

Martha Dexter



STAFF MEMO

December 14, 1979

TO: Program Managers

FROM: Fred Wood *FWD*

RE: Notes and Comments on Staff Discussion of Task Force on
TA Methodology and Management

The discussion at last Friday's staff seminar was very useful in clarifying the role of the Task Force. I thought it might be worthwhile to distribute my summary notes and comments on that meeting, both for general information purposes and to assist you in recommending a representative from your Program to serve on the Task Force, if you have not already done so. I would be happy to discuss further if you wish. Just give me a call.

Question: Do we know enough about TA at this point for a Task Force to identify what works and what doesn't work?

Response: The Task Force is not expected to come up with the way to do TA or to provide the definitive word on all aspects of TA at OTA. The Task Force is intended to represent a very practical approach for building on what has been learned here at OTA over the last five years, and I believe that to be substantial. But the Task Force certainly may also identify elements of TA about which we have less experience and know relatively little.

The Task Force may wish in some way to survey or draw on the experience of TA practitioners and users in NSF and other government agencies, the private sector, and perhaps overseas. However, the primary purpose of such outreach would be to learn what we can from the experience of others so that we can do our own job even better.

Question: Will the Task Force amount to a research study on analytical techniques for TA, or will the focus be more on management practices for conducting TA?

Response: The Task Force is intended to focus more on the process of TA as practiced by OTA, which is really a mix of TA methods and management practices, rather than on in-depth study of specific analytical techniques. The Task Force will probably address in some general way the range of analytical techniques available for use in a study, but will have to decide in January to what extent an in-depth treatment of specific techniques is desirable and feasible during FY 80. The Task Force may wish to form one or more working groups to focus on various types of TA methods such as social impact analysis, scenario-building, and computer-based modeling.

Question: Will the apparently ambitious Task Force effort cost too much in time and effort?

Response: Clearly, the Task Force cannot be expected to do everything. One of the agenda items at the first Task Force meetings in January will be to define what can realistically be accomplished in FY 80. The Task Force and the biweekly staff meetings are intended to begin a continuous process of staff development and institutional learning which will hopefully pay off many times over in the long run.

Question: What will be the products of the Task Force effort?

Response: The Task Force members will to a large extent address this question in January. A written handbook or looseleaf notebook for staff use and perhaps some recommendations for institutional improvement are two kinds of tangible and useful products which might result.

Question: Will the effort be limited primarily to those serving on the Task Force?

Response: No. While it is important to have representation from every program and to keep the Task Force to a manageable size, the Task Force will be open to input from all interested staff. This will be a participative process. For example, we may wish to involve other staff as resource persons in particular areas, and I would expect to use a variety of approaches to get the full benefit of staff expertise. This will also help spread the effort over a number of people so as to keep the level of commitment within reason for all.

Both Jack Gibbons and Dan De Simone will serve as active ex-officio members of the Task Force. The Assistant Directors will review and comment on the work of the Task Force.

Question: How will the Task Force relate to other efforts to improve aspects of OTA operations?

Response: The Task Force will serve as a mechanism for looking comprehensively at all stages of the assessment process and for pulling together many of the separate efforts to improve specific elements of TA at OTA.

Included among these would be Nancy Naismith's presentation last Friday on advisory panels, the Director's seminar last August on public involvement, Liz Emanuel's study of word processing systems, Bob Friedman's and Harold Sharlin's workshops on, respectively, ecological

and social impact analysis, Martha Dexter's seminars on using the library and information resources, Tom McGurn's upcoming presentation on cost estimation, and John Burn's and John Holmes' planned discussion of the report publication process.

We also want to build on earlier efforts along these lines, such as Audrey Buyrn's presentation last spring on project leading, Gretchen Kolsrud's seminars on TA methodology, Bob Daly's draft report on the OTA process, and Marvin Ott's memo last May on improving internal communication at OTA.

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