



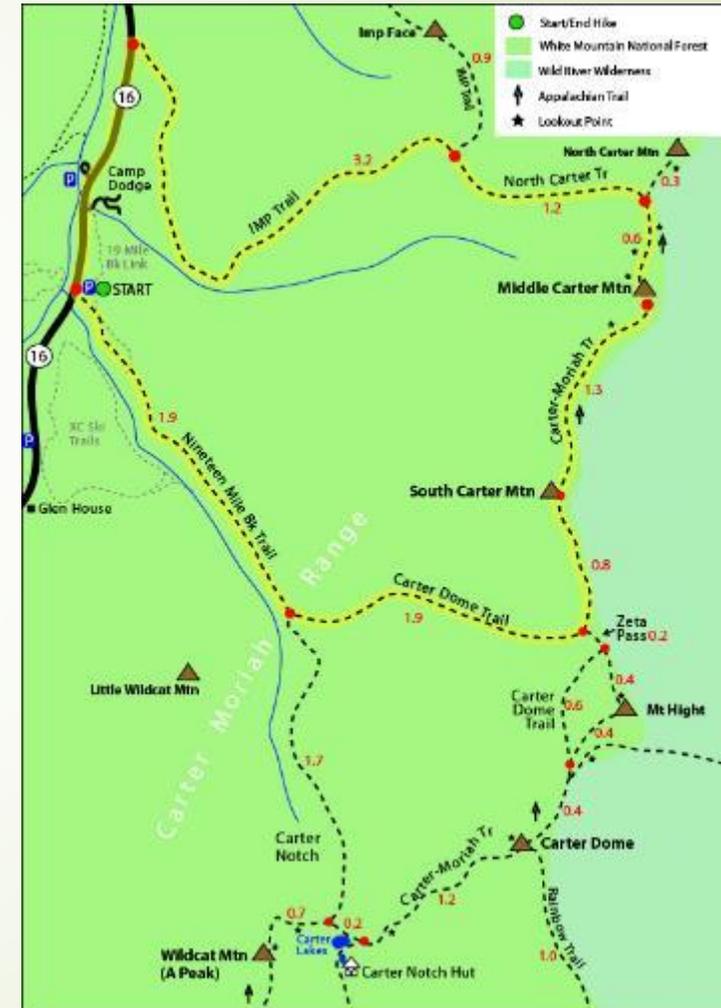
# Herding Cats: A Tale of Two Documents

Coeli Hoover, PhD, USFS  
Research Ecologist, Northern Research Station, NH



# Trail Map

- Background
- Cat Herding Task #1
  - Project rationale/Goals
  - Process, Execution & Challenges
  - What I learned
- Cat Herding Task #2
  - Lather, rinse, repeat
- Overall takeaways
  - Tips for cat herders
  - Circling back



# Background – R & D

- ▶ Organized geographically by Research Station
  - ▶ Within stations, organized by Research Projects/Programs, which center around research problems
- ▶ Basic and applied research
- ▶ We work with scientists in our units, in the station, in other research stations, agencies, academia, etc.
- ▶ Other partners/clients: private landowners, state personnel, National Forest and Grassland personnel, conservation organization staff....



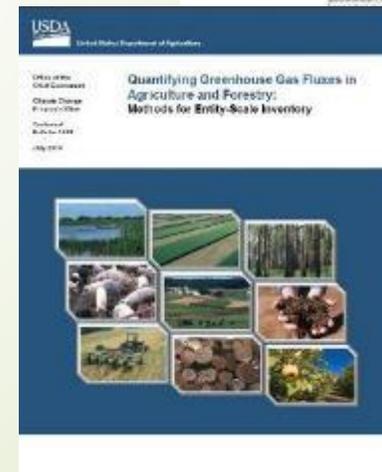
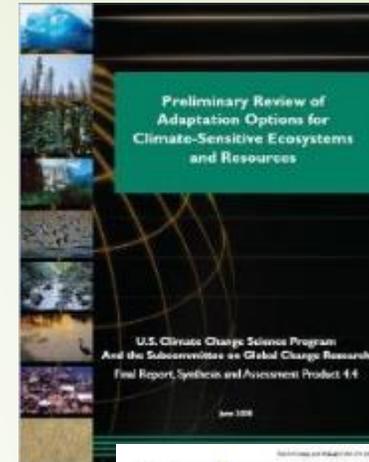


# Background, con't.

- ▶ **Most arrangements are informal and driven by the research question** (we “wing it”)
- ▶ As spatial scales get larger, team projects are the norm
- ▶ Research questions may be complex and long-term in nature
- ▶ Management is supportive; scientists are encouraged to work across boundaries
- ▶ Most common agreements are financial instruments
- ▶ To many in academia, “partnership” means funding from the FS; true collaboration does not always occur

# Team Writing

- Common in research
  - Field manuals; books on specialized topics
  - Grant proposals
  - Reports for national programs: State of the Carbon Cycle, National Climate Assessment, US Greenhouse Gas Inventory Reports, etc.
  - International examples: FAO Reports, Intergovernmental Panel on Climate Change
    - The IPCC team won the Nobel Prize a few years back!
- Implemented in a variety of ways
  - Ad hoc/informal
  - Formal, with a charter and structure
  - Everything in between





# Many possible paths....



- Formal process
  - Team members nominated, selected by leadership
  - Signed charter or official charge
  - Professional administrative/technical support
- Informal process
  - Informal charge from management, or team may be self-formed in response to a perceived need
  - Team members selected by team lead, or volunteer
  - Little or no administrative/technical support
  - Self governed and self directed
- And options that blend aspects of both



# Expedition #1: The “Tier 3 Manual”

- ▶ Workshop held to design a protocol for a landscape-scale forest carbon monitoring program
  - ▶ Part of North American Carbon Program
  - ▶ 43 Participants
- ▶ During workshop, participants discussed variables that might be included in the program
- ▶ Variables chosen by voting
- ▶ One planned product was a field manual outlining the monitoring program, the variables, and methods
- ▶ Participants volunteered to work on chapters

# Ambitious timeline.....

## Timeline for NACP "Tier 3" Initial Activities

Workshop #1	June 25, 2003
Workshop summary report completed/writing assignments made	Sept 17, 2003
Targeted request for 3 pilot study proposals	Sept 19, 2003
Pilot study proposals due	Oct 20, 2003
First draft of manual v 1.0 and journal article	Oct 31, 2003
Proposal peer review complete	Nov 20, 2003
Proposal selection	Nov 30, 2003
Final draft of manual v 1.0 and journal article	Dec 15, 2003
Pilot project initiation and PI meeting	<u>Jan ?</u> , 2003
Initiate fieldwork	Apr 1, 2004
Publish manual v 1.0	Apr 15, 2004
Workshop #2	Jan 2005
Review and revise manual	Feb 2005



# The path forward



- ▶ One scientist for each chapter was lead
  - ▶ POC for technical editor
- ▶ Each chapter team developed outline; organizers approved outlines
- ▶ Chapter teams managed the writing
- ▶ Technical editor managed review process
- ▶ Teams revised chapters
- ▶ Technical editor handled editing, formatting, and working with publisher

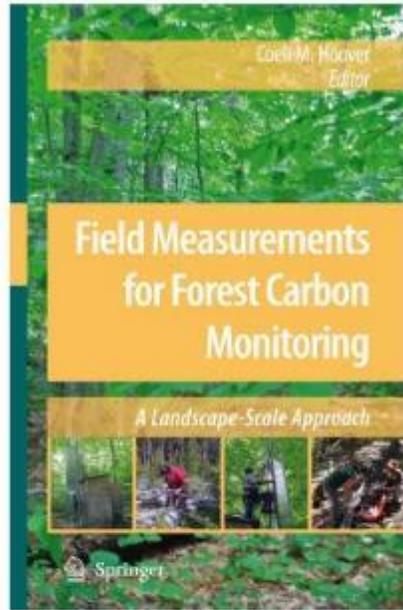
# Challenges....



- ▶ Lack of formal structure = no administrative support
- ▶ Deadlines slipped repeatedly
  - ▶ 17 chapters, 28 authors!
  - ▶ Not all authors strongly committed to project
- ▶ Technical editor lacked leverage with non-performing authors
  - ▶ “I never take anything seriously until someone has asked three times”
- ▶ Group not accountable to a “higher power” (no management support)

What do YOU do when you have a team member who doesn't perform?





2008. XVIII, 242 p. 20 illus. Hardcover

► 89,95 €

C.M. Hoover, US Forest Service, Durham, NH, USA (Ed.)

## Field Measurements for Forest Carbon Monitoring

### A Landscape-Scale Approach

This volume is a comprehensive guide to the methods and techniques employed in forest carbon inventory and monitoring. Since forest carbon research is interdisciplinary, it is unlikely that any one investigator will possess expertise in all of the types of measurements needed to conduct forest carbon research at scales larger than a forest stand. Techniques used to characterize standing stocks of carbon in a forest, measure key carbon fluxes, and collect related data (such as forest canopy nitrogen concentrations and meteorological measurements) that are required to drive process models, develop predictive relationships, and link to remote sensing data are described in detail. In addition to the measurement methods, the chapters include background information, necessary calculations, and equipment requirements. The field of forest carbon research is growing rapidly, and *Field Measurements for Forest Carbon Monitoring* provides an excellent reference for the many and varied techniques necessary to characterize the forest carbon cycle. While the book outlines an entire forest carbon monitoring program, each chapter stands alone as a reference for measuring the variable described, and sufficient back-

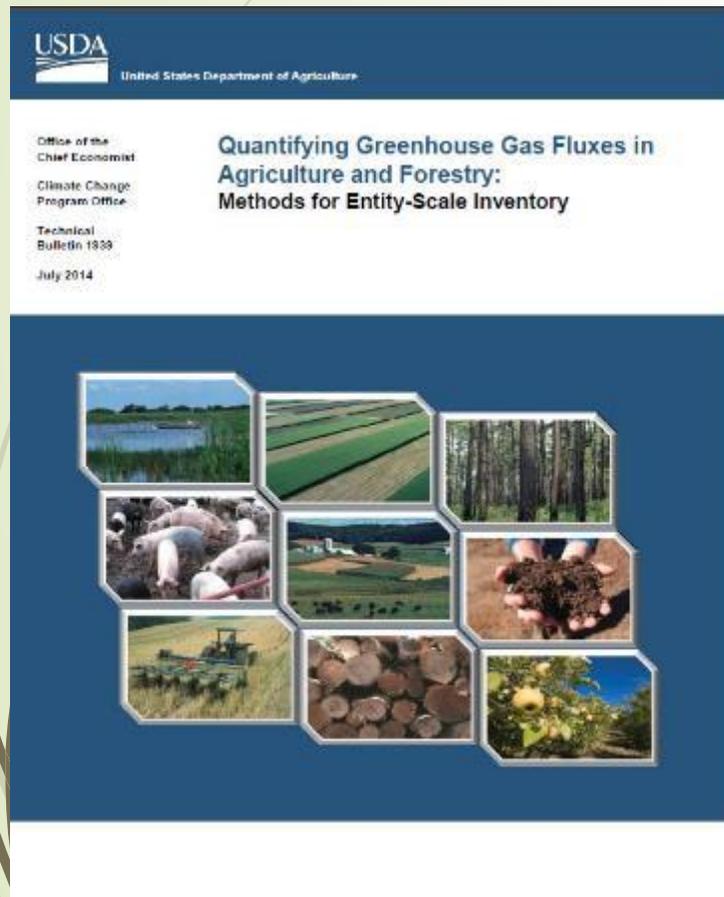
The product turned out to be more than we'd hoped...but was **THREE** years later than originally planned!

# What did I learn?



- Work to ensure buy-in from everyone
  - Address reservations about project or timeline
  - Find another role for those who aren't fully committed to timeline
- Be collaborative, but establish your authority
  - This may require help from further up the food chain
- Establish a schedule for check ins
- Deadlines: adjust if unreasonable, be persistent if they're not

# Expedition #2: Quantifying GHG Fluxes in Agriculture and Forestry

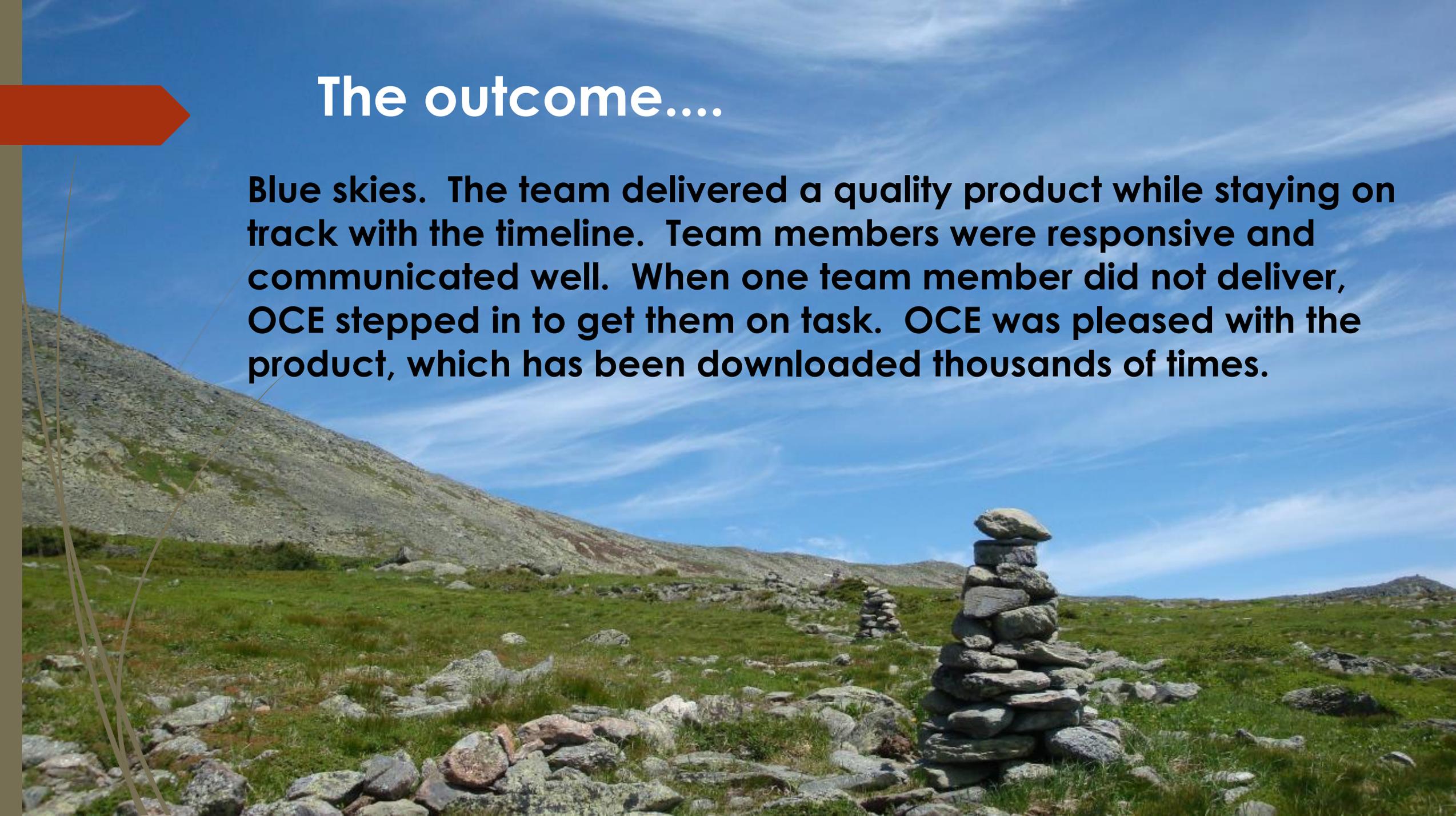


- Mandated in the Farm Bill, overseen by the Office of the Chief Economist, USDA (OCE)
- ICF: consulting firm providing project management, editorial, and administrative support
- Formal process
- Charge and timelines originated with OCE
- Multiple rounds of internal and external review, including public comment period

# The journey....



- Lead author had ability to choose team
  - 11 authors, officially invited by OCE
- Clear charge and sideboards from OCE
- Starting outline developed by lead author
  - Refined and finalized at in person team meeting
- Feedback provided by OCE
- Regular check in calls with writing team
  - Authors raised issues for group input
  - Decisions made by consensus
  - Tough calls referred to OCE
- Recap emails sent after each call
  - Included follow up items



# The outcome....

**Blue skies. The team delivered a quality product while staying on track with the timeline. Team members were responsive and communicated well. When one team member did not deliver, OCE stepped in to get them on task. OCE was pleased with the product, which has been downloaded thousands of times.**

# What made the difference?



- ▶ Administrative support
  - ▶ Editing, conference calls, formatting, review process, communication up the chain handled by consultant
  - ▶ Lead author could focus on team
- ▶ High level support from OCE
  - ▶ Could seek guidance and “backup”
- ▶ In person kickoff meeting and regular two-way communication
- ▶ Commitment from carefully selected team

# Lessons from the trail....



# Be prepared!



- Plan your hike, but also be prepared to change your plan when necessary
- Have a map and compass: be clear about goals and have a written outline
- Allow enough time to reach the summit: reasonable timelines
- Stay on the trail: focus on objectives

# Communication is critical!

- In person kickoff meeting
  - Build rapport (with treats and listening)
  - Collaboratively developed outline = buy in from team
- Regular calls to share ideas and concerns
- Recap emails from after each call
  - Include “to do” items



# Have adequate resources and support



- ▶ Administrative support makes a difference!
  - ▶ Allows more time to focus on communication and timeline
  - ▶ Can monitor the bigger picture
- ▶ Support from a higher level of the organization
  - ▶ Confer and confirm team lead's authority
  - ▶ Navigate obstacles
  - ▶ Assist with "tough calls"

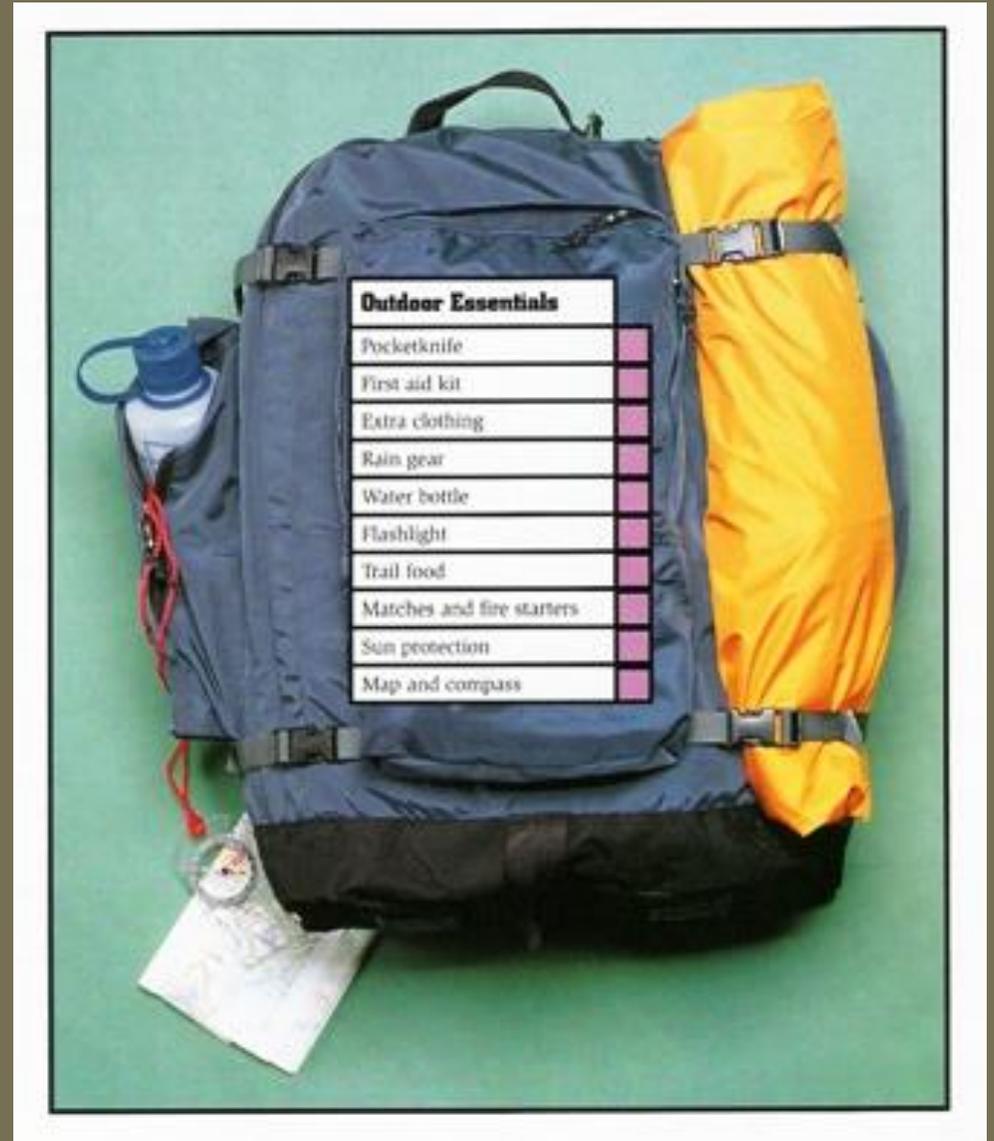
# Tips for cat herders....

- Establish clear direction and shared ownership
- Be clear about expectations. Solicit feedback and adjust.
- Encourage team members to raise questions for group discussion
- Everyone on the same path
- Be firm but fun about deadlines (bribe with treats!)



When you hike, you are supposed to carry the Ten Essentials.

What's in your (project management) pack?



# Circling back to the Academy....



- Building trust
  - Follow up
- Communicating
  - Active listening
  - Repeating back (recaps)
- Getting buy in
- Developing shared vision
- Build consensus
- Identifying assets
- Whole > sum of parts

# Thoughts?

