

INITIATION and MANAGEMENT of a SCIENCE PARTNERSHIP

<http://web.blm.gov/sciencepartnerships>

DESK GUIDE

Scientific partnerships and collaborations are critical to the BLM's continued resource management success. This desk guide is intended to be used as a checklist of key elements for initiating and managing effective partnerships. IM ADD# provides explicit instructions on the sections included here; refer to the IM for formal direction. Detailed examples, as well as resources and tools, are available at the BLM Science Partnership webpage.

INITIATION



1. IDENTIFY THE PURPOSE.

Clearly aligning the partnership's purpose with the objectives of the BLM and our partner(s) is an essential first step toward ensuring meaningful, high-quality results.

- Identify your purpose and need for science as it relates to management
- Hold a kick-off meeting with the partner(s)



2. LEVERAGE PARTNERSHIPS.

The BLM's Science Partnership webpage describes current partnership agreements and existing products.

- Search database for similar work and partners of interest
- Use results to contact partner(s) and BLM staff associated with existing partnership



3. DEVELOP PROJECT OBJECTIVES.

- Descriptive title – If CESU, use this as the first word in the title*
- Purpose – Include benefits to BLM and public
- SMART objectives – Specific, Measurable, Achievable, Realistic, and Timely
- Desired outcomes – Include expected results and how they will be measured
- Delivery method – What is the final product (IM Attach. 1, item 6.d, "Identify Criteria for Deliverables")



4. DETERMINE TYPE OF INSTRUMENT WITH YOUR LOCAL GRANTS MANAGEMENT OR CONTRACTING OFFICE.

Appropriate frameworks include memorandums of understanding, interagency agreements, assistance agreements, and contracts.

- Fill out the SPI form
- Submit form and work with your local GMO and/or CO to establish partnership



5. ENTER PARTNERSHIP INFORMATION IN DIRECTORY OF SCIENCE PARTNERS.

Enter your partnership information on the webpage. Include: agreement number and title, start and end date, COR or PO name, \$ amount; and if applicable, research/science permit number, heritage program, sponsored site steward, and CESU.*



6. DEVELOP PROJECT MANAGEMENT PLAN.

For each project or product:

- Describe how it meets the partnership's overarching purpose (IM Attach. 1, item 1, "Identify the Purpose")
- Develop communication protocols; set schedule and deadlines
- Identify criteria for deliverables/performance goals (including Technology Transfer Product)

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MANAGEMENT



1. FOLLOW MANAGEMENT PLANS AND CHECK IN REGULARLY.

Stay on track by following communication protocols and schedules described in the project management plan.

- Review progress with science partner(s) at several milestones
- Clarify and refine the process as necessary
- Ensure that quality standards and deadlines are met



2. HOLD A CLOSE-OUT MEETING FOR EACH PROJECT.

For each completed project:

- Partner must present results and/or products
- Discuss whether the partnership's purpose and objectives have been met
- Consider, as appropriate, the need for agreement modifications or a follow-up project



3. USE A PEER REVIEW PROCESS (IF APPLICABLE).

Pursuant to requirements outlined in IM 2013-137, the BLM needs to ensure peer review is conducted on all influential scientific information disseminated by the agency. Peer review provided by other partner agencies such as USGS or required to publish articles in scientific journals may meet this requirement as well.



4. FILE RELEVANT MATERIAL WITH THE BLM LIBRARY.

- Relevant materials might include reports, journal articles, presentations, etc.



5. INCLUDE A HIGHLIGHTS SUMMARY ON THE WEBSITE.

- In clear and understandable language, explain how the partnership answered a management question or influenced policy.
- Submit, on the BLM Science Partnership webpage, your story to post in the highlights section

* CESU – universities that are Cooperative Ecosystems Study Units. The acronym CESU must be used as the first word in the title of any agreement that uses this partnership.

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