Meeting Summary

Meeting Subject: Lessons Learned from prior Quadrennial Review experience
Date of Meeting: March 4, 2011

Attendees

Booz Allen Hamilton, Inc.
Mark Gerencser, Executive Vice President
Joan Dempsey, Senior Vice President
Gary Rahl, Senior Vice President

Department of Energy
Dr. Steven Koonin, Under Secretary (Science)
Michael Holland
Dr. Asa Hopkins

Description

Booz Allen provided a summary overview of our experience in Quadrennial Review (QR) processes for several federal agencies: the Department of Defense (QDR), the Intelligence Community (QICR), the Department of Homeland Security (QHSR), and the Department of State (QDDR).

- Each agency, and each vintage of QR, followed a more-or-less common process, but also differed considerably in focus and outcome based on leadership objectives for the review
- Failure to have or clearly communicate a leadership objective generally limited the usefulness of the review and its ultimate success

Under Secretary Koonin gave a description of Doe's Quadrennial Technology Review (QTR), consistent with what has been made publicly available for comment in the QTR Framing Document.

- Booz Allen shared our experience that leaders need to determine whether they are pursuing an a QR more as an analytic exercise (perhaps to influence near-term budgets) or change management process; the QRs that are best institutionalized have focused on change management
- We suggested that DOE consider a parallel effort to identify all of its research and technology investments (by organization and technology readiness level) in the six categories described by the QTR, forming the kind of baseline we created for DOE in the area of energy storage

Booz Allen described our experience in the QICR in greater depth, as the Intelligence Community had parallels with the current DOE environment. The QICR used several techniques to capture diverse points of view, and drive organizational change. Along these lines, we described our thought leadership in the area of optimizing strategies in a diverse stakeholder environment, specifically talking about some of the examples in the *Megacommunities*, of which Mark Gerencser is a co-author. Available at: http://www.the-american-interest.com/article.cfm?piece=926

We used no Powerpoint presentation, and provided one document to the DOE attendees: a reprint of an article, *Re-imagining infrastructure*, authored by Mark Gerencser for the March/April 2011 edition of The American Interest magazine. Re-print is attached.