



# Planning at a National Research Laboratory (Division Level)

## *Creating a Strategy for the Future*

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### **Situation Description**

Even world-class laboratories can lose their edge. Not because their science weakens—but because their focus drifts.

This organizational unit inside a National Research Laboratory had exceptional technical capabilities in several advanced fields tied to national priorities. Its scientists and engineers were highly skilled and widely respected across the institution.

Yet the group's portfolio told a different story.

Over the years, projects had accumulated across a wide range of topics. The unit offered many services, some valuable, but many available elsewhere inside the lab complex or from outside contractors. The work kept the organization busy.

But it blurred what made them unique.

Their distinctive capabilities—the reason the unit existed in the first place—were no longer the clear center of their work. Potential sponsors had difficulty seeing where this group added special value. In an environment where research funding depends on clear mission alignment, that lack of focus created real risk.

The problem was not talent.

It was strategic coherence.

To address the issue, the leadership team stepped back and applied the Logical Framework approach to rethink the organization's direction. Rather than starting with a list of current projects, they began with a deeper question: Where can this unit make its most distinctive contribution to national needs?

The LogFrame helped organize that conversation.

Working through the framework, the team clarified the condition the organization needed to achieve, defined the outcomes required to get there, and examined the assumptions about customers, partnerships, and funding that would shape success.

The exercise sharpened the unit's strategic focus.

Instead of competing broadly across many services, the group could now concentrate on opportunities that leveraged its unique technical strengths and positioned it as a valued partner in national programs.

The lesson is an important one.

Capability alone does not create impact. Impact comes when capabilities are aligned with a clear purpose

# Logical Framework for Planning at a National Research Laboratory (Division Level)

OBJECTIVES	SUCCESS MEASURES	VERIFICATION	ASSUMPTIONS
<p><b>GOAL:</b> Contribute to the DOE mission through high-impact scientific research aligned with national energy and security priorities.</p>	<p><b>GOAL MEASURES:</b></p> <ol style="list-style-type: none"> <li>1. Lab received continued core funding and positive external reviews by ____ (date).</li> <li>2. At least 3 research initiatives adopted by national programs by ____.</li> </ol>	<ol style="list-style-type: none"> <li>1. Annual DOE review reports.</li> <li>2. Funding awards and program adoption memos.</li> </ol>	<p><b>Assumptions to reach Goal:</b></p> <ol style="list-style-type: none"> <li>1. DOE priorities remain stable over the next 3-5 years.</li> <li>2. National labs continue to serve as key R&amp;D players.</li> </ol>
<p><b>PURPOSE:</b> Achieve internal alignment and strategic clarity across division groups in order to focus efforts, improve planning, and elevate scientific contributions.</p>	<p><b>PURPOSE MEASURES:</b></p> <ol style="list-style-type: none"> <li>1. 100% of groups complete strategic plans aligned with division roadmap by ____.</li> <li>2. Internal survey shows <math>\geq 85\%</math> agreement that priorities are clear and aligned by ____.</li> <li>3. Increase in collaborative proposals submitted across groups baseline <math>\pm 20\%</math> by ____.</li> </ol>	<ol style="list-style-type: none"> <li>1. Submitted strategic plans.</li> <li>2. Division-wide survey results.</li> <li>3. Proposal database and submission logs.</li> </ol>	<p><b>Assumptions to achieve Purpose:</b></p> <ol style="list-style-type: none"> <li>1. Leadership remains stable and supports follow-through.</li> <li>2. Groups have capacity to conduct effective planning.</li> <li>3. No disruptive organizational changes derail progress.</li> </ol>
<p><b>OUTCOMES:</b></p> <ol style="list-style-type: none"> <li>1. Common division-wide strategic roadmap developed.</li> <li>2. Individual group plans developed and linked to division strategy.</li> <li>3. Planning skills and tools improved.</li> <li>4. Collaborative research themes identified and prioritized.</li> </ol>	<p><b>OUTCOME MEASURES:</b></p> <ol style="list-style-type: none"> <li>1. Divisions strategy published and endorsed by leadership by ____.</li> <li>2. 100% group leads participate in planning workshops by ____.</li> <li>3. Post-training surveys show 80%+ find planning tools useful by ____.</li> <li>4. At least 3 shared research themes proposed by ____.</li> </ol>	<ol style="list-style-type: none"> <li>1. Strategic Plan Document</li> <li>2. Attendance Logs</li> <li>3. Training feedback survey</li> <li>4. Planning session reports</li> </ol>	<p><b>Assumptions to achieve Outcomes</b></p> <ol style="list-style-type: none"> <li>1. Facilitators can guide the process effectively</li> <li>2. Scientists view planning as valuable (not bureaucratic)</li> <li>3. Lab-wide initiatives don't overshadow local efforts</li> </ol>

<b>INPUTS: <i>How team will produce outcomes?</i></b>		<b>Schedule</b>												<b>Assumptions for Inputs Activities</b>
<b>Tasks</b>	<b>Responsible</b>	<b>J</b>	<b>F</b>	<b>M</b>	<b>A</b>	<b>M</b>	<b>J</b>	<b>J</b>	<b>A</b>	<b>S</b>	<b>O</b>	<b>N</b>	<b>D</b>	
<b>1. DEVELOP STRATEGIC ROADMAP</b> 1.1 Hold kickoff meeting with division leadership 1.2 Facilitate strategic alignment workshop 1.3 Draft and circulate roadmap document 1.4 Finalize after leadership review														
<b>2. LINK GROUP PLANS</b> 2.1 Assign planning reps from each group 2.2 Conduct group-level LogFrame sessions 2.3 Coach leads on planning principles 2.4 Integrate plans with division strategy														
<b>3. IMPROVE PLANNING TOOLS</b> 3.1 Develop tailored LogFrame templates 3.2 Host 2-day training on strategic planning 3.3 Provide ongoing coaching 3.4 Conduct feedback and improvement loop														
<b>4. IDENTIFY COLLABORATIVE THEMES</b> 4.1 Run idea-generation workshops 4.2 Map existing capabilities across groups 4.3 Prioritize themes using criteria 4.4 Report to division leadership for endorsement														