

The JOIDES Resolution Science Operator in collaboration with the IODP Program Member Offices carries out the staffing of IODP expeditions. Staffing is typically a multi-step process, aiming to provide critical expertise to the successful delivery of the expedition science objectives, while seeking a well-balanced overall science team.

JOIDES Resolution Staffing Procedures



The JOIDES Resolution Facility Board approved these guidelines on May 15, 2018

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Approved by *JOIDES Resolution* Facility Board: **15 May, 2018**
Latest Revision: **11 May, 2017**

(1) General Purpose

The staffing procedures of the *JOIDES Resolution* (JR) have the goal of assembling the best possible international team of scientists or “Science Party” who together deliver the science objectives of each expedition. The JR Science Operator (JRSO) and the IODP Program Member Offices (PMOs) collaborate closely in preparing each call for applications for scientists; at the same time the JRSO and the US Science Support Program (USSSP) collaborate closely with the other PMOs to staff outreach officer(s). For each expedition, the JRSO first selects the Co-Chief Scientists, and works with those two scientists, USSSP, and all other PMOs in staffing the rest of the Science Party, which may comprise up to 30 scientists, including the outreach officer(s). Staffing decisions take into account, as far as possible, the intellectual contributions made by the original IODP proposal proponents and the critical goal of achieving diversity within the Science Party.

The JRSO monitors overall staffing over multiple expeditions to ensure maintenance of member balance as prescribed in the Memoranda of Understanding (MOU) between the U.S. National Science Foundation (NSF) and each JR Consortium member.

The latest version of the *JOIDES Resolution Staffing Procedures* can be downloaded from <http://iodp.org/jr-facility-policies-procedures-guidelines>.

(2) Process for Call for Applications for Scientists

1. Upon the approval of an expedition schedule by the JR Facility Board (JRFB), the JRSO generates a draft of the Call for Applications for scientists to participate in a JR expedition or drilling project.
2. JRSO staff members work closely with the PMOs to collaboratively determine the deadline(s) for nominations for each expedition or drilling project, any special staffing requirements, and any other requirements or information to be included in the Call for Applications.
3. Incorporating input provided by the PMOs, the JRSO generates a final draft of the Call for Applications; the PMOs provide final comments within one week.
4. The JRSO then generates appropriate expedition science information (including all relevant IODP proposal documents) and places it on the JRSO web site prior

to release of the Call for Applications. Later, the Scientific Prospectus is added to the JRSO web site before invitations are sent out.

5. The JRSO distributes the Call for Applications to the PMOs as well as the IODP Science Support Office (SSO). The SSO places the Call for Applications on the IODP.org web page; each PMO circulates it to its respective communities; and the JRSO advertises the call in appropriate venues (e.g., *EOS*).

(3) Process for Call for Applications for Outreach Officers

1. Upon approval of an expedition schedule by the JRFB, a separate Call for Applications for outreach officers is generated by the USSSP in coordination with the other PMOs.
2. USSSP and the other PMOs advertise the Call for Applications by circulating the call to their respective communities.
3. USSSP distributes the Call for Applications to the PMOs as well as the SSO. The SSO places the Call for Applications on the IODP.org web page; each PMO circulates it to its respective communities.

(4) Staffing Procedures for Co-Chief Scientists and Science Party Members

4-1 Co-Chief Scientist Selection

1. When successful proposals are forwarded to the JRFB for scheduling, the IODP Science Evaluation Panel (SEP) provides Co-Chief Scientist recommendations to the SSO. The SSO in turn provides the list of recommendations to the JRSO.
2. The JRSO reviews the recommendations for Co-Chief Scientists and determines who are the most appropriate individuals to serve as Co-Chief Scientist based on expedition science requirements, individual qualifications and leadership skills, and previous IODP/ODP/DSDP performance.
3. The JRSO communicates with the appropriate PMO before issuing an invitation.
4. Finally, the JRSO issues an official invitation to the individual scientist to serve as Co-Chief Scientist. The JRSO sends a copy of the letter to the PMO.

4-2 Scientist Staffing

1. The PMOs receive applications from their respective science communities and evaluate them through their internal methods.
2. The PMOs provide their nominations (including each nominee's application, CV and other relevant supporting material) to the JRSO. PMOs should be aware of the need for flexibility in staffing JR drilling projects and should provide **(a)** more nominations than the minimum number required to fill the allocated berths, **(b)** variety in scientific expertise amongst the nominees, and **(c)** a rationale for their nomination list, with a ranking of the nominations.
3. The PMOs must provide nominations of scientists with adequate skills in both written and spoken English, as English is used exclusively during meetings at sea and ashore, and for all the scientific and technical writing associated with JR expeditions.
4. Although each JR Consortium member country or consortium is entitled to its full representation according to the MOU between it and NSF, unused berths cannot be "banked."
5. The JRSO shares nominations, CVs, and all PMO supporting materials with the Co-Chief Scientists. The JRSO makes all final staffing decisions, taking into account the Co-Chief Scientists' recommendations and the PMO interests.
6. The JRSO issues official invitations for scientific participation directly to each scientist. The JRSO sends copies to the PMO involved.
7. Staffing is typically a multi-step process. Initial invitations are first sent to key science participants, i.e., those considered to provide critical expertise to the successful delivery of the expedition science objectives. Remaining invitations are sent after the JRSO has received responses from the initial invitations. Sending invitations in different groupings provides the opportunity to tune the science party based on acceptances of the initial invitations.
8. In the event that an invited science party member declines an expedition invitation, or withdraws after accepting, JRSO, in coordination with the Co-Chief Scientists, selects another scientist from the entire existing nomination list from the relevant PMO; alternatively, the JRSO may request the PMO to provide a new nomination not included in the original list. If the relevant PMO is unable to provide a suitable replacement in time, the berth is relinquished by that PMO and may be filled with a qualified scientist nominated by another PMO.
9. Although the JRSO holds the ultimate authority for staffing decisions, they consult and collaborate with each PMO on significant deviations from the PMO's nominations, priorities, and rankings.
10. After the expedition's Science Party is finalized, the JRSO notifies all nominated scientists who were not selected in a timely manner.

4-3 Outreach Officer Staffing

1. The PMOs receive applications from their respective communities and evaluate them through their internal methods.
2. The PMOs inform the JRSO about the number of seagoing outreach officers they intend to staff for the expedition, within established JR Consortium member quota for scientists *and* outreach officers.
3. The PMOs provide their nominations (including each nominee's application, CV and other relevant supporting material) to the JRSO. PMOs should be aware of the need for flexibility in staffing JR drilling projects and should provide (a) more nominations than the minimum number required to fill the allocated berths, (b) variety in outreach expertise amongst the nominees, and (c) a rationale for their nomination list, with a ranking of the nominations.
4. The PMOs must provide nominations of outreach officers with adequate skill in both written and spoken English, as English is used exclusively during meetings at sea and ashore, for all the scientific and technical writing associated with JR expeditions.
5. The JRSO shares nominations, CVs, and all PMO supporting materials with the Co-Chief Scientists and may request input from the USSSP to help balance the outreach components relative to the primary science objectives of an expedition, particularly when more than one outreach officer may be staffed. In this process, regional PMO interests may be taken into account, based on the JRFB-approved long-term regional ship track of the JR.
6. After discussion with the Co-Chief Scientists, USSSP, and the PMO involved, the JRSO decides which outreach officers to add to an expedition Science Party.
7. The JRSO issues official invitations for participation directly to each outreach officer. The JRSO sends copies to the PMO involved and the USSSP.
8. In the event that an invited outreach officer declines an expedition invitation, or withdraws after accepting, the JRSO, in coordination with the Co-Chief Scientists, USSSP, and the relevant PMO, may select an alternate outreach officer from the entire existing nomination list from the relevant PMO; alternatively, JRSO may request the PMO to provide a new nomination not included in the original list. If the relevant PMO is unable to provide a suitable replacement in time, they may decide, at all times, to use that berth to be filled with a scientist instead. However, if the relevant PMO decides to not use the berth for either an outreach officer or scientist, procedures for scientist staffing are followed (**Section 4-2, Guideline 8**).
9. Although the JRSO holds the ultimate authority for staffing decisions, they consult and collaborate with the USSSP and other PMOs on deviations from each PMO's nominations, priorities, and rankings.
10. After the expedition's Science Party is finalized, the JRSO notifies all nominated outreach officers who were not selected in a timely manner.