

Organization of Biological Field Stations

Strategic Plan (2021-2026)

***Adapting to a Changing Climate:
Supporting Resilient Stations for Today and for Tomorrow***



Organization of Biological Field Stations

*Supporting environmental research, education, and
public understanding* www.obfs.org

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Executive Summary

The Organization of Biological Field Stations (OBFS) is a 501(c)(3) nonprofit organization. The mission of OBFS is to serve the member stations in ways that increase their effectiveness in research, education, and outreach. The organization will pursue its mission in a manner that maximizes diversity, inclusiveness, sustainability, and transparency.

In 2020, the Board of Directors embarked on the development of a new strategic plan for the organization. It has been over 15 years since the last strategic plan was created, and many key decisions have faced the organization in that time, including the potential hire of an Executive Director. In June 2020, the Board held a virtual planning retreat to determine the priority areas for the new plan. The five priority areas and goals are as follows:

- 1. Collaborations** within the OBFS community and among other organizations
 - Facilitate intra-OBFS membership partnerships and collaborations
 - Facilitate inter-OBFS and other organization partnerships and collaborations
 - Promote collaborative efforts for professional development and training across field stations
 - Coordinate cross-cutting topics with other strategic plan priority teams
- 2. Human Diversity, Equity, and Inclusion (DEI)**
 - View all OBFS policies, activities, and actions through the lens of promoting and ensuring DEI
 - Improve and expand relationships with diverse user groups
 - Develop a comprehensive financial plan to support DEI efforts
- 3. Membership Support and Services**
 - Develop a comprehensive, interactive, and user-friendly website
 - Develop and facilitate useful, engaging meetings and trainings
 - Understand membership trends and facilitate effective communication among the community
- 4. Advocacy—Raising Awareness:** Promoting the value of field stations
 - Raise awareness of the benefits of OBFS for field stations
 - Raise awareness and visibility of OBFS to the outside world
- 5. Governance and Sustainability** for the Organization and Member Stations
 - Implement effective and efficient organizational operations
 - Help support the sustainability of member stations

For each priority-area goal, specific objectives and actions were developed to achieve these goals. Implementation of the plan will be the responsibility of the five priority teams, board & committee members, and the membership, at large. Through the successful implementation of the plan, it is the vision that:

By 2026, OBFS will be an indispensable resource for the field station community, enhancing the value and sustainability of its members with fairness, integrity, transparency, and inclusivity.

Introduction

In the summer of 2020, the OBFS board began a formal strategic planning process, after much discussion over the past two years related to the need to update the previous plan. The last comprehensive strategic plan covering the years 2005-2010 was completed in 2004. The most recent business plan for the organization was completed in 2009. In addition, several emerging issues have surfaced that confirmed the need to develop a new strategic plan. These include branding and marketing needs, diversity initiatives, general member support, potential paid staff, and website enhancement.

Further, the climate is changing for field stations from a variety of perspectives, including cultural, environmental, financial, programmatic, and social. Many of these changes stem from the current global pandemic but most, if not all, will likely remain challenges for stations well into the future. Despite these challenges, it is an exciting time for OBFS with many unique opportunities for the organization. It is our hope and expectation that this process, and ultimately, a new strategic plan, will help enhance and ensure innovation, resiliency, and sustainability among OBFS member stations and affiliates.

Through the successful implementation of the plan, it is the strategic planning team's vision that:

By 2026 OBFS will be an indispensable resource for the field station community, enhancing the value and sustainability of its members, with fairness, integrity, transparency, and inclusivity.

Timeline and Process

On June 27th, 2020, the board and several other OBFS members conducted a day-long virtual retreat to kick off the strategic planning process (Appendix 1). Prior to this retreat, the participants were tasked to review the following materials:

- [OBFS Strategic Plan \(2005-2010\)](#)
- [OBFS Business Plan \(2009\)](#)
- [Field Stations and Marine Labs of the Future: A Strategic Vision](#)
- [Enhancing the value and sustainability of field stations and marine laboratories in the 21st century](#)
- 2018 SWOT Analysis
- 2018 Development Committee Grant Package
- 2020 Member Survey

Taking into account input from a recent member survey, along with the previous strategic plan, various publications and other relevant documents, each retreat participant was asked to submit 3-5 priorities for OBFS over the next five years. From this broad list, we reached a consensus during the retreat on five priority areas around which the plan was developed. These five priority areas for the strategic plan are:

1. **Collaborations** within the OBFS community and with other organizations
2. **Human Diversity, Equity, and Inclusion**
3. **Membership Support and Services**
4. **Advocacy—Raising Awareness:** Promoting the Value of Field Stations
5. **Governance and Sustainability** for the Organization and Member Stations

After identifying the priority areas, co-leaders for each area were identified during the retreat. Additional members were solicited via the listserv and at the annual meeting.

Priority Areas

Priority Area #1 — Collaborations: Collaborations have been identified as an important attribute by the OBFS membership, and OBFS leadership has historically set them as a priority. Collaborations take two forms: a) intra-OBFS (i.e., collaborations among field station members, both domestic and international) and b) inter-organizational e.g., between OBFS members and other organizations and entities. The success of the 2019 annual meeting in Belgium, the first outside of the western hemisphere, is one such area that has led to additional collaborations. An example of an intra-OBFS collaboration is the [Virtual Field Project](#) led by Claudia Luke, Hilary Swain, Sarah Oktay, and Kari O’Connell. OBFS has supported this initiative from the onset and will continue to do so through member participation and dissemination of products, among other contributions. Two examples of inter-organization collaborations which we plan to prioritize and strengthen are with [American Institute of Biological Sciences \(AIBS\)](#) and the [Undergraduate Field Experiences Research Network \(UFERN\)](#). OBFS is a member of AIBS which includes a board rep and opportunities for stations to participate in AIBS events including Congressional Visits Day. Regarding UFERN, the broad collaboration of discipline-based education researchers, natural scientists, and social scientists offers our members unique ways to develop, refine, and assess our research, education, and outreach programs.

Yet another type of collaboration is the sort that many field stations and marine labs have enjoyed with state and federal agencies (mainly natural resource agencies), NGOs such as The Nature Conservancy, and tribes. These have addressed local or regional environmental issues, providing the scientific basis for improving management decisions to enhance sustainability and maintain biodiversity. Furthermore, OBFS is an international organization with member stations in two-dozen countries on five continents. This Priority Area recognizes the importance of strengthening international collaborations for the benefit of all member stations. Key considerations going forward are determining priorities for building collaborations and defining what resources, both human and financial, can be allocated. The collaborations priority area includes several cross-cutting or shared topics with other areas including advocacy, governance, communications, mentoring, and web-page content. Finally, OBFS can play a significant role in fostering intra- and inter- collaborative activities by providing professional development and

educational sessions at meetings and establishing a working group consisting of people with experience collaborating with different entities.

Priority Area #2 — Diversity, Equity, and Inclusion: For OBFS to fulfill our mission and serve our members effectively, the organization and its members must work to prevent bias, discrimination, and dismantle systemic racism and its legacy effects. Our efforts have identified strategies that help OBFS more effectively and explicitly promote diversity and eliminate barriers to participation and access within our constituent community. This includes forging new collaborations, establishing new programs, providing tools, and dedicating resources to help remove barriers to DEI. (NOTE: The Strategic Planning Team is addressing diversity at all levels, including cultural, ethnic, racial, gender, physical, and socioeconomic, among others.)

We recognize there is a lack of diversity within the field sciences and within our community. OBFS is committed to addressing these issues, challenging ourselves to do better, and striving to create a more open, inclusive, and diverse community within our organization, as we listen, learn, and support people of color, other minority groups, and all those who are affected by social injustices. In particular, we seek to enhance the value at our stations through increasing diversity, equity, inclusion and access for all. Our organization has lauded the efforts of our members who have made progress in these areas through the [Human Diversity Award](#), yet we humbly know that we have much more hard work to do. The DEI goals, objectives and action items attempt to address critical concerns and reduce traditional barriers to enhance the value of our members and programs.

Further, we will be seeking input from various collaborators, such as AIBS, [ESA's Strategies for Ecology Education, Diversity and Sustainability program \(SEEDS\)](#), and the [Society for Advancement of Chicanos/Hispanics and Native Americans in Science \(SACNAS\)](#), among others. One initiative, in particular, will be to work with SACNAS and SEEDS on how to better engage HBCUs and Tribal Colleges, especially with regard to recruiting input on identifying obstacles to students taking advantage of field station opportunities and promoting the value of stations to these student populations.

Priority Area #3 — Membership Support and Services: OBFS Member Support provides “bang for the buck” for field stations. Primarily, this is done through providing documentation and opportunities to network for member stations and new/non-member stations looking for resources. Currently, our primary avenues for member support are the website, annual meeting, listserv, and trainings. These services provide underlying functionality for other priority areas identified within the strategic plan. Now, more than ever, OBFS is committed to providing our members with vital support and services. The impacts of the pandemic have highlighted the long-standing challenges of maintaining budgets, staff, and infrastructure at many member stations. Through the Membership Support goals, objectives and actions, OBFS will both enhance existing services, while adding new ones, as we recruit additional stations and retain current members.

Along these lines, targeted efforts will be implemented to increase the number international members, in particular. Initiatives include expanding and strengthening the International Committee, creating regional leads/ambassadors in Africa, Asia, Australia, Europe, India, Latin America and the Caribbean, and establishing a Sponsorship/Mentoring Program that includes pairing a domestic station with an international one.

Priority Area #4 — Advocacy—Raising Awareness: There are two nodes: branding and marketing and advocacy, advancement, promotion, and endorsement. To address these, two distinct avenues were suggested, 1) internal or inward facing (raising awareness and increasing communications to new members and new attendees at our annual meeting) and 2) external or outward facing (raising awareness and designing communication to other groups like the American Institute of Biological Sciences, the Ecological Society of America , etc., the public, other stakeholders (e.g., state, municipal and federal partners, tribal entities, etc.), potential faculty and users. Both avenues entail the development of customized communication tools for different purposes and audiences. The message changes based on the different objectives and audiences (i.e., level of familiarity with our mission and with science, land preservation, and field stations. Many of these dovetail with other sections of this plan and will be coordinated with Member Support and DEI goals.

It should be noted that many of the advocacy efforts are well underway, particularly over the past six months when a small group of members came together to call attention to the impacts of the pandemic on member stations. Through these efforts, concrete steps were taken including an online petition, letters to congressional committees, letters to NSF, and related articles, among others. These efforts highlight the strategic plan's priority to be proactive in raising the awareness of our value to various stakeholders, particularly decision makers and leaders, outside the OBFS community.

Priority Area #5 — Governance and Sustainability: In order to fulfill our mission and serve our members effectively, the Organization must demonstrate sound governance through efficient operations. Due to the volunteer status of participating members, clear guidelines are necessary to insure smooth functioning and transitions in governance, and best practices must be applied with respect to the Organization's financial and human resources. Furthermore, the Organization must promote financial and institutional sustainability in its member stations for its future viability. In order to implement the 2021 OBFS Strategic Plan, the organization requires strong organizational leadership, clear goals and procedures, and sustained effort.

The Board is currently reviewing all of its policies and procedures to ensure clear roles within the organization and smooth transitions for newly-elected and newly-appointed Board Members. Further, we are considering where external contracts may best be utilized to bring in needed technical expertise to allow for the growth and sustainability of the organization.

For each priority area, goals (Table 1), objectives (Table 2) and action items (Table 3) were developed. The Goals, Objectives and Action Items can be seen together in Appendix 4.

Goals, Objectives, and Action Items

Table 1: OBFS Strategic Plan (2021-2026) Goals

Priority Area	Goals
Collaborations	1. Facilitate intra OBFS membership partnerships and collaborations
	2. Facilitate inter OBFS and other organization partnerships and collaborations
	3. Promote collaborative efforts for professional development among field stations, across the globe
	4. Coordinate cross-cutting topics with other Strategic Plan Priority teams
Diversity, Equity, and Inclusion	1. View all OBFS policies and actions through the lens of promoting and ensuring DEI
	2. Improve and expand relationships with diverse user groups
	3. Develop a comprehensive financial plan to support DEI efforts.
Member Support and Services	1. Develop a comprehensive, interactive, and user-friendly website
	2. Develop and facilitate useful, engaging meetings and trainings
	3. Understand membership trends and facilitate effective communication
Advocacy: Raising Awareness	1. Raise awareness of the benefits of OBFS for field stations
	2. Raise awareness and visibility of OBFS to the outside world
Governance and Sustainability	1. Implement effective and efficient organizational operations
	2. Help support the sustainability of member stations

Table 2: OBFS Strategic Plan (2021-2026) Goals and Objectives

Priority Area	Goals and Objectives only
COLL GOAL 1	<i>1. Facilitate intra OBFS membership partnerships and collaborations</i>
Objective COLL—1.1:	Assess current partnerships
COLL GOAL 2	<i>2. Facilitate inter OBFS and other organization partnerships and collaborations</i>
Objective COLL—2.1:	Assess current partnerships
COLL GOAL 3	<i>3. Promote collaborative efforts for professional development and training among field stations, across the globe</i>
Objective COLL—3.1:	Document current efforts for professional development opportunities among OBFS stations
COLL GOAL 4	<i>4. Coordinate cross-cutting topics with other Strategic Plan Priority teams</i>
Objective COLL—4.1:	Review the strategic plan and its implementation to achieve shared goals and objective
DEI GOAL 1	<i>1. View all OBFS policies and actions through the lens of promoting and ensuring DEI</i>
Objective DEI—1.1:	Conduct a needs assessment with guidance and input from a diverse group, including individuals from underrepresented groups
Objective DEI—1.2:	Ensure that OBFS supports best standards and practices for DEI within the organization and across stations
Objective DEI—1.3:	Improve and incentivize training opportunities, professional development, and broadened participation around areas of DEI at all OBFS events
DEI GOAL 2	<i>Improve and expand relationships with diverse user groups</i>
Objective DEI—2.1:	Determine what needs these communities have; what are the barriers to participating in field station work
Objective DEI—2.2:	Distribute outreach material describing the work of field stations and marine labs, OBFS, and the benefits to these communities for engaging in activities
DEI GOAL 3	<i>3. Develop a comprehensive financial plan to support DEI efforts.</i>
Objective DEI—3.1:	Harness financial resources to support DEI efforts at a broad scale
Objective DEI—3.2:	Provide financial support for DEI work at the individual-, station-, and community- level
MEM GOAL 1	<i>1. Develop a comprehensive, interactive, and user-friendly website</i>
Objective MEM—1.1:	Improve the OBFS website Functionality and Aesthetics
MEM GOAL 2	<i>2. Develop and facilitate useful, engaging meetings and trainings</i>
Objective MEM—2.1:	To keep the open, collaborative, and inclusive nature of our annual meeting intact as our organization grows
Objective MEM—2.2:	Determine subjects/need for special trainings or topical mini-conferences that provide support for member stations and possibly non-member stations
MEM GOAL 3	<i>3. Understand membership trends and facilitate effective communication</i>
Objective MEM—3.1:	Perform baseline assessment in membership trends
Objective MEM—3.2:	Improve general and targeted communication between stations and members

Table 2: OBFS Strategic Plan (2021-2026) Goals and Objectives (continued)

RA GOAL 1	1. Raise awareness of the benefits of OBFS for field stations
Objective RA—1.1:	Establish formal ambassadors for OBFS
Objective RA—1.2:	Build a strong base of support among members to support the OBFS mission with a coordinated message
Objective RA—1.3:	Two pronged: a) Maintain the enthusiasm of our new members who attend meetings b) engage members who are unable to attend
Objective RA—1.4:	Gather best practices regarding communication and member service from other organizations and share information with them
RA GOAL 2	2. Raise awareness and visibility of OBFS to the outside world
Objective RA—2.1:	Support development team and development events
Objective RA—2.2:	Support communications team
Objective RA—2.3:	Maximize OBFS exposure through the website
SUS GOAL 1	1. Implement effective and efficient organizational operations
Objective SUS—1.1:	Sustain good governance (through transitions and beyond)
Objective SUS—1.2:	Optimize effectiveness of membership participation
Objective SUS—1.3:	Ensure Organizational financial stability
SUS GOAL 2	2. Help support the sustainability of member stations
Objective SUS—2.1:	Provide manuals, templates and other resources related to operations and maintenance of Stations

Table 3: OBFS Strategic Plan (2021-2026) Action Items

Priority Area	Action Items
1	Catalogue previous and on-going collaborations involving the OBFS members
1	Determine how to improve collaborations within the OBFS members
1	Develop collaboration skill toolboxes that members can employ to strengthen intra OBFS collaborations
1	Catalogue previous and on-going collaborations between OBFS and other organizations
1	Catalog previous and on-going collaborative research and educational activities between member stations and various organizations
1	Catalogue current efforts, feedback, and level of participation among OBFS stations
1	Identify areas where current efforts are not meeting the demand for training and professional development
1	Work with funding agencies and interested parties to build collaborative training and professional development workshops, toolboxes, and materials
2	Collect baseline data on field station personnel and users
2	Review OBFS materials (policies, outreach, marketing, and communications, etc.) for inclusive language and practices
2	Survey potential users from underrepresented groups to understand what OBFS could offer that would be of value
2	Review existing practices and policies; identify areas for improvement; develop best practices
2	Develop OBFS position statement on diversity, equity inclusion

Table 3: OBFS Strategic Plan (2021-2026) Action Items (continued)

2	Explore the feasibility of establishing an OBFS-backed certification system for program personnel and for stations that have met benchmarks
2	Provide DEI training (workshops and concurrent sessions) at every conference
2	Develop a resource list for DEI books, articles, training; host on OBFS website
2	Develop resources and contacts that underrepresented communities can use
2	Include a diverse pool of invited speakers/panelists at OBFS annual meeting
2	Hold listening sessions, distribute surveys, conduct interviews, or in other ways engage in conversation with individuals or institutions
2	Establish a peer-to-peer partnership program between existing OBFS member stations/individuals and new members of the community
2	Distribute outreach material describing the work of field stations and marine labs, OBFS, and the benefits to these communities for engaging in activities
2	Create opportunities for students, teachers, faculty, and researchers from diverse communities to work with OBFS Board and Committees
2	Recruit students who are members of underrepresented groups and provide them with financial support to help with these efforts
2	Apply for funding (e.g., NSF FSML or NSF INCLUDES planning grant) to support strategic planning implementation
2	Identify foundations, donors, and/or grant opportunities that could potentially provide financial support for DEI efforts
2	Develop a strategy to create an endowment within OBFS to support DEI work on a continuing basis
2	Explore the possibility of providing a financial award to the winner of the Human Diversity Award
2	Explore the feasibility of providing a financial award to the station hosting the annual meeting
2	Explore the feasibility of developing an application-based community partner grant
2	Provide financial support directly to field stations/institutions from underrepresented groups (free/sponsored memberships during an introductory period)
2	Develop a small grants program with quick turnaround to support research, education, and outreach efforts at field stations
3	Compile responses to old RFP and membership surveys related to website needs and function
3	Survey web platforms to determine functionality and fit, also find websites for orgs/stations that have similar functions to what we want and ask for contractor recommendations.
3	Hire a contractor to redesign website and provide regular maintenance
3	Enhance and update the library of procedural documents and others
3	Find alternative meeting sites or determine a rotation of larger stations that can host larger meetings
3	Investigate the distributed-linked meeting model for annual meetings
3	Review meeting structure, agenda, and format for inclusivity (have meeting mentors, or something, to help integrate new members)
3	Compile suggestions with the DEI group
3	Investigate having two meetings annually—the in-person membership meeting and a virtual working meeting
3	Review survey results for commentary on this topic
3	Determine desire/need for targeted workshops and trainings
3	Identify opportunities to co-sponsor workshops (with AdvanceGEO, U-FERN, BCEEnet, etc.)

Table 3: OBFS Strategic Plan (2021-2026) Action Items (continued)

3	Seed options for workshop development from member stations (how to build a new something, how to respond to disasters, mental health, etc. etc.)
3	Explore possible funding opportunities, full or in-part, by OBFS or by RCN, FSML, or other grants
3	Discover which station members are retained and which are lapsed
3	Figure out if there are potential commonalities among stations which do not renew membership
3	Determine general demographics of current membership. Size, affiliation, length of membership, etc.
3	Improve general and targeted communication between stations and members
3	Determine if we are communicating with the right people in the right ways at each station
3	Revise information collection on MemberClicks to include other individuals as contacts and types of communications to go to each contact: Add a section in MemberClicks for additional contacts (Education, Facilities, etc.)
4	Set up a google doc with the names and contacts of all non-members, ask members to each pick one station to personally invite
4	Create a Buddy system/mentor system. Encourage member stations to seek out a “buddy director/station”
4	Create a formal expectation of board members to be ambassadors of OBFS through specific actions (provide examples)
4	Review our current brochures, see if they need to be updated and make sure all members know how to get them
4	List critical benefits/what OBFS offers in a one pager
4	Two pronged: a) Maintain the enthusiasm of our new members who attend meetings b) engage members who are unable to attend
4	Develop a Zoom seminar/monthly “Bag lunch” series
4	Aggregate lists of other organizations: (ESA, AIBS, NAML, NERSS, LTER, LTAR, GLEON, etc.) and share our outreach items
4	Create 1-2 sheet summary, communication template for the public
4	Create master list of historical things field stations have done for science in a one-pager
4	Create a one-pager that summarizes how field stations help society
4	Create a Communications TOOLKIT
4	Solicit website content (examples: Photo & Video Contests, newsletters, etc.)
4	Put on website: benefits of membership, what we stand for, who we are. List networking opportunities
4	Award smaller contracts for specific jobs: Investigate granting small contracts to graduate students or undergrads for web design or communication pieces
4	Create 1-2 pager with specific expectations of board members regarding recruitment, donations, oversight of strategic plan action items, etc.
5	Create/update Policies and Procedures Manual
5	Create/update a historical document of office holders and committees
5	Examine the feasibility of volunteer board/membership to successfully implement 2021-26 Strategic Plan
5	Explore membership recruitment/palatability for more OBFS engagement
5	Assess financial requirements based on 2021 Strategic Plan
5	Explore funding options, diversify through grants, membership dues and fundraising
5	Make documents available to membership
5	Update/compile/archive user guides/best management practices
5	Generate items to provide Advocacy for FSML

Capitalizing on Our Strengths

In many of the goals and objectives, we aim to capitalize on our existing strengths. One area of strength that has been documented by the membership is the annual meeting. In 2020, the Annual Meeting Planning Committee put together our first-ever virtual meeting in September, *“Adaptation and Resiliency in a changing world,”* with over 200 registrants—a record number. From the initial workshops, through the plenaries, lightning talks and concurrent sessions, the week was filled with a diverse array of speakers who shared their expertise and experiences, along with keen insights and inspiration. Combined with the new member welcome reception, social hours and the auction, the camaraderie, collegiality, and collaborative nature of the OBFS community were displayed throughout. Moving forward, we plan to maintain a virtual aspect to future annual meetings to complement the in-person attendance and maximize the number of participants. Further, this strategic plan includes the development and facilitation of additional engaged meetings and trainings throughout the year. For example, a monthly “Bag Lunch” series is included in the “Raising Awareness” priority team, as well as mini-conferences around topical issues. Secondly, the plan builds upon the cohesive, collaborative nature of the OBFS community in proposing peer-to-peer mentoring among stations, and in supporting existing collaborative networks such as [AIBS](#), the [Virtual Field](#) and [UFERN](#), while strengthening relatively newer ones such as [SACNAS](#) and [SEEDS](#).

Opportunities for Growth

Throughout the strategic planning process, two areas of attention repeatedly surfaced: enhancing the website and increasing diversity, equity, and inclusion both within the Board and at member stations. Several action items, across all priority areas, propose making additions and improvements to the website to enhance both the functionality and aesthetics of the site. The plan calls for a survey of web platforms and websites to find models suitable for our use. Expanding and updating the Best Management Practices (BMPs), how-to-manuals and other reference documents are among several proposed upgrades.

Secondly, the plan demonstrates our commitment to increasing diversity, ensuring equity, and expanding access at our stations. The DEI priority team has outlined numerous strategies that effectively and explicitly promote diversity and eliminate barriers to participation and access within our constituent community.

Another opportunity for growth is in the area of raising awareness of the value of field stations to various audiences from elected officials, stakeholders, and the general public. Towards this end, the Board has reestablished the [OBFS Newsletter](#) which provides relevant, up-to-date information to our members and highlights the many activities within the community. Further, the board and other OBFS members posted an [online petition](#) for individuals and organizations to express their support of field stations, particularly in light of the pandemic. A [viewpoint article](#)

was published in *BioScience* (Swing et al. 2021), and a letter was sent to the National Science Foundation, Directorate for Biological Sciences, and the FSML program officers at NSF. In addition, we partnered with AIBS to ask Congress for targeted funding assistance to support the operations and maintenance of FSMLs. Moving forward, the Raising Awareness team has proposed the creation of a communications toolkit for members and several related one-pagers for marketing.

Lastly, with the success of the 2019 annual meeting in Belgium, coupled with the International Committee, there are greater opportunities to both increase our membership across the globe and facilitate broad-scale collaborations.

Sustainability

Underlying the entire plan is the stability and the sustainability of the organization itself. To ensure OBFS remains on sound footing, both structurally and financially, well into the future, the Sustainability team has already started the process of updating all of the board's policies and procedures. Further, we propose to establish new board orientations and training documents to ensure a smooth transition from election to election. In addition, the team has been examining the feasibility of a volunteer board, with help from the membership, to successfully implement this strategic plan. When deemed necessary, specific facets of the plan will be outsourced to professionals and/or graduate students to implement respective action items. The plan calls for diversifying the OBFS revenue streams through foundation awards, grant funding, and donor recruitment. The plan also proposes ways to recruit, retain, and engage more members with the organization which will help ensure the long-term viability of the Organization.

Investments in the Plan

Significant financial investments in the plan are critical to ensure its success. Big-ticket items include website overhaul; diversity training programs and speakers; recruitment of underrepresented students, faculty and staff; development and distribution of outreach materials; and grants and/or stipends to member stations or individuals to support research, education, and outreach programs. Initial estimates range from approximately \$132,000 USD in initial investments over the first year of the plan and an additional \$57,000 USD/year over the five-year life of the plan. Specific items are listed in Table 3.

It should be noted that the OBFS Business Plan created in 2009 recommended the consideration a paid staff member, specifically a full or half-time Executive Director. At that time, the estimated costs of staffing an office with a full-time ED are \$250,000 USD/year (or \$125,000 USD for a half-time position). Funds from the annual auction were earmarked for such a position and the revenue invested accordingly. Within the past two years, the investment account reached a level to seriously consider making the leap to a paid staff person and was part of the impetus for developing a new strategic plan. From this recent strategic planning process, a more project-

based approach and outsourcing pieces of the plan emerged as an alternate to hiring a paid staff person.

Currently, the Organization has accumulated restricted funds, primarily through proceeds from the auction at the annual meeting and investment earnings, to cover the potential expenses for implementing the plan. At the same time, the board, particularly the Development Committee, along with the Priority Team members, are working on identifying grants to fund portions of the plan. The guiding principle will be to seek external funding where possible and utilize existing OBFS funds when necessary.

Table 4: OBFS Strategic Plan (2021-2026) Expense Estimates

Proposed Action Items (as yet unprioritized other than #1 website)	Initial Cost (Year 1)	Recurring Cost	Potential Funding Source (External, Internal/OBFS)
Website Development	\$50-100,000	\$10,000	Internal (need non-profit-friendly developer)
Compile and catalogue Best Management Practices on diversity, equity, and inclusion	\$10,000	\$1,000	Foundations
Survey underrepresented groups to identify areas of improvement	\$10-20,000	\$1,000	Foundations (group with BMPs)
Scholarships and financial support for underrepresented groups	\$15-25,000	\$15-25,000	Internal; Foundations (group with survey)
Develop and offer DEI trainings and workshops	\$10-25,000	\$10-15,000	NSF LEAPS
Invite plenary speakers around DEI topics	\$10-15,000	\$10,000	NSF LEAPS
Explore feasibility of establishing a DEI-certification program around practices and policies	\$5-15,000	\$1-5,000	NSF LEAPS
Compile and catalogue member demographics related to DEI	\$5-10,000	\$1-3,000	NSF LEAPS
Develop and offer exchange trainings and workshops between field stations	\$5-10,000	\$5,000	Member stations; Regional research networks;
Develop, publish, and distribute 1-pagers for various audiences	\$5,000	\$1,000	Internal
Contracts for graduate students to work on small-scale projects	\$5-10,000	\$1-5,000	Internal; University graduate research funds (e.g., non-profit MPA or communications program)
Miscellaneous	\$5,000	\$1,000	
TOTAL EXPENSES	\$135,000-\$225,000	\$56,000 – \$81,000/year	

Implementation of the Plan

A plan is only as good as its implementation. To achieve the goals and objectives of the plan and to complete the proposed action items, we have identified responsible parties (individuals, committees, and mechanisms) for each aspect of the plan. To start, at least one member of each of the five priority teams will take ownership of the implementation phase of the plan. In other words, many of the strategic planning team members will transition to the strategic plan implementation team. Further, each standing committee of OBFS will be assigned those action items that pertain to the charge and purview of the respective committee (Appendix 2). We are also asking that at least one member of each of the priority teams join the existing committees to ensure familiarity and continuity with the plan's details and the committees' actions. At each quarterly board meeting, a review of the status of the plan and its action items will be made. Further, at each annual meeting, a report of the strategic plan will be presented during the business meeting. Lastly, an ongoing status report, including action items completed and expenses incurred will be posted on the OBFS website with regular updates to ensure accountability and transparency.

Benchmarks

To help ensure that we reach our goals and objectives outlined in the plan, the priority teams have identified cross-cutting action item and have estimated a timeline for the completion of the action items. Subsequently, they have categorized them into short-term (within one year), intermediate items (one-three years) and long-term items (within five years) to assist in the implementation of the plan.

Conclusions

It is our hope that this plan provides the methods, means, and structure for people to participate in meaningful ways to advance the goals, mission, and vision of OBFS. Through the successful implementation of the plan, we envision that:

By 2026, OBFS will be an indispensable resource for the field station community, enhancing the value and sustainability of its members with fairness, integrity, transparency, and inclusivity.

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Appendices

Appendix 1. Strategic Planning Team

1. Collaborations within the OBFS community and with other organizations

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3. Member Support and Services

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4. Advocacy—Raising Awareness: Promoting the value of Field Stations

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5. Governance and Sustainability for the Organization and Member Stations

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Appendix 2. OBFS Governance Structure--2020

Elected Officers (Executive Committee)

Office	Officer	Term*
President	Chris Lorentz	2020-2022
Past President ¹	Stacy McNulty (ex officio)	2020-2022
Vice President	Brett Biebuyck	2019-2021
Secretary	Lesley Knoll	2020-2022
Treasurer	Paul Wetzel	2019-2021
Member at Large – One	Jason Wallace	2019-2021
Member at Large – Two	Elizabeth Long	2020-2022
Member at Large - Early Career	Faustine Bernadac	2020-2022

Board-Selected Officers

Office	Officer	Term*
Editor	Sarah Oktay	2019-2021
Network Coordinator	Jason Tallant	2020-2022

Organizational Standing Committees

Committees and other Board roles	Name	Term*
Annual Meeting	Brett Biebuyck (ex officio, VP)	2019-2021
Finance and Membership	Paul Wetzel (ex officio, Treasurer)	2019-2021
subcommittee: Investment**	Peter Connors	ongoing
Governance	Shane Waddell	2020
subcommittee: Nominations**	Stacy McNulty (ex officio, Past President)	as needed
Human Diversity	Amy Whipple	2020
International	David Maneli	2020
Organizational Development	Brian Kloeppel	2020
Outreach	Lisa Busch	2020
Communications Subcommittee	Vanessa Trujillo	2020
AIBS Liaison	Paul Foster	2020
Historian	Mary Hufty (ex officio, Historian)	2020

Appendix 3. OBFS Governance Structure--2021**Elected Officers (Executive Committee)**

Office	Officer	Term*
President	Chris Lorentz	2020-2022
Past President ¹	Stacy McNulty (ex officio)	2020-2022
Vice President	Lara Roketenetz	2021-2023
Secretary	Lesley Knoll	2020-2022
Treasurer	Paul Wetzel	2019-2021
Member at Large – One	Rhonda Struminger	2021-2023
Member at Large – Two	Elizabeth Long	2020-2022
Member at Large - Early Career	Faustine Bernadac	2020-2022

Board-Selected Officers

Office	Officer	Term*
Editor	Sarah Oktay	2019-2021
Network Coordinator	Jason Tallant	2018-2020

Organizational Standing Committees

Committees and other Board roles	Name	Term*
Annual Meeting	Lara Roketenetz (ex officio, VP)	2021-2023
Finance and Membership	Paul Wetzel (ex officio, Treasurer)	2021-2023
subcommittee: Investment**	Peter Connors	ongoing
Governance	Shane Waddell	2020
subcommittee: Nominations**	Stacy McNulty (ex officio, Past President)	as needed
Human Diversity	Phoebe Jekielek and Tori McDermott	2021
International	David Maneli	2021
Organizational Development	Brian Kloeppel	2021
Outreach	Lisa Busch	2021
Communications Subcommittee	Vanessa Trujillo	2021
AIBS Liaison	Paul Foster	2021
Historian	Mary Hufty (ex officio, Historian)	2021

Appendix 4. OBFS Strategic Plan (2021-2026) Goals and Objectives

Priority Area	Goals, Objectives, and Action Items
COLL GOAL 1	<i>1. Facilitate intra OBFS membership partnerships and collaborations</i>
Objective COLL—1.1:	Assess current partnerships
Action Item COLL—1.1.1:	Catalog previous and on-going collaborations involving the OBFS members
Action Item COLL—1.1.2:	Determine how to improve collaborations within the OBFS members
Action Item COLL—1.1.3:	Develop collaboration skill toolboxes that members can employ to strengthen intra OBFS collaborations
COLL GOAL 2	<i>2. Facilitate inter OBFS and other organization partnerships and collaborations</i>
Objective COLL—2.1:	Assess current partnerships
Action Item COLL—2.1.1:	Catalog previous and on-going collaborations between OBFS and other organizations
Action Item COLL—2.1.2:	Catalog previous and on-going collaborative research and educational activities between member stations and various organizations
COLL GOAL 3	<i>3. Promote collaborative efforts for professional development and training among field stations, across the globe</i>
Objective COLL—3.1:	Document current efforts of professional development opportunities among OBFS stations
Action Item COLL—3.1.1:	Catalogue current efforts, feedback, and level of participation among OBFS stations
Action Item COLL—3.1.2:	Identify areas where current efforts are not meeting the demand for training and professional development
Action Item COLL—3.1.3:	Work with funding agencies and interested parties to build collaborative training and professional development workshops, toolboxes, and materials
COLL GOAL 4	<i>4. Coordinate cross-cutting topics with other Strategic Plan Priority teams</i>
Objective COLL—4.1:	Review the strategic plan and its implementation to achieve shared goals and objective
Action Item COLL—4.1.1:	Identify areas where shared goals and objectives overlap and coordinate with members of the implementation team on those efforts
DEI GOAL 1	<i>1. View all OBFS policies, activities, and actions through the lens of promoting and ensuring DEI</i>
Objective DEI—1.1:	Conduct a needs assessment with guidance and input from a diverse group, including individuals from underrepresented groups
Action Item DEI—1.1.1:	Collect baseline data on field station personnel and users
Action Item DEI—1.1.2:	Review OBFS materials (policies, outreach, marketing, and communications, etc.) for inclusive language and practices

Action Item DEI—1.1.3:	Survey potential users from underrepresented groups to understand what OBFS could offer that would be of value
Objective DEI—1.2:	Ensure that OBFS supports best standards and practices for DEI within the organization and across stations
Action Item DEI—1.2.1:	Review existing practices and policies; identify areas for improvement; develop best practices
Action Item DEI—1.2.2:	Develop OBFS position statement on diversity, equity inclusion
Action Item DEI—1.2.3:	Explore the feasibility of establishing an OBFS-backed certification system for program personnel and for stations that have met benchmarks
Objective DEI—1.3:	Improve and incentivize training opportunities, professional development, and broadened participation around areas of DEI at all OBFS events
Action Item DEI 1.3.1:	Provide DEI training (workshops and concurrent sessions) at every conference
Action Item DEI 1.3.2:	Develop a resource list for DEI books, articles, training; host on OBFS website
Action Item DEI 1.3.3:	Develop resources and contacts that underrepresented communities can use
Action Item DEI 1.3.4:	Include a diverse pool of invited speakers/panelists at OBFS annual meeting
DEI GOAL 2	<i>Improve and expand relationships with diverse user groups</i>
Objective DEI—2.1:	Determine what needs these communities have; what are the barriers to participating in field station work
Action Item DEI—2.1.1:	Hold listening sessions, distribute surveys, conduct interviews, or in other ways engage in conversation with individuals or institutions
Action Item DEI—2.1.2:	Establish a peer-to-peer partnership program between existing OBFS member stations/individuals and new members of the community
Objective DEI—2.2:	Distribute outreach material describing the work of field stations and marine labs, OBFS, and the benefits to these communities for engaging in activities
Action Item DEI—2.2.1:	Distribute outreach material describing the work of field stations and marine labs, OBFS, and the benefits to these communities for engaging in activities
Action Item DEI—2.2.2:	Create opportunities for students, teachers, faculty, and researchers from diverse communities to work with OBFS Board and Committees
Action Item DEI—2.2.3:	Recruit students who are members of underrepresented groups and provide them with financial support to help with these efforts
DEI GOAL 3	<i>3. Develop a comprehensive financial plan to support DEI efforts.</i>
Objective DEI—3.1:	Harness financial resources to support DEI efforts at a broad scale
Action Item DEI—3.1.1:	Apply for funding (e.g., NSF FSML or NSF INCLUDES planning grant) to support strategic planning implementation
Action Item DEI—3.1.2:	Identify foundations, donors, and/or grant opportunities that could potentially provide financial support for DEI efforts

Action Item DEI—3.1.3:	Develop a strategy to create an endowment within OBFS to support DEI work on a continuing basis
Objective DEI—3.2:	Provide financial support for DEI work at the individual-, station-, and community- level
Action Item DEI—3.2.1:	Explore the possibility of providing a financial award to the winner of the Human Diversity Award
Action Item DEI—3.2.2:	Explore the feasibility of providing a financial award to the station hosting the annual meeting
Action Item DEI—3.2.3:	Explore the feasibility of developing an application-based community partner grant
Action Item DEI—3.2.4:	Provide financial support directly to field stations/institutions from underrepresented groups (free/ sponsored memberships during an introductory period)
Action Item DEI—3.2.5:	Develop a small grants program with quick turnaround to support research, education, and outreach efforts at field stations
MEM GOAL 1	<i>1. Develop a comprehensive, interactive and user-friendly website</i>
Objective MEM—1.1:	Improve the OBFS website Functionality and Aesthetics: Update the general look of the website; Make the OBFS website a more dynamic resource;
Action Item MEM—1.1.1:	Compile responses to old RFP and membership surveys related to website needs and function
Action Item MEM—1.1.2:	Survey web platforms to determine functionality and fit, also find websites for orgs/stations that have similar functions to what we want and ask for recommendations.
Action Item MEM—1.1.3:	Hire a contractor to redesign website and provide regular maintenance
Action Item MEM—1.1.4:	Enhance and update the library of procedural documents and others
MEM GOAL 2	<i>2. Develop and facilitate useful, engaging meetings and trainings</i>
Objective MEM—2.1:	To keep the open, collaborative, and inclusive nature of our annual meeting intact as our organization grows
Action Item MEM—2.1.1:	Find alternative meeting sites or determine a rotation of larger stations that can host larger meetings
Action Item MEM—2.1.2:	Investigate the distributed-linked meeting model for annual meetings
Action Item MEM—2.1.3:	Review meeting structure, agenda, and format for inclusivity (have meeting mentors, or something, to help integrate new members)
Action Item MEM—2.1.4:	Compile suggestions here with the DEI group
Objective MEM—2.2:	Determine subjects/need for special trainings or topical mini-conferences that provide support for member stations and possibly non-member stations
Action Item MEM—2.2.1:	Investigate having two meetings annually—the in-person membership meeting and a virtual working meeting

Action Item MEM—2.2.2:	Review survey results for commentary on this topic
Action Item MEM—2.2.3a:	Determine desire/need for targeted workshops and trainings
Action Item MEM—2.2.3b:	Identify opportunities to co-sponsor workshops (with AdvanceGEO, U-FERN, BCEEnet, etc.)
Action Item MEM—2.2.3c:	Seed options for workshop development from member stations (how to build a new something, how to respond to disasters, mental health, etc. etc.)
Action Item MEM—2.2.4:	Explore possible funding opportunities, full or in-part, by OBFS or by RCN, FSML, or other grants
	FSML planning grant to explore and model new formats for workshops and engagement of field station personnel???
MEM GOAL 3	<i>3. Understand membership trends and facilitate effective communication</i>
Objective MEM—3.1:	Perform baseline assessment in membership trends
Action Item MEM—3.1.1:	Discover which member stations are retained and which lapse
Action Item MEM—3.1.2:	Figure out if there are potential commonalities among stations which do not renew membership
Action Item MEM—3.1.3:	Determine general demographics of current membership. Size, affiliation, length of membership, etc.
Objective MEM—3.2:	Improve general and targeted communication between stations and members
Action Item MEM—3.2.1:	Determine if we are communicating with the right people in the right ways at each station
Action Item MEM—3.3.2:	Revise information collection on MemberClicks to include other individuals to include as contacts and types of communications to go to each contact: Add a section in MemberClicks for additional contacts (Education, Facilities, etc.)
RA GOAL 1	<i>1. Raise awareness of the benefits of OBFS for field stations</i>
Objective RA—1.1:	Establish formal ambassadors for OBFS
Action Item RA—1.1.1:	Set up a google doc with the names and contacts of all non-members, ask members to each pick one station to personally invite
Action Item RA—1.1.2:	Create a Buddy system/mentor system. Encourage member stations to seek out a “buddy director/station”
Action Item RA—1.1.3:	Create a formal expectation of board members to be ambassadors of OBFS through specific actions (provide examples)
Objective RA—1.2:	Build a strong base of support among members to support the OBFS mission with a coordinated message
Action Item RA—1.2.1:	Review our current brochures, see if they need to be updated and make sure all members know how to get them
Action Item RA—1.2.2:	List critical benefits/what OBFS offers in a <i>one pager</i>

Action Item RA—1.2.3:	Create one-pagers for interactions with governmental officials at Congressional Visits Day (CVD) or for stakeholder/public meetings
Objective RA—1.3:	Two pronged: a) Maintain the enthusiasm of our new members who attend meetings b) engage members who are unable to attend
Action Item RA—1.3.1:	Zoom seminar/monthly “Bag lunch” series
Objective RA—1.4:	Gather best practices regarding communication and member service from other organizations and share information with them
Action Item RA—1.4.1:	Aggregate lists of other organizations: (ESA, AIBS, NAML, NERSS, LTER, LTAR, GLEON, etc.) and share our outreach items
RA GOAL 2	2. Raise awareness and visibility of OBFS to the outside world
Objective RA—2.1:	Support development team and development events
Objective RA—2.2:	Support communications team
Action Item RA—2.2.1:	Create 1-2 sheet summary, communication template for the public
Action Item RA—2.2.2:	Create master list of historical things field stations have done for science in a one-pager
Action Item RA—2.2.3:	Create a one-pager that summarizes how field stations help society
Action Item RA—2.2.4:	Create a Communications TOOLKIT
Objective RA—2.3:	Maximize OBFS exposure through the website
Action Item RA—2.3.1:	Solicit website content (examples: Photo & Video Contests, newsletters, etc.)
Action Item RA—2.3.2:	Put on website: benefits of membership, what we stand for, who we are. List networking opportunities
Action Item RA—2.3.3:	Award smaller contracts for specific jobs: Investigate granting small contracts to graduate students or undergrads for web design or communication pieces
Action Item RA—2.3.4:	Create 1-2 pager with specific expectations of board members regarding recruitment, donations, oversight of strategic plan action items, etc.
SUS GOAL 1	1. Implement effective and efficient organizational operations
Objective SUS—1.1:	Sustain good governance (through transitions and beyond)
Action Item SUS—1.1.1:	Create/update Policies and Procedures Manual
Action Item SUS—1.1.2:	Create/update a historical document of office holders and committees
Objective SUS—1.2:	Optimize effectiveness of membership participation
Action Item SUS—1.2.1:	Examine the feasibility of volunteer board/membership to successfully implement 2021-26 Strategic Plan

Action Item SUS—1.2.2:	Explore membership recruitment/palatability for more OBFS engagement
Objective SUS—1.3:	Ensure Organizational financial stability
Action Item SUS—1.3.1:	Assess financial requirements based on 2021 Strategic Plan
Action Item SUS—1.3.2:	Explore funding options, diversify through grants, membership dues and fundraising
SUS GOAL 2	2. Help support the sustainability of member stations
Objective SUS—2.1:	Provide manuals, templates and other resources related to operations and maintenance of Stations
Action Item SUS—2.1.1:	Make documents available to membership
Action Item SUS—2.1.2	Update/compile/archive user guides/best management practices
Action Item SUS—2.1.3	Generate items to provide Advocacy for FSML

