quarterly Kickoff meeting, append **ACTIVE** to the KR heading in Goals.
04-KR2 ACTIVE: Production Elastic Secure Infrastructure
- You will be assigned as the Owner for the goal by the OKR Shepherd. If not, then assign yourself as the Goal Owner.
- Crosscheck the due date by looking at the *Time Period* value.
Example: Q4FY21 or Q1FY22
- It is highly encouraged to add collaborators to the Key Result. Identify the people who will be working with you to deliver the Key Result and tag them using the *Collaborators* option.
- Make sure the Key result is mapped to the correct Objective by checking the *Parent Goal*.

1.4.2 Step 2: Set KR grading metrics

- Based on the guidelines given in the [Grading a KR](#) section, identify to which category you can map your Key Result.
04-KR2 can be classified as a Binary Key result
- Once you have identified the category, set 3 sub-goals (1 for each checkpoint) and assign metrics for the sub-goals in Asana under your Key Result.
Sub-goal 1: Identify Hardware for the deployment (Due Oct '21)
Sub-goal 2: Develop multi-tenancy and check network configuration (Due Nov '21)
Sub-goal 3: Onboard at least 3 individuals and at least 500 leasing operations should be completed(Due Dec '21)
- Set the status of the Key Result to *On Track*
- Before every checkpoint meeting, update the percentage of completion of the sub-goals.

1.4.3 Step 3: Setup an Asana Project

- We can't track all the dependencies and the process through Goals. For this purpose, the KR Owners along with the OKR Shepherd are expected to create Asana Projects for each KR.
- The project name will be just the Objective number followed by the KR number.

Example: 04-KR2

- The owners are expected to list major issues that are critical for KR success. They can tag the collaborators for any tasks created in the project.

1.4.4 Step 4: Link the Project and the Goal

- Once a project has been created in Asana, the KR Owner should link that project to the Key Result in the Goals. They can do that by clicking on the **Supporting Work** option.

1.4.5 Step 5: Create GitHub Project if required

- If a GitHub project exists to achieve a part of Key Result or the entire Key Result, the can be linked using the **Add Links & Files** option on the Project's Overview page.

1.5 Schedule

1.5.1 FY21Q4

| Date | Event | Owners |
|----------------------|-------------------------------|---------------------------------|
| Oct 11 - Oct 14 2021 | FY21Q4 RHR OKR Kickoff | OKR Shepherd & FY21Q4 KR Owners |
| | | |
| Oct 15 2021 | FY21Q3 KR's Report submission | Group Lead & OKR Shepherd |
| Oct 18 - Oct 20 2021 | FY21Q3 KR's Readouts | OCTO Staff & Group Lead |
| | | |
| Nov 8 - Nov 9 2021 | FY21Q4 KR's First Checkpoint | OKR Shepherd & FY21Q4 KR Owners |
| Dec 6 - Dec 7 2021 | FY21Q4 KR's Second Checkpoint | OKR Shepherd & FY21Q4 KR Owners |
| Jan 10 - Jan 11 2022 | FY21Q4 KR's Final Grading | OKR Shepherd & FY21Q4 KR Owners |

1.5.2 FY22Q1

| Date | Event | Owners |
|----------------------|-------------------------------|---------------------------------|
| Jan 12 - Jan 13 2022 | FY22Q1 RHR OKR Kickoff | OKR Shepherd & FY22Q1 KR Owners |
| | | |
| Jan 14 2022 | FY21Q4 KR's Report submission | Group Lead & OKR Shepherd |
| Jan 17 - Jan 19 2022 | FY21Q4 KR's Readouts | OCTO Staff & Group Lead |
| | | |
| Feb 7 - Feb 8 2022 | FY22Q1 KR's First Checkpoint | OKR Shepherd & FY22Q1 KR Owners |
| Mar 7 - Mar 8 2022 | FY22Q1 KR's Second Checkpoint | OKR Shepherd & FY22Q1 KR Owners |
| Apr 11 - Apr 12 2022 | FY22Q1 KR's Final Grading | OKR Shepherd & FY22Q1 KR Owners |

1.6 Resources

1. Red Hat Research 3-Year vision (2021-2024)
2. OKRs @ OCTO
3. Why do we need OKRs in the Research team?
4. Research Team in Asana

1.7 FAQs

1. I am not part of the Red Hat Research Asana team. How can I get access to it?
Use this [link](#) to join the Red Hat Research team. Asana team admins will approve your request.
2. Whom should I contact if I have any concerns in terms of Key Results or Asana?
You can email Hugh Brock or Gagan Kumar if you need any help in grading your Key Result.
3. How to add information or ask for a correction in this document?
You can raise an issue in this [GitHub project](#).
4. Who is responsible for setting up grading and checkpoint meetings?
OKR Shepherd is responsible arrange these meetings.