Evaluation of IM Review Criteria Document
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Some IMs used the IMRC document as a checklist to prepare for the site review. Others used it mostly as a guideline. In some cases the document was used to redesign sites' overall IM system. Reviewers found the document to be very helpful. The general consensus was that it is a useful document and doesn't need much revision.

LTER IM comments:

It needs to be made more accessible because it is difficult to find on the website.

It should place more emphasis on making datasets easy to acquire.

It should require sites to have a comprehensive data catalog and to clearly identify long-term datasets (ideally with a range of dates).

Clarify the following statement "The Information Management System shall include an up-to-date list of current and completed LTER-related research projects." What is the expectation?

Clarify the following statement "Site shall have a management plan for the Information Management System indicating how critical tasks are accomplished by site personnel." What is the expectation?

Should state that datasets be made available through recognized portals like Metacat.

It should include a statement that encourages LTER sites to link information on their websites to related information at other LTER sites.

The requirement for an internal annual review is unnecessary at all sites because in some cases it can be accomplished with informal interactions. There was a feeling that this was micromanaging the way sites do IM and that the emphasis should be placed on results, rather than the process. (See Part A5a. "Site management shall conduct an annual internal review of the site Information Management System."

Document should include more specific information about expectations for backing up data. A site was criticized for not having a centralized system (i.e., individual scientists are responsible for backing up data). The need for centralized backup is currently not explicitly stated in the IMRC document (See Part A2a,b).

Sites should be allowed to have less restrictive data access policies. That is, they should not be required to track users and have them fill out forms before downloading data (Part B2a).

Non-LTER reviewer comments (2 responses):

Add some discussion in the introduction of the IMRC document about the overall function of the data management system, website, and other technology tools in the context of the mission of the LTER program.

Include a statement requiring compliance with LTER network office guidelines and mandates in terms of protocols and appliances used. Each site has its own way of doing things as long as EML metadata was produced and submitted to METACAT. In view of the proposed CI build out

headed by the LNO, this degree of liberty may not be possible anymore, prompting more central leadership and necessitating more site compliance.

Require a minimum level of FTEs and explicitly state what the job demands and expectations for IMs are.

Add a bullet for minimum requirements for CI infrastructure at each site.

Sites can facilitate the review process by posting one or more documents that address the review criteria. One recommendation was to include this information in the IMS management plan (see A4c below).

 In their current form the review guidelines do not address how the review itself should be conducted. NSF could improve the review process by institutionalizing the following two recommendations:

(a) The IM reviewer typically needs to spend at least 3-4 hours talking in depth with the site information manager (and related personnel, as appropriate). Scheduling this discussion before the formal review begins has two important advantages: First, the IM reviewer can convey any serious concerns to the rest of the review team at the outset, so that the entire team can share responsibility for evaluating the situation and making recommendations. Second, the IM reviewer can participate fully in the scheduled review activities, effectively adding a fifth perspective to the rest of the review. To do this the IM reviewer may need to arrive a day early, depending on travel logistics.

(b) The review should include a discussion of information management in a setting where both key site personnel and the entire review team are present. The logical forum for this discussion is a presentation on site information management by the information manager with time for follow-up questions.