



Long Term Ecological Network Network Office Strategic Planning for LTER Network Cooperative Agreement Tasking

The SRR and the NSF commentaries on the report request that NET engage in a strategic planning process in close consultation with the LTER Executive and Coordinating Committees. Strategic planning will thus be a high priority activity for NET staff during the first 18 months of the new Cooperative Agreement. Specific Tasks [not verbatim]:

- Develop a strategic plan focusing on the NET's mission, its role in relation to other organizations, and the most effective structure for managing NET and its relations with external entities. The plan will include:
 1. Mission statement, management organization chart, and defined scope of external relations *(Vision statement will be the same as that suggested by National Advisory Board, until otherwise decided by Coordinating Committee for the network - The mission statement will be tied to the major required items in the Cooperative Agreement and other strategic objectives of the Network office. A preliminary organizational structure diagram showing the relationship of the NET to other entities in the LTER Network has been created, along with a detailed organizational structure chart for the existing NET Office. We are examining different organizational methodologies that can be examined when we have a good handle on the strategic objectives, priorities and goals of the Network.*
 2. Mechanisms for personnel evaluation *The Staff evaluation is standard UNM form - Bob will provide copy for final document. Research Faculty evaluation is in draft form - to be provided by Bob. Another suggestion is to create a Matrix of required actions by staff/faculty position from the December 20th SOW and also use as a check and balance against requirements as well as an individual evaluation tool.*
 3. Reporting structures and mechanisms of accountability *These will be created and tied to the organizational charts identified in item 1.*
 4. Relations to NSF, UNM, and LTER leadership *These are being refined using the charts created in Item 1.*
 5. Processes for program evaluation, priority setting, and priority implementation *This is a long term effort that can become very labor intensive. Previous reviews have identified this as an area that needs attention. Part of the*

program evaluation piece will be developed by ITP [site evaluation of NET]. Priority setting and implementation has already started with the methodology used in the December 20th SOW - indicating supported and non-supported activities. This is a first level process for resource planning, a component of project management. It does not seem that a formal project management process is the right process, however, to allocate resources for the LTER NET, but some abbreviated form may be appropriate.

6. *Defined role in LTER-wide initiatives For Items 6 and 7 the efforts associated with synthesis and the development of consistent IT standards across the network are examples.. Many of these kinds of efforts will have to be proposed by the Coordinating Committee, or Network sites to NSF, because there is only sufficient staff and budget to accomplish the SOW defined in the December 20th document. The overall strategic plan will address how the NET Office should engage in Network-wide activities.*
 7. *Defined role in LTER-related research See Item 6 above.*
 8. *Assessment of the most effective structures and activities for independent advisory groups This effort is intertwined with the objectives of the Coordinating Committee in the development of By-Laws, and the movement toward a more formal organizational structure for the Network. This includes a more formal role for the NAB. We will also look at other Institutes within UNM, and other major organizations with similar missions.*
- *Engage independent consulting firm to facilitate the strategic planning activity (Done - ITP)*
 - *Incorporate into NET strategic plan, five year plans and budgets for*
 1. *Further development of the information infrastructure and informatics capabilities of the LTER Network James Brunt will develop this piece in conjunction with the IT Committee.*
 2. *Creation of high-level leadership and facilitation of future Network synthesis activities These will be included in subsequent budget requests, and will be identified at actions under a key strategy in the NET plan.*
 - *Implement a new relationship between UNM and the Network Office as an Institute under the Dean of Arts and Sciences. Examine optimum types of faculty appointments for NET associate directors. A July meeting with Dean Dasenbrock and Dr. Yates is planned to discuss this. Other structures within the University will also be examined. This effort should be accomplished with some deliberation and coordinated with the Executive Committee since it interrelated*

with what the future state of the Network should be (for example, is it possible that the Network would move toward an independent non-profit organization).

- Design a complete evaluation by the LTER community of the activities of the NET (*Part of ITP tasking*).
- Coordinate the results of evaluations of the ILTER program and the LTER educational activities into strategic plan. *This is off the table for now because it was not funded, however, options should be explored to see how this issue can be addressed internally so that future Panel Site Review teams will be satisfied with the proper integration of these programs into the overall process.*
- Coordinate NET strategic planning with the LTER Network strategic plan. *We are doing this. We will invite the Executive Committee to the July 21st meeting and also include them on distribution for polished drafts of the strategic plan and accompanying documents. We also plan to participate in Coordinating Committee strategic planning meetings, and work together to make appropriate presentation to the All Scientists meeting. It is important to note that the NET plan must follow behind the Network plan, since the Network is a driver for the NET activities.*