

June 6, 2002

TO: APS Users and Staff

FROM: J. Murray Gibson 

SUBJECT: Preliminary Response to APS/User Strategic Planning Meeting

The first APS/User Strategic Planning Meeting was held in Fontana, Wisconsin, on May 15th-17th of this year. I was delighted to observe the strong sense of partnership between the users and APS staff, and the honest dialog among all parties. The level of commitment especially impressed me — 115 people devoted two days of their time and remained deeply engaged throughout. We at APS are very fortunate to have so many dedicated people, both on the staff and in the CATs, whose energy fuels our success. I especially want to acknowledge the efforts of the organizing committee — Michael Borland, Andy Howard (IMCA-CAT), George Srajer, Paul Zschack (UNI-CAT) — and the help of Rose Torres, who set up the venue so successfully.

The meeting would have been a great success if it had produced nothing more than improved dialog, but a lot more was achieved. Despite a healthy diversity of opinions, there was a surprising amount of consensus. The input guides us at APS in establishing priorities, provides us with refreshing ideas, and helps us develop the case for increased funds. You will be hearing much more about the meeting and our strategic planning and policies, beginning with a formal summary report produced by the organizing committee, followed by specific responses from APS. We need to take quick action on several other issues that involve a response to the Department of Energy-Office of Basic Energy Sciences (DOE-BES) peer review of last October, (copies of this have been made available to all CAT directors and APS management), and you will hear more about these very soon. In this message, I identify a few immediate actions we at APS are taking in response to ideas from the strategic planning meeting.

The meeting helped APS management clarify the important distinction between the general “user” and those resident beamline staff who work for the CATs. While we consider these resident beamline staff a subset of the users, it is a very special subset. Resident beamline staff members are, among other things, the primary technical interface with outside users, so it is particularly important that we at APS provide them with strong support. We are considering ways to recognize the special status of our resident users.

There was energized debate about the menu of exciting machine enhancements that the APS can offer to further user science. It was obvious that a lot of dialog will be required to digest the exciting possibilities and to help the APS make good decisions on future enhancements. One immediate action item emerged from this group: to have a *technical workshop on innovative insertion devices (IDs)*. This workshop will lay out the possibilities that could be made available by improved insertion device performance. Liz Moog and John Hill (IXS-CAT) will organize this workshop for the late summer. I envisage this workshop as having two components: one will be centered on the technical characteristics of innovative insertion devices; the second will be devoted to the users scientific demands for improved devices. The workshop will be a model for others that will increase the

technical communication between the APS staff and users. APS decisions to invest in enhancements will be based on the scientific uses that are made possible. Likely the APS will partner with specific users in order to develop novel IDs. Although we expect to provide cost-sharing for developments, we will encourage CATs to seek outside funds for upgrades of insertion devices.

While the machine is rightly praised for its reliability and performance, we need to pay more attention to machine performance all the way to the users' samples. We are developing plans for a *beamline stability/diagnostics team* that will work with the users to diagnose beamline problems, and also provide the control room with a better understanding of the user requirements. Glenn Decker, Horst Friedsam, Barry Lai, and Steve Heald (PNC-CAT) have formed a task force that will recommend a plan of action.

We will go ahead with the establishment of a *detector pool*. Efim Gluskin and Dennis Mills are developing a formal plan for the detector pool that I would like to implement effective October 1st, 2002. I recognize that resources will be needed, including appropriate staffing dedicated to supporting this activity. Further user input will be sought as we develop this plan.

Communication is the lubricant of our enterprise. There was much discussion of how to improve this. Since we are all busy, effectiveness is equally important. We have recently invited user and CAT representatives to our weekly operational directorate meeting. We will continue to re-evaluate all of our meetings, but on the strength of a recommendation from the strategic planning meeting, the APS will implement this summer a new monthly meeting. This will be tentatively called the *APS/CAT OPERATIONAL REVIEW MEETING*. All APS management will be expected to attend the meeting, and we hope also that senior on-site CAT staff will plan to attend regularly. The meeting will be open to everyone, and we aim to attract most APS staff and resident users. The co-chairs of the meeting will be the APS Director, the APS User Organization Chair, and the Chair of the Research Directorate. The meeting will last 90 minutes (of which only 60 minutes will be formally programmed, the rest being available for comments and questions), and will include short highlights on the administrative and technical side (budget, APS machine reports, APS/CAT technical innovations) and science highlights from the CATs. Our hope is that the information exchange will be so valuable that these meetings will be well attended.

One of the mandates from the October 2001 DOE-BES peer review of APS is that we institute a centralized Independent Investigator (II) program. I believe that this will strengthen our II program — as one II said at the planning meeting: “We don't know where the APS front doorbell is.” But in making this change, I share sensitivities expressed at the strategic planning meeting not to interfere with the successful strong CAT-operated II programs (such as those which are national facilities in their own right). A task force comprising Dean Haeffner, Lisa Keefe (IMCA-CAT), John Rose (IMCA-CAT), David Cookson (CARS-CAT), Keith Brister (CARS-CAT), Steve Ginell (SBC-CAT), and Mark Beno (BESSRC-CAT) has been asked to propose, within a month, a measured plan to centralize our II system. I expect to provide resources to support the system and remove some of the burden of II administration from the CATs, while leaving the CATs free to determine the feasibility and scheduling of IIs.

Dialog on the important subject of BES CAT support issues continued at the strategic planning meeting. DOE-BES now plans to make available operational support, through the APS, for CATs in their sphere of interest. Even though this new policy has been an understandably sensitive subject with much debate, I was glad to see some convergence on an appropriate implementation policy. Of critical importance to all is that the

necessary funds to support these enhanced operations be made available by DOE BES. Assuming the promised funds materialize, then the new DOE BES policy is an opportunity to increase CAT effectiveness. At the meeting, the challenge of how to fairly implement the policy was clearly recognized. The task force that I asked to prepare guidelines for the APS implementation policy (Bruce Bunker (MR-CAT), Randy Winans (BESSRC-CAT), Steve Davey, and Dennis Mills) will soon produce a final report. APS will then formulate a policy based on the recommendations.

There was discussion of a related proposal from APS to enhance the Program Evaluation Board (PEB). Based on feedback from the strategic planning meeting, revisions are being made. Input has been solicited from the CATs (and within APS) for the names of additional PEB members. Both the PEB changes and the new BES CAT support policy will be complete for presentation at the next Research Directorate meeting.

As I said at the outset, this message identifies only a few immediate actions that we are taking based on items discussed at the strategic planning meeting. I expect to continue the APS/User dialog on our strategic planning. Thank-you for your commitment to the APS – only by working closely together can we realize the full potential of this outstanding facility.

JMG:rt