

Robert B. Waide

From: JPJekowski@aol.com
Sent: Tuesday, July 15, 2003 2:57 PM
To: rwaide@lternet.edu; wmichene@lternet.edu
Cc: mclcasa@msn.com; PEOTraining@aol.com; jgreene21@comcast.net; jgreene@itpnm.com; JEANLSKI@aol.com; Rhschriver@aol.com
Subject: FOLLOW UP STRATEGIC PLANNING MEETING ON 21ST
Follow Up Flag: Follow up
Flag Status: Flagged

Bob and Bill,

As a reminder, we are set up right now to have our follow up strategic planning meeting on the 21st (next Monday) from 12:00 to 3:00. Are you going to have a room available over in your office complex, and can you have a veiwgraph projector and flip chart available? Here is a proposed agenda:

1. Reconnecting - a review of the final PowerPoint package that I assembled after our meeting on June 5th and 6th, focusing on the Issues Development and how those can be translated into strategies and actions. I will have a highlighted chart showing linkages and additional suggestions that have emerged based on the various things we talked about in the past few weeks to stimulate the discussion. I am hoping to get enough information from this discussion to create a draft strategic plan.
2. Review of action items - we have some of the information identified, and some more to be collected.
3. Review of comments from the National Advisory Board and any impact on schedule or content of the NET Strategic Plan effort. Overall I thought the response was useful, but it is important to note their request to "stay connected" in order to feel comfortable in going with you to NSF next February.
4. A presentation by our ITP folks on an evaluation process - we are looking at existing models in the NSF system, and will present some ideas for discussion. We would also like to gather some input on what are appropriate areas to explore and how the deployment will work (we are assuming right now we can use the LTER Network website). We will also discuss the philosophical and behavioral aspects associated with surveys - how they can drive behaviors and be used to improve communications.
5. Development of next steps and a timeline for subsequent drafts and how to link to the Network Strategic Plan.

Hope all is going well with you - also, can you check on Invoice # ITP10666 that we submitted on May 20th? It is 25 days past due. The amount is for \$7,010.08.

Thanks and we will see you next week - please let us know where the meeting is scheduled.

Jack Jekowski

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7/17/2003

Robert B. Waide

From: JPJekowski@aol.com
Sent: Wednesday, July 23, 2003 11:50 PM
To: rwaide@lternet.edu
Subject: Re: Hanging issues

Bob,

1. Attached are the two PowerPoint presentations from Monday's meeting.
2. Also attached is the revised 11x17 Issues chart with the action items reprioritized from my perspective - you may want to look at this and change it as appropriate. If you do change it, please rename the file and send me a copy so we can stay current. I don't think you need to worry too much about the absolute priority, as long as the lower priority actions are toward the bottom. I've attached all of the files to this email, which means AOL will zip them - if you have trouble opening the individual files, let me know and I will send them under individual emails.
3. I could try to mock up the plan by Tuesday of next week - it will be a bit of a stretch. How many copies would you want, or do you just want to have a sample to pass around? Also, for the final plan, I like to put the CEO's picture in the forward with a message - if you have a jpeg of yourself and would like to do that, send it to me. I can compose a draft statement from your opening comments in June and our discussions on Monday as a starting point, unless you want to put something together that would be an opening message to anyone reading the plan. I usually recommend that it be kept to 3/4 of a page or less if possible.
4. I'll take a look at the mission statement when you send it and incorporate it into the draft document. Should I use the vision statement recommended by the NAB?
5. I don't think a functional diagram needs to be any more complex than showing each functional team, and designating the team leader if appropriate. Those teams should reflect to some degree the key functions being performed by the NET as determined by the Cooperative Agreement and the expectations of the Network and others (like the NAB). We might also want to look at the detail in the December 20th document to assist in identifying key functions to begin to build some consistency across the various documents in the system. This may be helpful in visulizing activities both above and below the line against the strategies and actions. In previous matrixed organizations I have depicted this all on one chart, showing the normal structure as the main chart, and on the right or left side designating "program management" groups, that in most cases replicate the names of individuals in the structural diagram, showing functional responsibility. If you can give me a few examples of functional teams with the names I can sketch up an example to show you.
6. I've developed some complex matrices just using tables in Word. The best way to develop these is through trial and error - choosing various axes and filling in the blocks, then visiting it with individuals to see if it conveys the meaning you intend. Probably sitting down and sketching this out on a white board first would be the best way to create something that would be useful. I had experimented a little at Kalamazoo - but didn't have enough information back then to complete it.
7. I'll take the survey questions and forward those to our survey folks - they are digesting the previous one you sent out yesterday.

7/24/2003

8. I'll work on a draft schedule for the next two months - it would be helpful to know where the Network thinks they will be on their strategic plan after this next meeting and by the time of the ASM so we can run in parallel as much as possible.

I have an 8:00 meeting at IPP (UNM), and then will be heading to Santa Fe for a noon meeting. When I finish with IPP (probably about 9:30), I'll give you a call to see if we can visit for an hour or so.

Jack Jekowski

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Robert B. Waide

From: Sonia Ortega [sortega@lternet.edu]
Sent: Monday, December 08, 2003 1:10 PM
To: Robert B. Waide
Subject: RE: [LTER-netdir] Meeting today

Bob:

Here are some tasks for the education component if you decide to include them. There are not in any priority order.

1. Maintain SLTER website- education coordinator, web designer, outreach coordinator
2. Facilitate interaction of LTER scientists and educators to integrate research into education activities - education coordinator
3. Coordinate annual meetings of LTER educators and scientists- education coordinator
4. Write articles for LTER newsletter- education coordinator, publications coordinator
5. Foster LTER cross-site activities (.e.g. proposal writing) by organizing workshops of education representatives- education coordinator, outreach coordinator
6. Serve as liaison with NSF, ESA and other organizations to plan education activities of common interests- education coordinator

Sonia

-----Original Message-----

From: owner-netdir@lternet.edu [mailto:owner-netdir@lternet.edu] On Behalf Of Robert B. Waide
Sent: Monday, December 08, 2003 9:25 AM
To: netdir@lternet.edu
Subject: [LTER-netdir] Meeting to Box

We have a meeting scheduled at LNO Strategic aspects of the Strategic Plan:

Relations to NSF, UNM, and LTER Plan

Process for Program Evaluation, Priority Setting and Implementation

We will also revisit the exercise from last week relating to developing project teams.

I attach my revision of the appropriate pages of the draft Strategic Plan to serve as a straw man.

Bob

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Robert B. Waide

From: Risser, Paul [paul.risser@osrhe.edu]
Sent: Monday, December 22, 2003 2:31 PM
To: rwaide@lternet.edu
Cc: Risser, Paul; jgosz@lternet.edu
Subject: LNO Strategic Plan
Follow Up Flag: Follow up
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Hi Bob,

I decided that the set of 43 power point slides was indeed the Network Office (LNO) Strategic Plan. Thanks for all your work on it—it has progressed significantly since our meeting in June.

On the other hand, the slide-by-slide format makes it difficult to evaluate the real intentions of the plan. For example, the strategic should set priorities and allocate resources to meet the priorities. With lists of "tasks" in many of the slides, it is difficult to ascertain real priorities within the lists. Examples include the items listed under strategies 1-4.

Moreover, there is no indication of how resources are being allocated, or whether they are likely to be allocated at appropriate levels for each priority.

The reader might be comforted to know that the plan systematically addresses the "weaknesses" as identified in the table on slide (page) 16. I tried to sort through the presentation to see if the weaknesses were addressed—but the correspondence was not very great.

The slides seems to have a number of spurious rubrics. For example, I suspect terrorism is important, but it is unclear what you think of its priority or just how important it is.

It is not clear just how the LNO is effective in bringing in people, points of view and ideas from those outside the LTER family, and more particularly, the Executive Committee.

Although there is to be an Executive Committee survey of the membership in February, there is no way at the moment to see how well the customer's needs are being met. Although UNM will presumably review the Executive Director, it is not clear how the various parts of the LTER program will evaluate the effectiveness of the Executive Director. And, the staff should be given an independent pathway for evaluating the Executive Director.

The cooperative agreement with NSF is important of course, but the real reason for the office is to make the LTER program as successful as possible. This key point seems to get lost in the presentation although there are some items directed toward specific actions.

In summary, the strategic plan might be fine, but in its present format it reads like a list of lists rather than a compelling document that lets the reader know the office has a clear set of priorities, vetted by its constituencies with resources focused on the highest priorities, and that there is a comprehensive and continually acting feedback loop to be sure the Office stays on track.

Hope this helpful.

7/1/2004

Robert B. Waide

From: owner-exec@lternet.edu on behalf of John Hobbie [jhobbie@mbl.edu]
Sent: Wednesday, February 04, 2004 9:15 AM
To: Bob Waide (E-mail)
Cc: exec@lternet.edu
Subject: [LTER-exec] comments on Network Office plan

Comments on Network Office Strategic Plan

Bob - overall, a good job. Only a few glitches. The document jumps back and forth from LNO to Network Office, often on the same page. I don't think the sections on Strengths and Weaknesses, Opportunities and Threats, And Driving Forces belong in this document. The concept of "network of sites" should be added back in to the goals (in Synthesis).

jeh

p. 3 Message from Executive Director: Paragraph 2. should be "facilitating" not "managing". p. 5 Network Vision, Mission, and Goals. Synthesis goal. What happened to the words "network of sites" that used to be a part of this? Don't we want to link the concepts of synthesis and network of sites? The words from the White Paper were "using the network of sites to create general ecological knowledge etc...I think a vital part of the goals has been left out. The LTER Brochure (on web) includes "network of sites" as does the BioScience paper. p. 7 Strategic Planning Process. The words "undertook a quality process" must be jargon. Omit "quality". p. 7 Strategic Planning Process. Diagram. The words "Environmental Scan" should not be used in this document talking about environmental research.

p. 12. Network Office Organizational Structure. What does "cross-organizational teaming" mean? I expected it to mean across organizations but there is only one organization here. Clarify.

p. 13. Network Office Tasking. The ten tasks are OK but the tasks Synthesis, International LTER, and Education need some additional words. Organize synthesis activities? After all, synthesis is not a responsibility of the Network Office but overseeing, organizing, facilitating synthesis is a responsibility. p. 15. Network Office Strengths and Weaknesses. This is an internal document and should not be a part of the Strategic Plan. I don't like the word "client", I don't like the statement about "no leverage over other sites" being a weakness. Is the office a site? Leverage is a troublesome concept here. p. 16. Network Office Opportunities and Threats. Again, useful internally but should not be a part of the Strategic Plan.

p. 17. Network Office Driving Forces. Ditto.

p. 19. "Environmental" scan data. Again, not the right word for a document concerned with environmental studies. p. 38. Four-year Plans and Budgets. The second sub-bullet says "Creation of high-level leadership and facilitation of future Network synthesis activities". Does this mean that the Network Office will create another position for leadership of the Synthesis efforts? Isn't this a departure from the Network Office Mission as stated on page 6? p. 40. LTER Evaluation Process. Are the Executive Committee and the C.C. a part of the process of designing the surveys? The statement here talks about getting feedback from the sites. Getting feedback on a process already well on its way is different from having the C.C. be a part of the process from the start. This is sort of a chicken and egg question but the Exec. and C.C. do have to be brought in at an early stage.

Long-Term Ecological Research Network Mailing List exec@LTERnet.edu
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Robert B. Waide

From: Dan Childers [childers@fiu.edu]
Sent: Sunday, February 15, 2004 3:18 PM
To: rwaide@lternet.edu
Cc: childers@fiu.edu
Subject: LNO Strategic Plan 6

Bob:

I just read through version 6 of your strategic plan. Nice glitzy document! Jack's influence is evident in many places....and I won't comment further on that. Actually, I have no specific comments; only one general one: It seems to me that LNO is in the unique position to provide not just logistical coordination to the network, but also leadership. To me, this "L-word" is very important, yet it was nearly absent from the plan. Is there a worry that the CC and EC will see a threat in having leadership be a strategic goal of the LNO? To my mind, incorporation of leadership as a concept takes the LNO from a mechanical presence to a co-visionary entity (co, that is, with the CC and EC). Waddaya think?

Oh, and great picture of Mary Clutter!

Cya in a week.

Dan

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***** Lab: ECS 262

Robert Waide
Executive Director
LTER Network Office

RE: Comments on LNO Strategic Plan

Dear Bob,

From the materials you sent on 17 December 2003, it is clear that a lot of work and thinking has gone into the materials you have provided us on the LNO plans. Because these are only part of the LTER picture, is there a version of the LTER Network Strategic Plans that I may have missed? I note that your slide 15 indicated that the Bylaws and the Network Strategic Plan were approved at the All Scientists Meeting in September 2003. If those plans are available, could you point me to them (I am assuming they and the bylaws are on the web). Ultimately, we should look at both plans side by side to ensure they will be reinforcing of each other.

I break my comments into several sections. I do not always make concrete suggestions for addressing them, and I likely do not have all the information. From the point of view of other readers of this document, perhaps more information needs to be given where I have comments.

Larger Issues:

- The network level focus on synthesis is absent or played down in your plans. My impression at the NAB is that this was the key focus of the LTER Network for at least the next decade. But somehow this exciting concept is not conveyed in the document you sent, and the relationship to it by your tasks are not always explicit.
- Will there be an implementation plan (with timelines, with people responsible)? Perhaps that is the part of Strategy Deployment (Slide 7). If so, when will that plan, with timelines, be prepared and ready?
- What does the term "owner" mean (used in slides 22-25)? There is little information content on that line, with Executive Director and Associate Directors all responsible for each and every strategy development component. Is this reasonable?

Issues I did not see addressed:

- Has the 12 month of support for Executive Director (mentioned in the note from Gholz) been obtained?
- No justification of COO for LNO was given (Slide 16, under weakness). I note that in light of perception of "overhead of LNO" this is a sensitive issue.

Comments on Opportunities and Threats (Slide 17)

- I strongly encourage other funding opportunities, and I believe the World Bank Funding would be very good. Although, I note, this would likely stray into the realm of international activities.
- Do you have an overview slide presentation of LTER successes on your web site for any member of the LTER community to be able to use? The more people you have talking about LTER successes, the more success LTER will have. It is also a good outreach tool.
- One threat you did not mention is that ultimately your success is intertwined with that of the network, which is not in your control, but in your sphere of influence. Meeting all of your milestones does not equate to success. This is, of course, true in any project or organization (markets change), but seems to point to the need for strategies to engage the entire LTER community.

Edits on Slides:

- Slide 9: “)” missing under NSF Investment Model, under Tools.
- In a couple of places the old abbreviation NET is still used when referring to the Network Office. I caught two places:
 - o Slide 11 in diagram, with Network Office (NET)
 - o Slide 16: Under Strengths, NET involvement in external organizations
 - o Slide 17: Under Opportunities: Linking strategic plans (Network and Net) ...
 - o Slide 18: “Unforeseen turnover at the NET
- Slide 12: This is just an org chart, but I would be interested in seeing the percentage time people have for the responsibilities in the assigned positions.
- Slide 42: What does ILTER have to do with this slide? It is only mentioned in the title. I have no problem with the philosophy articulated in the Jim Gosz quote

Hope that these comments help.

Peter

Robert B. Waide

From: Robert B. Waide [rwaide@lternet.edu]
Sent: Wednesday, April 07, 2004 2:30 PM
To: 'net@lternet.edu'
Subject: Assignments for April 19

Just to reiterate what we discussed in the staff meeting today, we have three assignments for our next meeting:

1. Strategy 1, action 1 - Each project leader on the project table I handed out should consult the project team and list critical processes occurring under each project. For example, a critical process might be the development of the newsletter, the mechanism for renewing contracts annually, or steps that lead to a response to a message to "support". The goal is a list with comments about whether formal process steps exist or need to be developed.
2. Strategy 1, action 2 (Greg (leader), Marsh, Michelle, John, Pam, Samantha, Steven) - Develop a process to identify key existing and desired services and prioritize them using surveys of LTER scientists and sites. If time permits, test the process on the individual and site surveys administered in 2003.
3. Strategy 1, action 3 (Bob (leader), James, Jeanine, Duane, Patty, Sonia, Deanna) - Develop a mechanism to review and prioritize activities in support of LTER sites, the LTER Network, NSF, and other clients. Include mechanisms to re-evaluate these priorities at regular intervals and to incorporate recommendations from the annual review of the LNO by the CC, instructions from NSF, recommendations from the National Advisory Board, and the needs of other clients.

OK?

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Robert B. Waide

From: owner-exec@lternet.edu on behalf of Robert B. Waide [rwaide@lternet.edu]
Sent: Friday, May 28, 2004 2:13 PM
To: exec@lternet.edu
Subject: [LTER-exec] Exec meeting

Time for a recap. The LNO has been asked by NSF to develop a Strategic Plan for submission by the end of this year. The goal that we are trying to reach is a version of the LNO Strategic Plan that the Executive Committee can recommend to the CC for their approval at the Fall meeting. Discussions of the Strategic Plan have been scheduled for the last two Executive Committee Meetings, but have not accomplished the goal. At the Santa Barbara meeting, the Exec indicated that they needed a separate meeting devoted to the Strategic Plan in order to allow the necessary focus for a thorough review. They suggested that there were important points that needed to be resolved before the Strategic Plan was ready to be sent to the CC. It's my job to try and schedule that meeting.

Although the original request was for a two-day meeting, Scott suggests that we need only one day. I think that he is right as long as the participants are well prepared for the meeting. However, it has been very difficult to find even a single day when you can all meet.

So far, the only dates during June and July without known conflicts for anyone are June 20 (Father's Day), June 26-27 (a weekend), and July 2-5 (4th of July weekend).

It looks like four of you are available on June 24.

July 19-20 is also an option, although Peter will be on vacation. Earlier than that runs into the LNO move, and later with multiple conflicts.

We could push the meeting until August, but that leaves the LNO little time to respond to comments before the CC meeting.

So here are the choices for a one-day meeting:

- June 24 (potentially 4 members)
- June 26 (potentially 6 members)
- June 27 (potentially 6 members)
- July 2 (potentially 6 members)
- July 19 (potentially 5 members)
- July 20 (potentially 5 members)

If we can't agree on one of these dates, then you will have to decide on another plan. The bottom line for me is improving the LNO Strategic Plan, not how we do it.

Once more, please let me know which of the above dates are not possible for you.

Bob

Robert B. Waide
Executive Director

Robert B. Waide

From: Robert B. Waide [rwaide@lternet.edu]
Sent: Thursday, June 03, 2004 2:49 PM
To: 'exec@lternet.edu'
Subject: Guidance for LNO Strategic Plan



NET NSF
New letter to PI.

Dear Exec:

I attach the instructions that the LNO received from NSF regarding the development of our Strategic Plan. One question for your consideration as you review the SP is how well we have met the goals set by NSF. Note that the following points are tied closely to the evolving goals and planning activities of the Network, and therefore cannot be finalized without your input:

- c) reporting structures and mechanisms of accountability;
- d) relations to NSF, UNM and the LTER leadership;
- e) processes for program evaluation, priority setting, and priority implementation;
- f) defined role in LTER-wide initiatives;
- g) defined role in LTER-related research;
- h) assessment of the most effective structures and activities for independent advisory groups."

At Santa Barbara, members of the Exec expressed concern about some of the actions listed in the Strategic Plan under Strategies 1-4. Specifically, there were issues about the wording of some of these actions. In addition, there was a suggestion that some of the actions were also appropriate for the Network Plan. Therefore, I would appreciate it if you would focus some of your attention on these actions.

At the February meeting in DC, Jim Levitt made a strong case that each of the actions should be linked to an implementation plan and a set of metrics. I agree that this is desirable, but I don't believe that implementation plans should be a part of the SP, as this would double or triple its length. I believe that these implementation plans should be maintained separately and reviewed as part of the annual review of the LNO by the Executive/Coordinating Committee. I would like your views on this. I can send you an example of the kind of implementation plan we would develop before the conference call, if requested.

Finally, any other comments on the SP would be helpful. We view this as a living document, so I anticipate regular changes as LTER grows and evolves. In the meantime, However, I need to get a time zero version approved by the CC and sent to NSF by December 1. The best approach to achieve this is for the Exec to approve and recommend a draft to the CC. I think it is in all of our interests to avoid a long, point-by-point discussion of the Strategic Plan at the BNZ meeting.

Also, Karen has asked to change the time of the July 2 conference call to 10:30 am Mountain Time. Unless we hear that you have conflicts, we will make this change.

Bob

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Robert B. Waide

From: Debra Peters [debpeter@nmsu.edu]
Sent: Tuesday, June 08, 2004 8:46 AM
To: Robert B. Waide; exec@lternet.edu
Subject: Re: FW: RE: [LTER-exec] strategic plan version 7, Childers' comments

Bob et al.

Here are my comments on the LNO strategic plan. I agree with Dan's comments so I won't repeat them.

One general question: is this the format that the plan will be submitted to NSF? or is this powerpoint presentation for a different purpose? }

slide 3. organization is also unclear in the second to last paragraph. Maybe just change "the organization" to "its organization".

slide 5. delete extra period at end of vision statement. capitalize Earth under Education statement?

slide 6. I think "maintaining a strong public outreach program" is ok.

slide 8. Update Patty Sprott's name? Is "teaming" a word? maybe use teamwork instead.

slide 9. Some of these are not written as tasks (5,6,8,9). Should be consistent and use nouns and verbs for each task listed.

slide 12. Add headers to the two columns to clarify what's being shown here. Change the first two questions in left column to : "How can the LTER Network office... ". Suggest changing the word "discussions" to "changes" in the right column in the sentence starting with "Leadership at UNM ...". Define PR in bottom sentence.

slide 13. Make bottom section consistent throughout (e.g., what is meant by "staffing"?)

slides 15-18. reorganize these actions within each strategy to be in a logical order by grouping similar actions. For example, strategy 1: start with within LNO activities (1, 2, 4) then list network activities (3, 5).

Deb

At 12:40 PM 6/4/2004, Robert B. Waide wrote:

>Dan suggested that I should circulate my comments on some of his
>suggestions for the Strategic Plan. I'm happy to do so.

>

>Bob

>

>-----Original Message-----