

# Organization of Biological Field Stations

Supporting environmental research, education, and public understanding

## Annual Report 2021

**2021 Elected Positions (Executive Committee)** (all terms are for 2 years and begin on April 1<sup>st</sup>. Only the Secretary and Treasurer may run for consecutive terms)

President	Chris Lorentz	2020-2022
Past President	Stacy McNulty	2020-2022
Vice President	Brett Biebuyck	2019-April 2021
Vice President	Lara Roketenetz	2021-2023
Secretary	Lesley Knoll	2020-2022
Treasurer	Paul Wetzel	2019-2024 (Rel)
At-Large (1)	Jason Wallace	2019-April 2021
At-Large (1)	Rhonda Struminger	2021-2023
At-Large (2)	Elizabeth Long	2020-2022
At-Large (EC)	Faustine Bernadac	2019-2021

**Board Selected Officer Positions** (terms are for 2 years, beginning on April 1<sup>st</sup>, and may be renewed)

Editor	Sarah Oktay	2020-2022
Network Coordinator	Jason Tallant	2020-2022

**Organizational Standing Committee Chairs.** The business of OBFS is conducted through committees. Committee Chairs are appointed by the Executive Committee for 1 year with terms beginning January 1<sup>st</sup> and may be renewed. Chairs assume seats on the Board of Directors.

Annual Meeting	Lara Roketenetz	2021-2021
Collaborations	Paul Foster	2021-2022
Human Diversity	Tori McDermott & Phoebe Jekielek	2021-2022
International	David Maneli & Rhonda Struminger	2021-2022
Finance & Investment	Philippe Cohen	2021-2022
Investment	Peter Connors	(ongoing)
Governance	Shane Waddell	2021-2022
Nominations	Stacy McNulty	2021-2022
Development	Brian Kloeppel & Sarah Oktay	2021-2022
Outreach	Lisa Busch	2021-2022
Communications	Vanessa Trujillo	2021-2022
Historian	Mary Hufty	2021-2022

The OBFS *Annual Report* contains results of elections, standing committee reports, minutes of the annual meeting, and other business of the organization. This report covers OBFS activities for January 1<sup>st</sup> -December 31<sup>st</sup> of 2021

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This edition, along with previous *Annual Reports*, is publicly available at [obfs.org](http://obfs.org). All inquiries should be addressed to [editor@obfs.org](mailto:editor@obfs.org).

## Editor's Note

I'll be stepping down as Editor in April of 2022 because my new job requires my full attention. The Board selected Stacy McNulty as the new Editor. Please contact [editor@obfs.org](mailto:editor@obfs.org) if you have any suggestions or questions. I'll see you at upcoming meetings and will remain Co-Chair of the Development committee.

So long, and thanks for all the fish!

-Sarah Oktay, OBFS Editor 2018-April 2022

## OBFS President's Report

Regarding the Board work in 2021, much of our efforts focused on finishing up the new [OBFS Strategic Plan \(2021-2026\)](#) which was officially released at the Annual Meeting in September. I would like to offer my appreciation and gratitude for all those who served on the team which comprised of five working groups: Advocacy, Collaborations, Diversity, Governance, and Member Support, and over 30 OBFS members. We are extremely thankful for everyone's hard work and are excited to move forward with the Implementation Phase which began in the Fall of 2021 with the creation of an ad-hoc website overhaul committee, the launch of the International Committee's matching program and other action items. By the end of the year, we finalized our Year 1 priorities and action items from the plan and assigned them to each relevant committee. (The Governance Committee will take the lead on measuring our progress and updating the plan accordingly.) The next steps will be to allocate and approve the necessary funds to implement the plan, some of which has already started. Overall, the success of the plan will require significant financial investments from internal and external sources. At this time, I would be remiss if I failed to acknowledge all those who run the annual auctions—our primary fundraiser, those who set up the investment funds initially, and those who have managed our financial resources so effectively to enable us to be in this position today.

We are extremely grateful for Tom Bansak, Associate Director, Flathead Lake Biological Station, for all his efforts towards making the virtual annual meeting a meaningful, productive, and worthwhile experience for all of us. With yet another pivot from a conventional face-to-face meeting to our second virtual meeting, Tom never blinked. Instead, he rolled up his sleeves and went to work on the logistics and other details to help ensure another successful meeting. And a special thanks to the entire Planning Committee, including Tom, Lara Roketenetz (Chair), Brett Biebuyck, Anne Kelly, Lesley Knoll, Art McKee, Stacy McNulty, Elizabeth Long, and Jason Wallace, all of whom displayed their dedication and hard work in organizing a rich and diverse slate of plenary speakers, concurrent sessions, and workshops throughout the meeting.

The meeting program reflected many of the priorities of the Organization and many aspects of the strategic plan. Topics of diversity, equity, and inclusion are at the forefront; featured in

several concurrent sessions, the International Station Forum, and in the plenary "The State of Diversity and Equity in Environmentalism," by August Ball. Collaborations are prominent, too. Beginning with the workshops and our partners at EDI, UFERN, and the Virtual Field, all of which provide opportunities to enhance our own programs and strengthen the mission of OBFS. Examples of research, education, and outreach showcase innovation and provide inspiration to all of us, particularly during these unique challenges. And best-management practices in conservation, fundraising, safety, and work-life balance will help provide all of us meaningful ways to survive and even thrive, as we persevere through the pandemic.

I want to acknowledge and thank everyone for their work in responding to the article on sexual assault and harassment at the Smithsonian Tropical Research Institute. In particular, I want to acknowledge the IDEA+ Committee Chairs (Phoebe Jekielek and Tori McDermott), along with Elizabeth Long and Anne Kelly, all of whom took the lead on our discussions and our official response: [OBFS Statement of Solidarity and Commitment](#). I also want to acknowledge Stacy McNulty for first bringing the article to the attention of the Board and for creating an opportunity for members to respond through this [Member Feedback](#) Form. Moving forward, it will be imperative that we address these issues openly and directly and follow through with the items outlined in the statement. I am confident that we have the expertise and willingness to do so, but additional external resources may be necessary to complement the Organization's efforts.

I would like to congratulate the new incoming members of the OBFS Board. The winners were:

- Lesley Knoll: President
- Beth Norman: Secretary
- Teresa Schueller: Member-at-Large 2
- Scott Thomas: Member-at-Large Early Career Rep

We are looking forward to working with them. They will officially start in April at which time we will acknowledge those individuals who will be cycling off the Board. I would like to thank all those who ran for the various openings, as well as Stacy McNulty and Sarah Oktay for securing the nominations

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and running the election. I would also like to propose a new Board Member Orientation sometime soon after the April Board meeting and consideration of a new date for the start of newly elected and newly appointed members.

Lastly, I want to thank all the Committee Chairs and Board-appointed members who have worked so diligently over the past year. I would like to acknowledge and thank Sarah Oktay for her many contributions and many positions with OBFS, as she passes the Editor baton to Stacy McNulty. While still producing the 2021 Annual Report and helping with the next newsletter, Sarah will remain active with OBFS and remain as

Co-Chair of the Development Committee, along with Brian Kloeppe.

This an exciting time for the Organization, and we are looking forward to launching many new initiatives. At the same time, we recognize that many members of our community face steep challenges stemming from the pandemic and other factors. The Board is committed to providing support, services, and relief throughout the upcoming year.

Dutifully submitted,  
Chris Lorentz, OBFS President 2020-2022

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## 2021 Elections

The 2021 election of officers who will serve in 2022 took place November 30 – December 31. Offices open were President, Secretary, Member-at-Large (2) and Member-at-Large Early Career.

**Lesley Knoll was elected President; Beth Norman was elected Secretary; Teresa Schueller was elected Member-at-Large (2), and Scott Thomas was elected Member-at Large (Early Career) in tight races that were nail biters for winners and losers alike.** OBFS greatly appreciates **Michael Flinn, Jonathan Frommeyer, Sheena Parsons, Andy Rappe, and Stefanie Whitmire** for their willingness to serve as Board members and stand for office! As a result of a new professional position for Lesley Knoll, she stepped down and Lara Roketenetz took her place as OBFS President with Tom Bansak appointed by the board as the VP (Next highest vote recipient in prior election).

### Year # of voters

2021	72
2020	85
2019	82
2018	83
2017	92
2016	100

### Year # of voters

2015	85
2014	99
2013	83
2012	83
2011	77

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## Meet your Elected Board of Directors for 2022



**Lara Roketenetz – OBFS President (term 2022-2024)** *Lara stepped in when Lesley had to step down due to her new position.*

I am the manager for the University of Akron Field Station (UAFS; 3 sites ~500 acres). I have a Master's in Biology and a Ph.D. in Integrated Bioscience and a graduate certificate in Nonprofit Management and Leadership. Although I wear many hats in my position (don't we all?!), my true passion is the community engagement program I've spearheaded to increase UA's involvement with local area K-12 schools. My role as President of OBFS is to preside at board meetings and run the annual meeting. I also oversee the functioning of board committees and in general, supervise the affairs of the organization. I can be reached at [president@OBFS.org](mailto:president@OBFS.org).



**Chris Lorentz – OBFS Past President (term 2020-2022)**

I am currently in my 28th year of teaching at Thomas More University, a small, liberal arts college in Northern Kentucky, where I also serve as Director of our Ohio River Biology Field Station. My primary role as Past President of OBFS is to oversee the nominations for officers and board members. The past president performs other duties assigned by the Board of Directors. I can be reached at [pastpresident@OBFS.org](mailto:pastpresident@OBFS.org).



**Tom Bansak – Vice President (term 2022-2023- finishing a term).**

I currently serve as Associate Director of the University of Montana's Flathead Lake Biological Station (FLBS). After completing my MS in aquatic ecology at FLBS, my role has evolved from research, to education, to outreach, to development, to helping run the place. I study rivers, lakes, ground water, salmonids and aquatic invasive species around Western North America using an ecosystem approach. I have also designed, installed, and maintained environmental sensor networks. I fill in for the President when the President is unable to attend a meeting or event. My duties also include overseeing the planning of the annual meeting and conducting member surveys. I can be reached at [vicepresident@OBFS.org](mailto:vicepresident@OBFS.org).



**Beth Norman – Secretary (term 2022-2024)**

I am the Director of Science and Research at Lacawac Sanctuary, an independent 550-acre field station in the Pocono Mountains of Pennsylvania. I have an MS and PhD in Biological Science from James Madison University and Virginia Tech, respectively. I am an aquatic ecosystem ecologist and have spent most of my career studying nutrient cycling in lakes, streams, and water-filled tree holes (prime mosquito habitat!). I am responsible for taking the minutes during the annual meetings and for all Board of Directors conference call meetings. I am custodian of the corporate records and keep a register of the mailing address of each voting member as provided by such member. I can be reached at [secretary@OBFS.org](mailto:secretary@OBFS.org).



**Paul Wetzel – OBFS Treasurer (term 2021-2023; can be extended)**

My academic training is in environmental policy and wetland ecology [BS from University of Michigan; double major in political science and botany; MS in Environmental Science from the School of Public & Environmental Affairs at Indiana University; Ph.D. in Ecology & Evolutionary Biology from Iowa State University]. I am the Manager of the Ada & Archibald MacLeish Field Station, a liberal arts field station run by Smith College in western Massachusetts. I am responsible for the financial affairs of the corporation and coordinate with the secretary to prepare a register of current voting and non-voting members. I also am the primary contact related to renewing or joining OBFS. I can be reached at [treasurer@OBFS.org](mailto:treasurer@OBFS.org).



**Rhonda Struminger – OBFS Member-at-Large (1) (term 2021-2023)**

I received my Ph.D. in Political Science with a focus on Comparative and American Politics from Texas A&M University in 2013 and my Ed.M. with a focus on Technology in Education from Harvard University. In 2005 I co-founded a biological field station, CICHAZ ([www.cichaz.org](http://www.cichaz.org)), in a fragment of mesic rainforest in the Sierra Madre Oriental of Mexico (near Calnali, Hidalgo Mexico). I am currently the Co-Director of CICHAZ and a Visiting Researcher with the Università degli Studi di Padova (University of Padova). I am responsible for duties as defined by the Board or Directors. I can be reached at [rhonda@cichaz.org](mailto:rhonda@cichaz.org).





**Teresa Schuller – OBFS Member-at-Large (2) (term 2022-2024)**

I am currently the director (and only employee) of the University of Wisconsin-Milwaukee at Waukesha Field Station, which is part of a 2-yr liberal arts college within a larger R1 institution. I have a PhD in Zoology and Entomology, focusing on the behavior of social insects. I am responsible for duties as defined by the Board or Directors. I can be reached at [schuelle@uwm.edu](mailto:schuelle@uwm.edu).



**Scott Thomas – OBFS Early Career Member-at-Large (term 2022-2024)**

I am currently a National Science Foundation postdoctoral fellow hosted by Murray State University. I received my B.S. in biology from the University of Mount Union in 2011 and did my graduate work on amphibian population ecology at the University of Akron, earning my M.S. in biology in 2013 and my Ph.D. in Integrated Bioscience in 2020. I am responsible for duties as defined by the Board or Directors. I can be reached at [scott06thomas@gmail.com](mailto:scott06thomas@gmail.com).

## COMMITTEE REPORTS

### Annual Meeting Committee - Lara Roketenetz

The 2021 Annual Meeting Committee consisted of Lara Roketenetz (OBFS VP) Brett Biebuyck (Past OBFS VP), Tom Bansak (Flathead Lake Biological Station/FLBS, 2020 and 2021 meeting host), Chris Lorentz (OBFS President), Stacy McNulty (OBFS Past President), Lesley Knoll (OBFS Secretary), Art McKee (FLBS), Jason Wallace (Past OBFS Member at Large), Anne Kelly, and Elizabeth Long (OBFS Member at Large). The committee met throughout the year with increased frequency in the months leading up to the 2021 Annual meeting. Our original plan to host the 2021 annual meeting in person at FLBS was thwarted once again by an increase in COVID-19 cases nationwide due to the Delta variant. The hard decision to move the conference to fully online for the second year in a row was not taken lightly by the committee but we all think the preemptive move to keep our members safe was a wise one.

FLBS was the first station to host two consecutive OBFS annual meetings, and even though they both turned out to be fully virtual, we thank them profusely for their hard work and hospitality over the last two years in keeping our community connected through successful and inspiring annual meetings.

The meeting was held September 20-27, with Tuesday the 21<sup>st</sup> and Wednesday, the 22<sup>nd</sup> consisting of three pre-meeting workshops on the important topics of The Virtual Field, UFERN, and Environmental Data Initiative. The main meeting hosted fantastic plenary speakers such as Jim Elser of FLBS, who talked about phosphorus and field stations; August Ball of Cream City Consulting who gave an informative and inspiring talk on “The State of Diversity and Equity in Environmentalism;” and Peter McCartney of the NSF who told us about updates to the Field Station and Marine Labs NSF program.

The meeting hosted nine concurrent sessions with overarching themes of DEI, Education, and Field Station Operations, held in three blocks; OBFS business and board meetings; social events, award presentations; lightning talks, and the famous OBFS auction. Notable awardees were Art McKee with the Distinguished Service Award, and Lysbeth Anderson Working and John Working for the Local Hero Award. We also hosted an International Forum which was an important community building portion of the meeting, and especially noteworthy since we had attendees from over a dozen countries in attendance. We also spent time sharing our new 5-year Strategic Plan with the OBFS community. The plan

focuses on the [OBFS Strategic Goals](#) of Collaborations; IDEA+; Membership; Raising Awareness; and Sustainability and is an important guiding document for our growth as an organization. The quick pivot to a virtual meeting was once again seen as a huge success given the circumstances. A post meeting survey bore out these sentiments, with a lot of appreciation expressed for the meeting hosts and planners. The meeting had 163 registrants.

The upcoming meeting will be at Central Michigan Biological Station on Beaver Island from September 12-17, 2022. We are still waiting with anticipation to find a host site for 2023 through 2025. If your station is interested, please fill out the form at: <https://forms.gle/ASjYxTLh1Vb69N8L8>.

### **Collaborations Committee – Paul Foster, Chair**

The OBFS Board voted to create the new Collaborations Committee at its meeting in November 2021. Collaborations both between OBFS and other organizations (e.g. NAML, AIBS, UFERN, The Virtual Field Project) as well as within OBFS partnerships have been identified as one of the five priority areas of the new strategic plan. Brian Kloeppel, Andy Rappe, Art McKee, and I, with input from Anne Kelly and others, formulated the collaborations section of the Strategic Plan.

#### **The responsibilities of the new Collaboration Committee include:**

- a) Recruit liaisons to the different organizations identified in the Strategic plan: ESA-SEEDS; NAML; AIBS; UFERN; The Virtual Field Project; US Federal Land management agencies, NGOS and tribes; and an international organization identified by the International Committee. These liaisons would serve as ambassadors from OBFS and provide a conduit for the exchange of information, advocacy for OBFS, and representation when needed. The committee would be charged with defining the roles of the liaison and developing effective communication strategies with the OBFS community.
- b) Establish a station-station exchange program pending funding. These are opportunities organized around a particular theme that meets at a field station for 2-3 days. The award would cover up to \$1000 for travel costs. The committee would be responsible for advertising the program and evaluating the applications.
- c) Work with the Outreach and Communications, IDEA+, and International Committees to develop an effective strategy for exchanging information across the different OBFS platforms (listserv, Facebook, Instagram, newsletter, webpage, Twitter). The committee would also recruit volunteers to communicate sources of information from organizations and resources that don't have formal liaisons. A focus will also include professional development opportunities for OBFS members.
- d) Work with the Member Support and Services Committee to assess which collaborations are important to the OBFS membership and how best to communicate information about them.
- e) Recruit a volunteer to establish a framework for supporting and promoting collaborations around conservation efforts.

### **Activities for 2022**

- a) Recruit committee members and liaisons to the following organizations US National Science Foundation (NSF), National Association of Marine Labs (NAML), Undergraduate Field Experiences Research Network (UFERN), US Federal land management organizations, tribes, and NGOs, the Virtual Field Project, and the Ecological Society of America SEEDS Project.

b) Implement station exchanges. The 2022 OBFS budget includes \$5000 for station-to-station professional development exchanges. We are developing the process for stations to apply for an award --typically to cover the travel costs of the participant(s) for short term (2-3 days) visits focusing on a particular theme. Applications details for the program will be announced in mid-summer 2022.

c) Conduct a membership survey. A critical part of implementing the strategic plan is collecting the baseline data on who makes up the current OBFS membership and what priorities they have for implementing the strategic plan. The survey should be sent out to the membership in September 2022 in association with the annual meeting. The Collaborations Committee is contracting a consultant to conduct and compile the results of the survey.

d) Continue publishing notices from various collaborators via the OBFS listserv and quarterly newsletter.

e) Explore a framework for supporting and promoting collaborations around conservation efforts.

### **AIBS Liaison**

Paul Foster

OBFS continues to maintain a strong relationship through its membership in the American Institute of Biological Sciences (AIBS). In 2021 OBFS collaborated with Jyotsna Pandey, AIBS Public Policy Director to monitor the progress of the National Science Foundation (NSF) reauthorization legislation in the US Congress. In June 2021, OBFS President Chris Lorentz and OBFS Representative to AIBS Paul Foster met with several AIBS board members and Diane Bosnjak, AIBS Membership Manager and Technology Liaison to discuss the relationship between OBFS and AIBS. Chris and Paul highlighted the benefit OBFS members receive from AIBS including its annual Congressional Visits Day, communication boot camps, public policy updates, newsletters, and annual council meetings.

In 2021 OBFS endorsed two policy initiatives organized by AIBS. They included support for the NSF reauthorization bill known as the National Science Foundation for the Future Act<sup>1</sup>. The second effort was a collaboration with the Climate Science Working Group in the form of a letter to members of the US Congress urging action on climate change<sup>2</sup>.

In 2021 both Congressional Visits Day and the annual Council Meeting were held virtually. The Council meeting was expanded into a two-day workshop entitled Enabling Scientific Societies to Support Inclusive, Diverse, Equitable, and Accepting (IDEA) Scientific Environments. OBFS IDEA+ Committee Co-chairs Tori McDermott and Phoebe Jekielek attended the workshop. At our request, in late December AIBS published in its daily newsletter the OBFS Statement in response to the history of sexual assault and abuse at the STRI field station on Barro Colorado Island.

### **Activities for 2022**

The Congressional Visits Day (CVD) will remain virtual due to reluctance by Capitol Hill staffers to hold in-person meetings. A communications boot camp will also be held just after the CVD in April. OBFS is sponsoring seven OBFS member station representatives to attend the boot camp. They will prepare materials to share with the rest of the membership at the annual meeting and through the newsletter.

OBFS will continue to share relevant news stories and information disseminated by AIBS through the OBFS listserv and newsletter. We will also consider endorsing policy positions brought to our attention by AIBS and expect to attend the 2022 Council Meeting.

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<sup>1</sup> <https://science.house.gov/bills/the-national-science-foundation-for-the-future-act>

<sup>2</sup> <https://www.aibs.org/assets/collections/news/climateletter-2021.pdf>

## Ad-hoc Awareness Efforts

Several OBFS members were involved in two ad-hoc awareness efforts in 2021. The first effort, spearheaded by Dave Wagner and Kelly Swing aimed to bring attention to the dire circumstances facing field stations in the wake of the pandemic. Biweekly meetings resulted in two publications: Swing et al. 2021 published in *BioScience* and Likens and Wagner 2021 published in *Science* (see the list of Publications for complete citations). The second ad-hoc effort focused on the reauthorization of the US National Science Foundation (NSF). A process that happens every five years, the congressional reauthorization is an opportunity to establish priorities within NSF. OBFS President, Chris Lorentz and former OBFS Presidents Sarah Oktay and Ian Billick worked with Joe Bischoff, Principal, Government Affairs at Cornerstone Consulting and AIBS Public Policy Director Jyotsna Pandey to include language in the legislation highlighting the importance of field stations. This was the first time an NSF reauthorization bill explicitly included language supporting field stations. The bill states that "[t]he Director shall continue to support enhancing, repairing, and maintaining research instrumentation, laboratories, telecommunications and housing at biological field stations and marine laboratories."

## 2022 Activities

We are exploring an additional publication focusing on tropical field stations, their circumstances, and issues. An important component is recruiting a broad representation of co-authors from tropical countries. In addition, it became clear during awareness-raising efforts that advocacy for field stations needs a consistent, long-term approach. Various initiatives are underway within OBFS to maintain a sustained effort directed at policy makers, funding agencies, private and foundation donors, friends, and other stakeholders. These include one-pagers and other information materials.

## 2021 Publications of Potential Interest

- Cacapit, A., N. Jackson, P. Lang, B. Stoner-Osborne, P. V. Geraldino, and V. Sloan. 2021. What worked for us? Student experiences with geoscience summer research internships during both COVID-19 and heightened racist violence. *Bulletin of the American Meteorological Society* June 2021: 491-493.
- Cronin, M. R., S. H. Alonzo, S. K. Adamczak, D. N. Baker, R. S. Beltran, A. L. Borker, A. B. Favilla, R. Gatins, L. C. Goetz, N. Hack, J. G. Harenčár, E. A. Howard, M. C. Kustra, R. Maguiña, L. Martinez-Estevez, R. S. Mehta, I. M. Parker, K. Reid, M. B. Roberts, S. B. Shirazi, T.-A. M. Tatom-Naecker, K. M. Voss, E. Willis-Norton, B. Vadakan, A. M. Valenzuela-Toro, and E. S. Zavaleta. 2021. Anti-racist interventions to transform ecology, evolution, and conservation biology departments. *Nature Ecology & Evolution* 5: 1213–1223. <https://doi.org/10.1038/s41559-021-01522-z>
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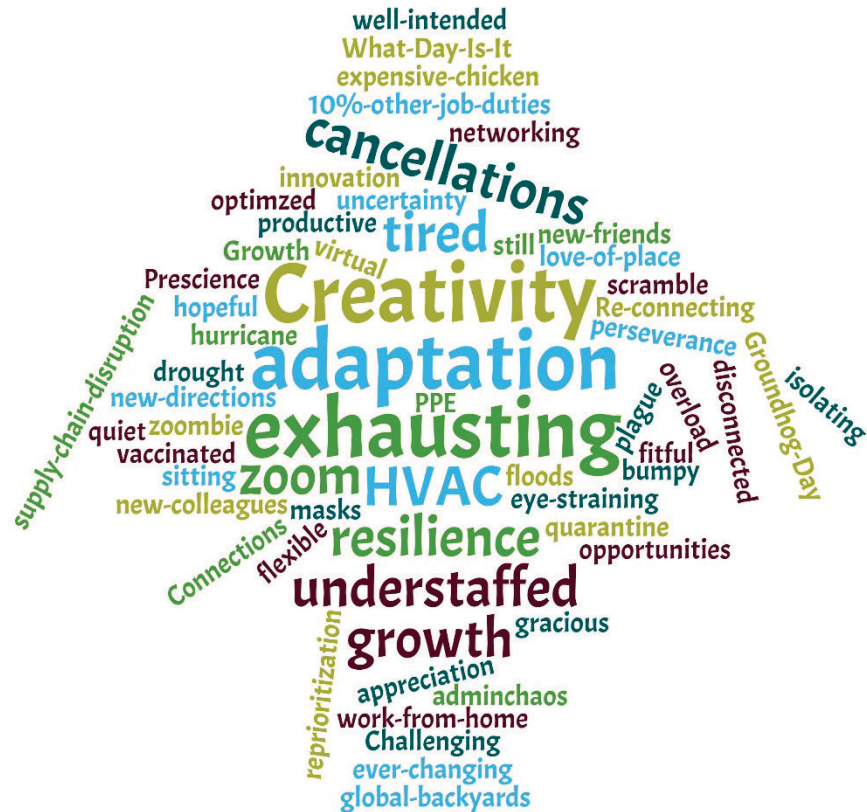
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- National Academies of Sciences, Engineering, and Medicine. 2021. Next Generation Earth Systems Science at the National Science Foundation. The National Academies Press, Washington, D.C. <https://doi.org/10.17226/26042>.
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## Development Committee report – Brian Kloeppel and Sarah Oktay, Co-Chairs

The OBFS Development Committee met monthly via zoom in 2021 and worked on three primary items. First, the team of Brian Kloeppel, Sarah Oktay, Paul Foster, and Elizabeth Long led an OBFS annual meeting 'Friend and Fund Raising at Biological Field Stations' virtual presentation and discussion to assist other field stations to promote and lead their development activities. Second, Sarah Oktay and Breezy Jackson developed and conducted a survey of OBFS members and collected 42 responses. They compiled the survey results and will post them online. Third, the Development Committee is planning a small friend-raising and fundraising boat trip event in Traverse City, Michigan on 17 September 2022 following the OBFS annual meeting at Central Michigan University Biological Station on Beaver Island. The committee members are recruiting 25 regional attendees who will join a small group of OBFS members to teach and train other field station leaders to develop and lead their own friend and fundraising events.

## Historian's Report – Mary Page Hufty

Mary is the keeper and repository of OBFS History and photos, please send any reports or photos or other items of interest to [her](#). At the annual meeting, Mary arranges for a word cloud to be created with words provided by attendees. Here is the 2021 word cloud:



## International Committee Report – David Maneli and Rhonda Struminger, Co-Chairs

Committee members: Natalie Beenaerts, Regis Supper, Paul Wetzels, Gabriela María Vázquez Adame, Tomi Sugahara, Martin Duval, Jennifer Gee, Jim Denuyl, Kelly Swing, Stacy McNulty, Paul Foster, Donovan Tye, Kim King

### *Introduction*

In 2021 the OBFS International Committee (IC) presented a proposal to the OBFS Board to broaden its scope and proposed several new initiatives. The proposal was accepted and the role of the OBFS IC is now to serve as the voice for international field stations (IFSs: Stations located outside of the United States of America) by keeping the OBFS board and the U.S. field station community informed of IFSs' circumstances, needs, interests and ways they can contribute to fulfilling OBFS's mission. The International Committee offers IFSs the opportunity to increase the effectiveness of their research, outreach, and education initiatives by promoting collaboration, networking, best practices, and communication among field stations wherever they are located.

To achieve these goals, the OBFS IC changed its structure so there will be co-directors moving forward with the long-term vision of regional leaders representing all the major territories of the world.

David Maneli and Rhonda Struminger are the current co-chairs.

### *2021 activities:*

1. In lieu of travel awards to the annual meeting and conference, the OBFS IC was able to provide three participants with free online access to the meeting
2. Hosted the first International Committee Forum during the annual meeting featuring real-time Spanish translation (a first for an OBFS event!)
3. Contributed to the OBFS strategic plan
4. Launched the OBFS IC Matching Program in the fall of and promoted it through the OBFS newsletter, at the meeting forum, and through the OBFS listserv
5. Compiled a list of international field stations that will continue to be updated
6. Created a list of available translators for OBFS events to provide translation options for participants at OBFS events moving forward
7. Created a reference list of possible funding opportunities for international stations
8. Announced the creation of a virtual Social Cafe that will feature an international station in May and November 2022

### *2022 Plans:*

- Implement the OBFS IC Matching Program with 4 groups of 3 field stations; The IC will support each group's efforts to develop their collaboration and these efforts will be shared with the OBFS community during the 2022 OBFS Meeting and Conference
- Establish international travel award criteria
- Maintain lists of translators and funding opportunities
- Host at least two Virtual Social Cafes

## **Governance Committee Report – Shane Waddell**

In 2021, the Governance Committee worked with the Strategic Planning working-group to establish goals and actions to be implemented within its purview. The Governance committee will be responsible for the Priority Area of Sustainability. The goals for OBFS Sustainability are to implement effective and efficient organizational operations and to help support the sustainability of member stations.

In order to implement effective and efficient organizational operations, the Governance Committee is updating Policies and Procedures for the Board and Committees. This will be a guideline for operations and serve as the primary tool for onboarding new Board Officers and Committee Chairs through transitions. A working plan will be implemented in 2022.

Supporting the sustainability of member stations will be accomplished in partnership with other Committees focused on the additional Priority Areas.

## **IDEA+ committee (Inclusion, Diversity, Equity and Accessibility)**

### **Introduction**

In 2021 the OBFS IDEA+ committee, formerly the Diversity Committee, continued to work to implement and meet the goals set forth by the strategic plan.

Phoebe Jekielek and Tori McDermott are the current Co-Chairs.

### *2021 activities:*

## OBFS ANNUAL REPORT 2021

1. Sponsored August Ball presentation at OBFS annual meeting for DEIJ session
2. Contributed to the OBFS strategic plan
3. Recruited new members
4. Revised the committee name from the Diversity Committee to the IDEA+ Committee
5. Revised the name of the Human Diversity Award to the Advancing Equity Award
6. Developed [OBFS Statement of Solidarity and Commitment](#)

### 2022 plans:

1. Continue working to implement and meet strategic plan goals
2. Collect baseline data on field station personnel and users
3. Review OBFS materials (policies, outreach, marketing, and communications, etc.) for inclusive language and practices with input from a diverse group including individuals from underrepresented groups
4. Start a running DEIJ resource list for OBFS members
5. Develop OBFS statement on DEIJ and revisit and address commitments from recent [Statement of Solidarity](#)
6. Present workshop on DEIJ at annual meeting

### Human Diversity Award – 2021

The Human Diversity Award Committee reviewed the applications for the 2021 award and awarded two Human Diversity awards and one honorable mention. The two winning stations were: Jasper Ridge Biological Preserve (California) and Skukuza Science Leadership Initiative (SSLI, South Africa). They acknowledged Pepperwood Preserve with an honorable mention. All three station programs were presented at the annual meeting and can be viewed at <https://youtu.be/F2mAyHIQnpl>.

### Call for submissions: 2022: *Advancing Equity in Field Science* 2022 Advancing Equity Award

#### Supporting Material Deadline: July 17, 2022

The OBFS Advancing Equity Award (formerly known as the Human Diversity Award) provides recognition for unique activities, programs, or approaches (funded or unfunded) that increases the involvement, engagement, and sustainability of underrepresented groups in field science. Broadly speaking, underrepresented groups in field science may include, but are not limited to, ethnic minorities (African Americans, Hispanics, Asians, Native Americans, and others), women, first-generation college students, inner-city youth, disadvantaged rural communities, K-12 groups, tribal colleges, community colleges, undergraduate institutions with small programs, and citizen monitoring programs.

Advancing Equity may be accomplished by disseminating materials and using, rearranging, or creating infrastructure to facilitate and stimulate both applied and individualized approaches to experiential scientific learning. We will also recognize stations that demonstrate how retention and application of new scientific concepts are promoted to facilitate further discovery and increase scientific dialogue among diverse user groups. This may include a pedagogy for the basic knowledge needed by underrepresented groups to address the current challenges in environmental and natural resources management and research at all educational levels (K-12, undergraduate, graduate, and continuing education).

In addition to the honor and recognition of peers, the OBFS Advancing Equity Award includes a permanent plaque for the winning station; an official award letter that can be included in the official materials, grant applications of the winning station; a second traveling OBFS plaque that will record previous winners and be housed at the most recent recipient's facility; and recognition on the OBFS website. The award may include a travel reimbursement of up to \$1000 for the awardee to attend the annual OBFS meeting if travel funds are limiting for the winning institution. We acknowledge that COVID-19 may impact people's ability to travel and can reallocate travel funds for the 2023 OBFS



meeting if the winning institution is unable to attend the 2022 OBFS conference in person. The willing institution will be recognized at the 2022 OBFS conference.

**Timing of Submission, Review and Award**

February	A request for nominations for the award will be announced on the OBFS website and through the OBFS list server. Nomination of institutions by others as well as institutional self-nominations will be accepted.
<b>July 17</b>	<b>Supporting material due.</b>
Early September	OBFS IDEA+ Committee announces recipient as determined by members of the OBFS Advancing Equity Award Committee who are not from organizations with current applications and approved by the OBFS Board.
September	Award will be presented at the OBFS Annual Meeting. The OBFS Historian will photograph the representative(s) from the field station receiving the award at the 2022 Annual Meeting. <b>Send nominations and support material to Victoria McDermott (<a href="mailto:diversity@obfs.org">diversity@obfs.org</a>).</b>

Forgot your microscope? To see a larger version of this amazing photo that Philippe Cohen painstakingly developed from dozens of screen shots at the OBFS 2021 meeting, visit [this link](#).

**ATTENDEES AT THE 2021 OBFS MEETING – Virtual meeting hosted by Flathead Lake Biological Station**

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## Attendees 2021 Virtual meeting (OBFS Board Members are in Bold)

First Name	Last Name	Organization	Department/Role
Joy	Baccei	University of California - Natural Reserve System	Merced Vernal Pools and Grassland Reserve
Tom	Bansak	University of Montana	Flathead Lake Biological Station
Anthony	Barnosky	Stanford University	Jasper Ridge Biological Preserve
Michael	Benedict	Hiram College	Environmental Studies Department
Joshua	Benes	At large	
<b>Brett</b>	<b>Biebuyck</b>	<b>Rocky Mountain Biological Laboratory</b>	<b>Administration</b>
Lori	Biederman	Iowa State University	Ecology, Evolution, and Organismal Biology
Mariana	Bonfim	Temple University	Ambler Field Station
Russell	Bradley	California State University Channel Islands	Santa Rosa Island Research Station
Elizabeth	Braker	Organization for Tropical Studies	Administration
Ian	Breckheimer	Rocky Mountain Biological Laboratory	Spatial Ecology

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Kevin	Browne	University of California - Natural Reserve System	Natural Reserve System
Lisa	Busch	Sitka Sound Science Center	Administration
Alan	Byboth	Texas State University System	Christmas Mountains Field Station
Sarah	Carroll	Michigan State University	Kellogg Biological Station
Jeffrey	Clary	University of California Davis	Natural Reserve System
Philippe S	Cohen	Stanford University	Jasper Ridge Biological Preserve - retired
Peter	Connors	University of California Davis	Bodega Marine Lab - retired
Aspen	Coty	California State University Channel Islands	Santa Rosa Island Research Station
Aldo	de la Mora	University of California Riverside	James San Jacinto Mountains and Oasis de los Osos Reserves
Jerald	Dosch	Macalester College	Ordway Field Station
Martha	Downs	Long-Term Ecological Research Network	Network Office
Melissa	Duhaime	University of Michigan	Ecology and Evolutionary Biology
Haley	Dunleavy	University of Alaska Fairbanks	Toolik Field Station
Richard	Durtsche	Northern Kentucky University	Research and Education Field Station
Martin	Duval	McGill University	Gault Nature Reserve
Matthew	Dykstra	Pierce Cedar Creek Institute	Education
James	Elser	University of Montana	Flathead Lake Biological Station
Alicia	Farmer	University of Michigan	Biological Station
Nicholas	Fisichelli	Schoodic Institute at Acadia National Park	Administration
Michael	Flinn	Murray State University	Hancock Biological Station
Susan	Flowers	Washington University in St. Louis	Tyson Research Center
Paul	Foster	Bijagual Ecological Reserve	Administration
Zachary	Fox	Hiram College	Biology
Cristina	Francois	National Audubon Society	Appleton-Whittell Research Ranch
Jon	Garbisch	University of Nebraska Lincoln	Cedar Point Biological Station - School of Biological Sciences
Jennifer	Gee	University of California Riverside	James San Jacinto Mountains Reserve, UC Natural Reserve System
John	Gordon	Central Michigan University	Biological Station, Science and Engineering
Ismael	Guido	Universidad de Costa Rica	Biology - Sede de Occidente
Lyle	Guyon	Lewis and Clark Community College	National Great Rivers Center
Helen	Habicht	University of Michigan	Biological Station
Laura	Hainsworth	Emory & Henry College	Bartlett-Crowe Field Station
Mike	Hamilton	University of California Berkeley	Natural Reserve System- retired
Zac	Harlow	University of California Berkeley	Blue Oak Ranch Reserve
Kristen	Haynes	State University of New York Oswego	Rice Creek Field Station
Trevor	Hebert	Stanford University	Jasper Ridge Biological Preserve
Morgan	Heim	The Virtual Field	Consultant/Freelancer

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Steven	Hick	University of Denver	Geography & the Environment
Marge	Holland	University of Mississippi	Field Station
R. Justin	Hougham	University of Wisconsin Madison	Division of Extension
Mary	Hufty	Archbold Biological Station	Board of Directors
Breeanne	Jackson	University of California Merced	Yosemite and Sequoia Field Stations
<b>Phoebe</b>	<b>Jekielek</b>	<b>Hurricane Island Foundation</b>	<b>Research</b>
Cora	Johnston	University of Virginia	Coastal Research Center, Environmental Sciences
Sara	Kassis	Sonoma State University	Engineering
Rebecca	Kauten	Iowa Lakeside Laboratory	Scientist in Residence
Isabelle	Kay	University of California San Diego	Natural Reserve System
Brian	Keas	Au Sable Institute of Environmental Studies	College Programs
Anne	Kelly	California State University Fullerton	Desert Studies Center
<b>Brian</b>	<b>Kloeppel</b>	<b>Western Carolina University</b>	<b>Graduate School and Research</b>
<b>Lesley</b>	<b>Knoll</b>	<b>University of Minnesota</b>	<b>Itasca Biological Station</b>
Nancy	Lane	Bellevue College	Earth & Space/Life Sciences
Lyndal	Laughrin	University of California Santa Barbara	Santa Cruz Island Reserve, Natural Reserve System
Michelle	Lawing	Texas A&M University	Ecology and Conservation Biology
Ted	Lawrence	African Center for Aquatic Research and Education	Secretariat
Robin	Le Breton	Iracambi Atlantic Rainforest Research & Conservation Center	Research
Kurt	Leuschner	College of the Desert	Natural Resources
Angela	Levins	Dauphin Island Sea Lab	Public Relations
<b>Elizabeth</b>	<b>Long</b>	<b>At large</b>	
<b>Chris</b>	<b>Lorentz</b>	<b>Thomas More University</b>	<b>Biology Field Station, Biological Sciences</b>
Lela	Love	Archbold Biological Station	Board of Directors
Nancy	Lowe	Brighter Impacts	
Claudia	Luke	Sonoma State University	Center for Environmental Inquiry
David	Maneli	McGill University	Gault Nature Reserve
James	March	Washington & Jefferson College	Biology
Dexter	Mardis	Wichita State University	Biological Field Station, Biological Sciences
Peter	McCartney	National Science Foundation	Biological Infrastructure
Deedra	McClearn	Organization for Tropical Studies	
<b>Victoria</b>	<b>McDermott</b>	<b>University of Maryland</b>	<b>Communication</b>
Terry	McGlynn	California State University Fullerton	Desert Studies Center
Arthur	McKee	University of Montana	Flathead Lake Biological Station
<b>Stacy</b>	<b>McNulty</b>	<b>State University of New York - Environmental Science and Forestry</b>	<b>Adirondack Ecological Center</b>
Kim	Medley	Washington University in St. Louis	Tyson Research Center
Nia	Morales	University of Florida	Wildlife Ecology and Conservation



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Megan	Napoli	Mohonk Preserve	Conservation Science
Karina	Nielsen	San Francisco State University	Estuary & Ocean Science Center
Beth	Norman	Lacawac Sanctuary Biological Field Station and Environmental Education Center	Science and Research
Kari	O'Connell	Oregon State University	STEM Research Center
Evans	Odula	Rusinga Island Biological Field Station	Forestry Director
<b>Sarah</b>	<b>Oktay</b>	<b>University of California Davis</b>	<b>Natural Reserve System</b>
Sheena	Parsons	University of Kansas	Field Station, Kansas Biological Survey
Angelica	Patterson	Black Rock Forest	Education
Ryan	Petterson	Stanford University	School of Earth, Energy, and Environmental Science
Caitlin	Potter	University of Minnesota	Cedar Creek Ecosystem Science Reserve
Hugo	Quintero	Eco-Alianza de Loreto	Centro de Estudios del Medio Ambiente (CEMA)
Danielle	Racke	University of Lynchburg	Claytor Nature Center, School of Sciences
Jorge	Ramos	Stanford University	Jasper Ridge Biological Preserve
Andrew	Rappe	University of Florida	Ordway-Swisher Biological Station
Laura	Reed	Archbold Biological Station	Administration
Corinne	Richards-Zawacki	University of Pittsburgh	Pymatuning Lab of Ecology
Stephen	Richter	Eastern Kentucky University	Division of Natural Areas
Amanda	Robin	University of California Los Angeles	Ecology and Evolutionary Biology
Ama	Rogan	Tulane University	ByWater Biological Field Station / A Studio in the Woods
<b>Lara</b>	<b>Roketenetz</b>	<b>University of Akron</b>	<b>Biology</b>
Patricia	Saunders	Ashland University	Biology & Environmental Science Program
Jonathan	Schilling	University of Minnesota	Itasca Biological Station
Jeanette	Schnars	Regional Science Consortium	
Adam	Schubel	University of Michigan	Biological Station
Teresa	Schueller	University of Wisconsin Milwaukee	Waukesha Field Station, Math and Natural Sciences
William	Schuster	Black Rock Forest	Administration
Henry	Schwendler	Hiram College	Biological Field Station
Vivienne	Sclater	Archbold Biological Station	GIS and Data Management
Jennifer	Seavey	Shoal Marine Laboratory	Administration
Rachel	Short	Texas A&M University	Ecology and Conservation Biology
Karie	Slavik	University of Michigan	Biological Station
Julia	Solomon	Mohonk Preserve	Conservation Programs
Michael	Stevens	Utah Valley University	Capitol Reef Field Station
<b>Rhonda</b>	<b>Struminger</b>	<b>CICHAZ and Texas A&amp;M University</b>	<b>Ecology and Conservation Biology</b>
Maura	Sullivan	Finger Lakes Community College	Conservation
Hilary	Swain	Archbold Biological Station	Administration
Sara	Syswerda	Pierce Cedar Creek Institute	Education
<b>Jason</b>	<b>Tallant</b>	<b>University of Michigan</b>	<b>Biological Station</b>

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Scott	Taylor	University of Colorado Boulder	Ecology and Evolutionary Biology
Chris	Tracy	University of California Riverside	Boyd Deep Canyon Desert Research Center
Vanessa	Trujillo	Fruit & Spice Park	Conservation & Research
Donovan	Tye	Organization for Tropical Studies	Education, Operations
Skip	Van Bloem	Clemson University	Baruch Institute
John	Van Niel	Finger Lakes Community College	Environmental Conservation
Kristin	Vanderbilt	Florida International University	Environmental Data Initiative, Department of Biology
<b>Shane</b>	<b>Waddell</b>	<b>University of California Davis - Natural Reserve System</b>	<b>Quail Ridge Reserve</b>
Jason	Wallace	California State University Fullerton	Desert Studies Center, College of Natural and Behavioral Sciences
Hannah	Webber	Schoodic Institute	Science and Education
<b>Paul</b>	<b>Wetzel</b>	<b>Smith College</b>	<b>Center for the Environment, Ecological Design and Sustainability</b>
Stefanie	Whitmire	Clemson University	Baruch Institute
Joseph	Whittaker	Concordia College	Long Lake Field Station; Biology, Environmental and Sustainability Studies
Kerry	Winger	Sonoma State University	Center for Environmental Inquiry
Ian	Withrow	University of Montana	Flathead Lake Biological Station
Jill	Zarestky	Colorado State University	School of Education
Virginia	Zaunbrecher	University of California Los Angeles	Congo Basin Institute

### Minutes from the Annual Meeting



#### MINUTES - OBFS Board of Directors and Business Meetings

Board of Directors Meeting I - September 20, 2021

Board of Directors Business Meeting – September 23, 2021

Board of Directors Meeting II - September 27, 2021

**NOTE: ALL Annual MEETING ZOOM recordings can be found at**

**<https://www.youtube.com/playlist?list=PLoLXz1ikyS0J2cj5awiy48NS0ydD7nbwF>**

### Board of Directors Meeting I - September 20, 2021

**Board Members Attending 9/20:** Lesley Knoll, Chris Lorentz, Shane Waddell, Paul Wetzel, Sarah Oktay, Elizabeth Long, Brian Kloeppel, Stacy McNulty, Phoebe Jekielek, Rhonda Struminger, Lara Roketenetz, Jason Tallant, David Maneli, Faustine Bernadac, Mary Hufty

**Board Members Absent 9/20:** Lisa Busch, Vanessa Trujillo, Tori McDermott

**Guests Attending 9/20:** Philippe Cohen, Tom Bansak, Jen Gee, Brett Biebuyck, Skip Van Bloem, Kim King, Kurt Leuschner, Ismael Guido, Paul Foster (invited guest for AIBS rep)

Call meeting to order (9/20) – Chris Lorentz at 1:32 PM Central time

### **Old Business**

- Approval of meeting minutes, June 2021 – Lesley Knoll. Motion to approve from Paul Wetzel. Brian K. seconds. Motion passes unanimously.
- Review of June Action Items – Lesley

### **President, Vice President, Secretary, Treasurer and Committee Reports**

#### **President's Report – Chris Lorentz**

- We are extremely grateful for Tom Bansak, Associate Director, FLBS, for all his efforts towards making this virtual meeting a meaningful, productive, and worthwhile experience for all of us. With yet another pivot from a conventional face-to-face meeting to our second virtual meeting, Tom never blinked. Instead, he rolled up his sleeves and went to work on the logistics and other details to help ensure another successful meeting. And a special thanks to the entire Planning Committee, including Tom, Lara Roketenetz (Chair), Brett Biebuyck, Anne Kelly, Lesley Knoll, Art McKee, Stacy McNulty, and Jason Wallace, all of whom displayed their dedication and hard work in organizing a rich and diverse slate of plenary speakers, concurrent sessions, and workshops throughout the meeting.
- The meeting program reflects many of the priorities of the Organization and many aspects of the strategic plan. Topics of diversity, equity, and inclusion are at the forefront; featured in several concurrent sessions, the International Station Forum, and in the plenary “The State of Diversity and Equity in Environmentalism,” by August Ball. Collaborations are prominent, too, beginning with the workshops and our partners at EDI, UFERN, and the Virtual Field, all of which provide opportunities to enhance our own programs and strengthen the mission of OBFS. Examples of research, education, and outreach showcase innovation and provide inspiration to all of us, particularly during these unique challenges. And best-management practices in conservation, fundraising, safety, and work-life balance will help provide all of us meaningful ways to survive and even thrive, as we persevere through the pandemic.
- In addition to the annual meeting, the strategic plan commands our time and attention over the next quarter. We will need to establish the implementation phase to launch the plan and make progress towards its goals. One effective implementation strategy may be to align the committees and other aspects of the Board operations more closely to the plan. Shane and I have been discussing ways in which this may occur, but we are seeking everyone's input on how best to structure things accordingly. In addition, Shane has been working diligently on the Policies and Procedures manual, trying to ensure our practices match our policies and vice versa. These updates will also help the officers, committee chairs, and other positions define their respective roles and provide a smooth transition from year to year when new members come on board. Thanks for all your efforts and dedication to OBFS.
- Additional discussion points during meeting:
  - Confirming the finance committee chair. Philippe is the chair and Peter Connors is no longer chair (he is a member of the committee).

#### **Vice President's report / Annual Meeting report – Lara Roketenetz and Tom Bansak**

- Pivoted to online format due to COVID-19 with significant help by Tom B. again.
- 159 confirmed registrants (200 last year – also in a virtual format).

- Zoom links are ready, program is ready, but we need more auction items.
- Board attendance and participation encouraged during new member welcome, social hours, board meetings, and business meeting.
- Theme for auction is freshwater.
- International forum (Rhonda/David): There will be translation in Spanish, and they are excited to initiate this forum.
- Human Diversity award (Phoebe): Two awardees and an honorable mention. Highly worthy recipients.
- Business meeting/strategic planning discussion (Chris): Each committee reports to membership along with officers. One person from each strategic planning committee should report on their section of the plan. We should also encourage OBFS members to join the strategic plan implementation phase. Shane suggests folks can sign up in the chat or sending an email.
- Poster session (Tom): Not as many presenting as in 2020 so we do not need to have break out rooms. Jason Wallace is hosting and organizing the poster session.
- August Bell plenary: Lara will introduce her. We paid for an in-person talk even though we pivoted to virtual. Her fee included travel costs and the contract was written for in-person. She has already been paid. Paul Wetzel is going to follow up with her to see about reimbursement to OBFS or a reduced fee for a future workshop. **Action Item: 1) Paul Wetzel will contact August about payment/reimbursement/workshop credit.**

**Secretary's report** – Lesley Knoll

- Nothing to report

**Treasurer report / Finance Committee report** – Paul Wetzel

- Paul Foster – membership declined based on Paul's report. Paul W. noted that membership dues are seasonal and numbers are based on the third quarter, so this is not surprising. It will be concerning if membership numbers are still lower in January 2022. Jason Tallant: 186 stations are in good standing and it seems like the number is down. Jason has been regularly getting contacted that new field station managers notice their membership lapsed. The lower membership numbers may be related to changes in staff at field stations.
- Investments are good and we have the funds to implement the strategic plan.

**Governance report** – Shane Waddell

- He is working with Chris on structuring the committees to be able to best implement the strategic plan.
- We need to address voting board members. For example, it is not clear in the by-laws if sub-committee chairs are voting members.
- He is creating a policy manual and needs each board member to help draft what their duties are.

**Human Diversity** – Phoebe Jekielek and Tori McDermott

- Discussed awardees in the VP report.
- Excited to begin strategic plan implementation.

**International report** – David Maneli and Rhonda S.

- Discussed international forum in the VP report.

**Development report** – Brian Kloeppel

- The committee is meeting monthly.
- Working to update website to receive recurring donations and to accept PayPal.



- Sarah O: the committee created a survey for field station members to rank their ability to fundraise and host events. She will send the poll out to the board and community.

#### **Joint Communications / Editor's / Outreach report –Sarah Oktay and others**

- Newsletter is going well, and they are receiving material from members.
- Annual report comes out in February and ballot will be occurring soon.

#### **AIBS update – Paul Foster**

- Annual council meeting is in November with two half day workshops on DEI. Paul submitted Tori and Phoebe as possible participants. AIBS will let them know if they are selected to attend. **Action Item: 1) Get update from Tori and Phoebe at next board meeting.**

#### **New Business**

- Proposal for restructuring committees (Chris and Shane)
  - To implement strategic plan, the board may need to be re-structured to increase efficiency.
  - One option is to structure the board committees around the strategic plan priority areas and combining some of the existing board committees.
  - Another option is to elevate some of the standing subcommittees into committees (e.g., outreach). Shane notes that this may involve by-law change since the number of voting board members might need to be increased.
  - Philippe: does not like the idea of increasing the number of committees.
  - Lesley: could we combine the international committee and human diversity committees? Rhonda: would need to think about that more.
  - Paul W. and Skip: We should move fast to get the plan implemented as soon as possible and not get bogged down in bureaucracy.
- Strategic planning overview (Chris)
  - He summarized how he will organize strategic plan discussion that will occur following the Business Meeting. He noted that each committee needs to finalize 1 – 3 priorities for year 1 for Chris to present. Each group also needs to designate a spokesperson.

Temporary adjournment at 3:07 PM Central time on September 20, 2021

### **September 23, 2021**

#### **OBFS Business Meeting: Open to all attending members**

Present: Lesley Knoll, Chris Lorentz, Lara Roketenetz, Sarah Oktay, Shane Waddell, Elizabeth Long, Paul Wetzel, Brian Kloeppel, Rhonda Struminger, Stacy McNulty, Mary Hufty, David Maneli, Phoebe Jekielek. OBFS members also present.

Meeting started at 1:34 PM CST

- President's Report (Chris Lorentz).
  - Chris described the board structure, the open board positions, and the recent vote to provide need-based travel support for board members to attend the annual meeting. This change is in acknowledgement that some stations are better funded than others and the board does not want

limitations on travel funding to prevent someone from serving on the board. Chris provided several highlights of past year efforts:

- 1) advocacy for field stations considering COVID-19 financial hardships. This included an online petition with over 2,000 signatures, a *BioScience* article, a *Science* editorial, submissions to NYT and Chronicle of Higher Education, a letter to NSF Assistant Director and Program Officers, letters to congressional committees (with assistance from AIBS), and contributing new language to the House NSF Reauthorization Bill with help from Joe Bischoff at Cornerstone in DC.
- 2) Ongoing collaboration work: AIBS, NAML, UFERN, Virtual Field.
- 3) DEI: sessions and plenary with this focus, potential spring DEI workshop, international committee new initiatives (forum, matching program).
- 4) Governance work: updating policies and procedures, clarifying roles.
- 5) Development committee work: meeting monthly, created new survey, grants identified, concurrent session.
- 6) Strategic Plan finalized and moving to implementation phase. Chris also provided opportunities for members to get involved (strategic plan, listserv, newsletter, annual meeting, website documents, virtual events, and leadership roles).
- Secretary's Report (Lesley Knoll). Noted the board has quarterly meetings and all members are welcome to attend. If unable to attend, the minutes are available for those interested.
- Treasurer's Report/Finance Committee Chair (Paul Wetzel)
  - Paul gave a budget review and noted the finances look good. OBFS is in a good position to implement the Strategic Plan and other initiatives.
  - Paul also highlighted some changes in past year(s): previously OBFS had money spread around several banking institutions and it has now been consolidated. The fiscal year has been changed from September – August and is now January – December. This is important to keep in mind when reviewing quarterly reports because income for OBFS is seasonal. Some of the restricted funds are now in a social investment fund with Vanguard. About \$250,000 of the restricted funds were put into a money market account recently.
  - Current active membership is 187.
- Committee Reports (Committee Chairs)
  - Annual Meeting Planning Committee (Lara Roketenetz). Described role of VP in leading the committee. Encouraged members to join on the annual planning committee and submit ideas for future meetings.
  - Diversity Committee: Phoebe Jekielek. Described committee role and that the call for the Human Diversity award will come out in January. New members are welcome.
  - Governance Committee: Shane Waddell. Described role of committee. Current efforts include updating policies and procedures information to ease transitions of board members.
  - International Committee: David Maneli and Rhonda Struminger. Described role of committee, the new Matching Program initiative, and translation services provided for some of the 2021 meeting. They welcome new members and input.
  - Nominations Committee: Stacy McNulty. Open positions: President, member-at-large two, secretary, member at large early career.
  - Development Committee: Brian Kloeppel. Organized a concurrent session and created a survey about fundraising efforts and potential at member stations. Meetings are monthly and others are welcome to join.
  - Outreach Committee: Lisa Busch (reported by Chris L)
    - Congressional Visits Day report. Description of CVD with AIBS that provides training on talking with legislators on Capitol Hill.
  - Communication Sub-Committee: Vanessa Trujillo, reported by Sarah Oktay (Editor). Described the role of the committee in assisting with newsletter and ballot process.

- AIBS Report: Paul Foster. Described AIBS, relationship with OBFS, and joint efforts to bring field station COVID hardships to the attention of scientific community, NSF, and Congress.
- Auction preview by Elizabeth Long.
- Short Presentation by 2022 Annual Meeting Host (Central Michigan University Biological Station) - John Gordon. This is planned to be in person from September 14 – 17, 2022 (workshops likely 13<sup>th</sup>).

## **Board of Directors Meeting Resumed at 9:06 AM CST on September 27, 2021**

**Board Members Attending 9/27:** Lesley Knoll, Chris Lorentz, Shane Waddell, Paul Wetzel, Sarah Oktay, Elizabeth Long, Brian Kloeppel, Stacy McNulty, Phoebe Jekielek, Rhonda Struminger, Lara Roketenetz, Jason Tallant, Tori McDermott

**Board Members Absent 9/27:** Lisa Busch, Vanessa Trujillo, David Maneli, Faustine Bernadac, Mary Hufty

**Guests Attending 9/27:** Philippe Cohen, Tom Bansak, Brett Biebuyck, Skip Van Bloem, Andrew Rappe, Paul Foster (invited guest for AIBS rep)

Call meeting to order (9/27) – Chris Lorentz at 9:06 AM Central time

### **Meeting recap (Tom/Lara)**

- Meeting went well and biggest problem was that a leader for a session did not show up. Lara and Brett were able to do quick triage on this issue.
- Paul W. noted that he received good feedback from an international participant. Tom B. also noted a new member wrote him with great feedback as well.
- Largest attendance for one session was around 70. There were around 60 – 70 people at plenaries and about 25 people for each concurrent session.
- Lara is working on the post-meeting survey and she has access to the past survey.
  - **Action Item: 1) Lara will update the survey and send it out to meeting participants.**
- Lara would like advice for hosting an in-person hybrid meeting since she has not participated in organizing an in-person meeting yet.
- Lara suggests holding off just a bit for 2023 meeting host nominations. Brett is working on a new call.
- Sarah: How should we post meeting videos on YouTube? Board generally agrees with Sarah that we should post them on OBFS YouTube channel as public unlisted to minimize spam, increase protection, and increase visibility with OBFS community. Lesley asks if we can share August Bell's plenary and Sarah asks the same about Peter McCartney's. Lara will check on this. **Action Item: 1) Lara will check in with August and Peter about posting their videos on YouTube.**
- Rhonda: International forum update. Great response to the matching program and enthusiasm for increasing international participation in OBFS. The attendees were engaged.
  - Rhonda noted that in her position as Member-At-Large (MAL), she is supposed to be on the Annual Meeting Committee, and she was not aware of it initially.
  - She also noted that the Early Career Travel Award is combined with the International Travel Award. She suggests these being separated in the future.
- Paul Foster: Noted that we did not vote on the budget in the 2021 annual meeting as we typically do. Shane/Sarah suggest having the membership vote on the budget during the board nomination vote. **Action Item: 1) Paul W. will prepare a budget for the OBFS membership to vote on to be included in the ballot (below).**

- Stacy: Board nominations are finalized as below. Jason Tallant noted that he, Skip, and Paul W. should confirm the voting members are listed with correct contact information. **Action Item: 1) Sarah will create the ballot and send it out to voting OBFS members, 2) Jason T. et al. will contact voting members to confirm voting member active email addresses.**

Name	Position
Lesley Knoll	President
Stefanie Whitmire Teresa Schueller Michael Flinn	MAL 2
Beth Norman Sheena Parsons	Secretary
Andrew Rappe Jonathan Frommeyer Scott Thomas	MAL Early Career

#### Update on policy and procedures manual (Shane)

- Shane is creating a policy and procedures manual for OBFS. He has contacted all the officers and committee chairs to get information on their roles. He is also compiling what gets handed off in during transitions. He would like to have a working copy of the manual by April 1, 2022.
- He is also figuring out the best place for the board to store electronic files.
- Shane also suggests preparing a playbook for hosting future meetings. This can be based on previous documents and incorporate relevant updates for current practices.

#### Implementation phase of strategic plan (Chris)

Chris suggests the following steps (note addenda from November 16, 2021):

- 1) maintain the current committee structure and assign strategic plan action items to each committee
- 2) create an ad hoc committee for website development (Jason T., Skip, Sarah, Paul W. others)
- 3) add DEI or rename Human Diversity committee
  - Elizabeth, Phoebe, and others support changing the name of the Human Diversity committee to something else (e.g., DEI, DEIJ, JEDI, IDEA, etc.). There was a long discussion on what the best name is. **Action Item: 1) Human Diversity will come back to the board with a recommendation on what the new name should be. There will likely be a discussion and vote via email.**
    - Addendum: board discussion and vote on November 16, 2021 to rename Human Diversity Committee to IDEA + (Inclusivity, Diversity, Equity, and Accessibility).
- 4) Proposed ad hoc committee for website
  - Shane and Jason suggest making it part of the membership support committee. Skip notes that a subset can form a subcommittee to help on this. Others may be interested in joining and that is okay to do (e.g., Rhonda, Sarah, etc.).
  - Shane suggests that they consider the timeline of this effort and update the current website for outdated information.

- Sarah said the new website may be able to happen quickly (possibly two months). Jason T. notes that we should transition to a new website after the beginning of the year because of membership renewal.
- 5) add a collaboration committee chaired by Paul Foster.
  - Paul Foster briefly described the possible role of this committee and the ways it can liaison with other organizations (e.g., NAML, UFERN, AIBS, etc.). **Action Item: 1) Paul Foster will send out a summary to the board of this proposed committee. There will be a discussion and vote via email.**
    - Addendum: board discussion and vote on November 16, 2021 to approve new Collaborations Committee, with Paul Foster assuming the Chair position.
- Shane adds that we currently have a finance and membership committee, but it basically is the role of the treasurer. He suggests eliminating the finance committee and keeping the investment committee to inform the treasurer on investments. Philippe said the original reasoning for this committee is that the finance committee members have access to the finances should something happen to the treasurer. It also keeps the treasurer ethical. Skip/Paul W: we do not need a committee for this role and we can resolve in other ways.
  - *Paul W. makes a motion to rename the Finance and Membership Committee to the Membership Support and Services Committee. Shane seconds. Motion passes unanimously.*

### **Other new business**

- Jason T: Membership renewal is coming up. November 5 will be the first date of notification. In 2020/21 we had a budget relief option if requested. Do we want to do this again in 2021/22? Paul W. notes that only about 5 people requested this in 2020 for a total of \$1500. Largest portion came from Harvard Forest who had a freeze on subscriptions.
  - *Chris makes a motion to offer complimentary membership for struggling field stations. Lesley seconds. Motion passes unanimously.*
  - Shane suggests we make this a permanent option. Chris suggest that the Membership committee should create language for the board to vote on a permanent option. **Action Item: 1) Membership committee will create language and a process for stations to request membership relief. The board needs to vote on making this a permanent option.**
- Lara: Suggested OBFS consider creating and selling swag for promotion and making money. Brian K. said this could help with the development committee. Lara noted there are options for orders to be on-demand rather than someone needing to hold stock somewhere in person. Philippe is worried that people do not need more stuff. Lara says that is a legitimate concern, but we can use on-demand services and focus on organic options. **Action Item: 1) Lara will investigate options.**

Call to adjourn meeting (9/27/2021) – Chris

- Lesley made a motion to adjourn the meeting and Stacy seconded. Passed unanimously. Meeting adjourned at 10:37 AM central time.

## **OBFS Board of Directors Quarterly Conference Calls**

### **April 14, 2021 BOD Meeting**

**Board Members Attending:** Lesley Knoll, Chris Lorentz, Shane Waddell, Paul Wetzel, Sarah Oktay, Elizabeth Long, Brian Kloeppel, Jason Wallace, Paul Foster (invited guest for AIBS rep), Brett Biebuyck, Stacy McNulty, Phoebe Jekielek, Vanessa Trujillo, Rhonda Struminger, Lara Roketenetz

**Board Members Absent:** Lisa Busch, Mary Hufty, Faustine Bernadac, Jason Tallant, David Maneli, Tori McDermott

**Guests Attending:** Philippe Cohen, Tom Bansak

Call meeting to order and welcome new members – Chris Lorentz at 1:02 PM Central Time

### Old Business

- Approval of meeting minutes, December 2020 – Lesley Knoll. Motion to approve from Paul W. Sarah O. seconds. Motion passes unanimously.
- Review of December Action Items – Lesley. **Action Items remaining: 1) Chris L. will reach out to International Committee and Outreach Committee to see about finding a new chair for each, 2) Sarah O. will reach out to Paul W. for new member list to include in next newsletter, 3) Brett will create a new draft for the call to host meeting proposal.**
- Strategic plan updates – Chris L.
  - Chris gave a short presentation on the status, member feedback, and path forward. Chris said our plan is ambitious, we likely need external resources (funding and personnel) to implement the plan, we need to consolidate and prioritize the action items, and a way to monitor the progress.
  - For each annual meeting, there will be time set aside, likely during the business meeting, to update the organization on progress made.
  - The membership was asked to provide responses on the plan, but we only had two responses despite giving them 4 weeks for feedback. It could have been the timing of the request, or the members may be satisfied with the plan.
  - Jenn Seavey, Sarah O, and Philippe will provide editorial review of the plan before it is finalized.
  - The official launch of the plan will be during the Flathead Lake meeting. Chris would like the board to consider a press release.
  - The implementation phase will begin in September.
  - Chris made a year 1 list of priorities for each focus area and asked the board for feedback. Some highlights include: website overhaul, demographic survey, DEI efforts, international committee proposal, creating one pagers for raising awareness focus area, continue with advocacy, strengthening collaborations (e.g., NAML, UFERN, AIBS), minimum of one grant proposal for development committee, and update policy manual (governance).
  - Discussion about having a project manager or an implementation committee to keep the strategic plan on track.**Action Items: 1) Lesley will schedule a strategic plan zoom meeting, and 2) Chris will update the draft of the plan.**
- UFERN update – Stacy M. UFERN (RCN) steering committee recently had a meeting. Some recent papers accepted that will benefit the OBFS community. UFERN received new funding to continue some of the work.



They will continue to do panels, webinars, etc. There will be an online assessment tool, about the impact of field stations on students, coming soon. **Action Items: none.**

- SHIELD update – Stacy M. Another RCN in development that Stacy and some others are involved in. It would be another avenue for OBFS members to get involved in. They may want OBFS to be a formal partner necessitating a review by the board. **Action Items: none.**
- Virtual Field update – Sarah O.

## **President, Vice President, Secretary, Treasurer and Committee Reports**

### **President's Report – Chris Lorentz**

- For starters, I would like to welcome our new Board members and Committee Chairs. It's an exciting time as the Strategic plan gets finalized, and we are looking forward to working with all of them. The implementation phase will begin with a kick-off during the fall annual meeting. The process for the implementation phase will be a critical part of our work in the next few months.
- Regarding the Strategic Plan, the membership had the past month to offer feedback which will incorporate into the final draft. I believe the next steps are to:
  - Finalize the draft and resend to the membership as an FYI,
  - Determine best path forward to launch and implement the plan,
  - Prioritize the action items into short-term (1 year), intermediate (1-3 years) and long-term (3-5 years)
- Two important pieces of the implementation plan will be the allocation of funds and the individuals or companies with whom we may contract to accomplish various actions items. I anticipate a sizeable investment, particularly during the first year with the website, with marketing and with DEI efforts.
- The X-FSML Virtual Field Project team, spearheaded by Claudia Luke, Hilary Swain, Kari O'Connell, and Sarah Oktay continues to offer programs and other resources for the OBFS community and educators. I would like to continue our support of this initiative.
- Sarah, Vanessa, Paul, Lisa, and others put out another excellent and informative newsletter in February. Calls for the next newsletter have been sent out.
- Late in 2020, a small group of OBFS members began an initiative to raise an awareness of the impacts of pandemic on FSMLs. An online petition was distributed for individuals and organizations to express their support which is currently posted on our website. It has over 2000 signees, including nearly 20 past presidents of OBFS. A "viewpoint" article was published to *BioScience*, and a second article for the Chronicle of Higher Education was submitted but rejected for publication. Other venues are being considered. In addition, we worked with AIBS to ask Congress for targeted funding assistance to support the operations and maintenance of FSMLs. We also sent a similar letter to related NSF program officers. Related to this, we sent out a survey to quantify the effects of the pandemic among our members. We are currently summarizing the results for distribution and future advocacy efforts. Lastly, Joe Bischoff with Cornerstone Consulting in DC has offered advice to these efforts on a volunteer basis, due to his current work with OTS and his past experiences at field stations. He will be presenting an overview at this Board meeting.
- Related to this, we met recently with NAML leaders to discuss how we can partner together on related efforts. They were receptive to this and offered two complimentary registrations to their recent Public Policy meeting. Sarah Oktay and Philippe Cohen attended on behalf of OBFS. A big thanks to both for their participation and feedback. We should explore the possibility of another joint meeting with NAML in the future.

- Also, there are many other initiatives, projects, and grants either ongoing or in the planning stages with which several Board members are involved (e.g., SHIELD, U-FERN, etc.). If any member would like to provide updates, please feel free to do so.

#### **Vice President's report / Annual Meeting report – Brett Biebuyck**

- Annual Meeting Planning Update
  - Focusing on making the meeting as hybrid as possible for international attendees and those not able to join for travel restrictions.
  - The meeting will be an in-person barring any covid issues.
  - Registration to go live as soon as workshops are finalized. End of May or by mid-June.
  - 2 of 3 plenary sessions are set but need to finalize workshops and concurrent sessions.
  - Working on draft for call for 2023 meeting. There will be a focus on accessibility options including hybrid options.
  - Local Hero Award. Some options of individuals have been identified.
  - There was a discussion about different awards: specifically, the Friend of OBFS vs Distinguished Service Award. Tom, Brett, Lara, and Brian will make a formal policy document for the Distinguished Service Award. There was also discussion about who a Distinguished Service Award may go to this year.
  - Discussion about the auction and whether some of it can be virtual. Elizabeth said the auction team needs to discuss this all more.

**Action Items: 1) committee will finalize a draft call for the 2023 meeting, 2) workshops and concurrent sessions will be finalized by the committee, 3) Tom and his team will open up registration in late May to mid June, and 4) Brian, Brett, Lara, and Tom will make a policy document for the Distinguished Service Award, and 5) auction team will continue to discuss ideas and the plan for the 2021 meeting.**

#### **Secretary's report – Lesley Knoll**

- For OBFS documents, use Dropbox. Ask Sarah Oktay for access to OBFS folder if you need it. **Action Items: none.**
- Please send conflict of interest forms if you have not done so. **Action Item: Lesley will reach out to members who have not filled out their COIs.**

#### **Treasurer report / Finance Committee report – Paul Wetzel**

- Quarter 1 financial update and other financial updates. Minimal expenses because of no travel and no in-person meetings. Investments discussion including that there was a split done to ensure there is money set aside for any strategic plan funding needs. Paul submitted taxes but will need to do an amendment because of the proceeds from selling off Vanguard. Brett did the audit. **Action items: Paul will check on tax amendment.**
- Chris asked if Paul sees any change in membership especially in relation to covid. Paul said no but is wondering if we may see a difference in the future. **Action items: none.**
- OBFS brochures: Paul W. has four book boxes filled with Field Station brochures. Stacy may have 3 more boxes. Paul has had them since they were bought 2 years ago. To date, Paul have sent out 500 (out of 10,000) brochures. The Board should discuss what to do with the remaining brochures. **Action item: Paul W. will send 1,000 to Tom for the annual meeting so attendees can grab a handful.**

#### **Governance report – Shane Waddell**

- Nothing to report. **Action Items: none.**

**Human Diversity – Phoebe J. and Tori M.**

- Recognize Amy Whipple for her effort on heading this committee for many years.
- Human Diversity Award: No nominations yet. Tori will send out another reminder to the listserve. Please share within your networks and encourage applications/nominations.
- Committee Members: Clarification on the current members of the Diversity Committee.
- Names: Thinking of renaming both the HD Award and the Diversity Committee. We'll be soliciting feedback about both of those efforts.

**Action Items: none.**

**International report – David M.**

- Updated language on international award expenses eligible for coverage for 2021 (covid-related).

**Action Items: Sarah will send the International Committee Report to the board for review.**

**Development report – Brian Kloeppel**

- Nothing to report. They are meeting monthly. They are looking for current OBFS resources or external resources to fund the strategic plan. They are looking at each strategic fund goal and how it may be funded. **Action Items: none.**

**Joint Communications / Editor's / Outreach report –Sarah Oktay and others**

- Nothing to report. **Action Items: none.**

**AIBS update – Paul Foster**

- Nothing to report. **Action Items: none.**

**Nominations Committee – Stacy M.**

- Openings for next election: President, Secretary, Member-at-Large. Nominations will be accepted at the annual meeting in September. **Action Items: none.**

**New Business**

- Short presentation by Joe Bischoff from Cornerstone consulting company (organized by Chris L.). Joe is a lobbyist that gives strategic advice, and he has a background in the natural sciences. His firm has been retained by OTS for environmental social justice. He gave a short presentation including thoughts on elevating the awareness of OBFS in DC and getting support for field stations in legislative acts / bills. He is interested in concise, impactful facts about the importance of field stations to share on the hill. **Action item: Chris L. will follow up with him.**
- Stacy M – Futurum
  - Recently met with Futurum. They would like to create articles on field station research and monitoring; to produce/publish one costs about \$2000 or up, so would need either to use OBFS' outreach budget or to find a donor/source of funds. They have a team that writes, designs and publishes articles like this one: <https://futurumcareers.com/living-libraries-and-outdoor-laboratories-1200-ways-to-teach-your-students-outside-the-classroom>
  - Broadly, OBFS might consider further working with Futurum to create nice STEM-content articles geared to high school students/teachers. When we did this for the field station article, the process was professional and fun and resulted in a high-caliber publication.

- Do we want to put OBFS funds toward one or a series of Futurum articles that amplify our message?
- How to honor Peter M from NSF – all
- University of Georgia researcher wants the member list for a research project (Chris L.). Discussion about knowing the project and that our contact list is not public. Shane suggested we can send him a list without names and contact. **Action Item: 1) Chris L. will reach out to the researcher for more information and to potentially give him a list without names and email addresses.**

Call to adjourn meeting – Chris.

- Brian K. made a motion to adjourn the meeting and Jason W. seconded. Passed unanimously. Meeting adjourned at 3:10 PM central time.

## **OBFS Board of Directors Meeting [Open Conference calls quarterly]**

**June 22, 2021**

**Board Members Attending:** Lesley Knoll, Chris Lorentz, Paul Wetzel, Sarah Oktay, Lara Roketenetz, Brian Kloeppel, Elizabeth Long, Tori McDermott, Stacy McNulty, David Maneli, Jason Tallant

**Board Members Absent:** Lisa Busch, Mary Hufty, Faustine Bernadac, Shane Waddell, Phoebe Jekielek, Vanessa Trujillo, Rhonda Struminger, Paul Foster (invited guest for AIBS rep)

**Guests Attending:** Philippe Cohen, Tom Bansak, Skip Van Bloem

Record ann meeting – Lesley Knoll

Call meeting to order – Chris Lorentz at 12:06 PM Central Time

### **Old Business**

- Approval of meeting minutes, April 2021 – Lesley Knoll. Motion to approve from Stacy M. Paul W. seconds. Motion passes unanimously.
- Review of April Action Items – Lesley. **Action Items remaining: 1) Chris L. reached out to the International Committee and Outreach Committee to see about finding a new chair for each. David M. will stay on as International Committee lead for now. Rhonda S. is interested in serving as the co-chair of the International Committee (with David) as long as it is okay to be both Member-at-Large and a committee co-chair. Chris will follow-up with Shane on governance to verify this is acceptable. Chris will confirm with Lisa Busch her plans for chairing the Outreach Committee.**

## **President, Vice President, Secretary, Treasurer and Committee Reports**

### **President's Report – Chris Lorentz**

For this June meeting, the strategic plan and annual meeting will take priority. Beyond the routine committee reports, we will ask Lara, Brett, and Tom to share the latest plans for OBFS 2021.

Regarding the Strategic Plan, the latest draft was sent to the planning team on Friday, June 18, along with a spreadsheet to list Year 1 priorities. I believe the next steps are to:

- finalize the plan,
- prioritize the Year 1 action items,
- estimate financial resources necessary to achieve these, and
- start to formulate the implementation plan which may include new committees, renaming of existing committees, and hiring external support for specific tasks such as the website overhaul.

The expectation is to launch the plan at the annual meeting in September 2021.

The ad-hoc advocacy group, led by Kelly Swing, Dave Wagner, and others begin writing a series of articles in support of FSMLs. Among other items, this group has managed created or contributed to the:

- online petition
- BioScience article
- Letters to congressional committees
- Letter to NSF
- Pandemic-related survey
- FSML input/language to congressional committees for consideration in the NSF reauthorization act
- Editorial submission to the Chronicle, though rejected it brought administrators on board and is being re-worked for submission to the NYT
- Stronger collaboration with AIBS and NAML and
- an International piece in draft.

Lastly, through our work with Joe Bischoff from Cornerstone, we were given the opportunity to write some language for consideration in the NSF Reauthorization Bill. Sarah Oktay and Ian Billick took the lead on this, along with Philippe Cohen, Stacy McNulty, and others. Some of the language made it through the review process and currently the phrase “field stations and marine labs” is mentioned several times alongside national labs and other institutions. It’s a significant step to have FSMLs explicitly stated in the bill. We are hopeful this language will remain in the final act that is likely to be passed in the fall. Many thanks to Joe for all his efforts and willingness to work on our behalf.

### **Vice President’s report / Annual Meeting report – Lara Roketenetz**

- Annual Meeting Program Update
  - 9 concurrent sessions that fall along three themes.
  - Plenary sessions are finalized.
  - Lightning talks announcement is out.
- DEI plenary update and post-meeting workshop
  - August Bell of Cream City Conservation and Consulting was suggested to serve as a plenary speaker on DEI. The quote for this is \$5,000. Her plenary would focus on setting a shared language in our organization to enable us to talk to each other about DEI. The board needs to decide if that is a reasonable expenditure. Strategic planning committee gave good feedback on this idea and noted that it falls in line with some of the strategic plan initiatives.
    - *Motion by Lara R. to retain August Bell’s services and to sign a contract with her for \$5,000. Seconded by Rhonda S. Motion passes unanimously.*
    - **Action Items: 1) Lara will finalize the contract with August, 2) Lara will send Paul W. the contract for processing and payment.**
  - August would also be willing to do a virtual workshop later in the year for \$5,000. This would be a more intensive workshop that would be on recruitment and retention in the field. OBFS could charge

participants to recoup some of the costs if that is of interest. A decision on this workshop is not needed today.

- Tom Bansak (meeting host) - Annual Meeting update
  - External portion of the website and registration portal are nearly complete, and the website will go live in a few days. Workshops and field trips are finalized.
  - Registration, lodging, and food costs are reasonable for the meeting (\$430).
  - The in-person cap will be 125 people.
  - \$40 for remote attendees, but some workshops are an extra fee.
  - Sarah O. asks if we are having the Sunday morning board meeting during the Annual Meeting or if we will hold it after board members return home.
    - Board decided to hold the traditional Sunday meeting later and once folks have returned home.  
**Action Item: 1) Lesley will send out a doodle poll to figure out when the post-meeting board meeting should be held.**
- Nominations for awards (see attachments) – Tom and Brian K.
  - Annual award nominations – Tom Bansak
    - Sarah O. and Brian K. notes that the Friends of OBFS award is for someone who benefits OBFS as a whole and not just one or two field stations.
    - Brian K. suggests that Tom selects one or two recipients for the Local Hero Award. He can choose on his own.
    - **Action Item: 1) Tom will send the final recipient choice(s) for the Local Hero Award to Brian K. so he can start the process on the plaque(s).**

#### **Secretary's report – Lesley Knoll**

- Nothing to report

#### **Treasurer report / Finance Committee report – Paul Wetzel**

- Our income this quarter has been minimal, and this is not surprising because it is seasonal.
- We have had modest expenses for items like the website and sponsoring people to attend the virtual AIBS communications bootcamp.
- Our investments are earning positively. Total assets are at \$670K +. There is money to invest in our strategic plan.
- Sarah O. request – it is time to renew for Virtual Field and the OBFS zoom account and asks if OBFS will continue to pay for it. It is around \$2,000 (\$1,300 for zoom, \$500 for Virtual Field) per year. Chris notes that the earlier board approval was for OBFS to continue to fund these items until it could no longer afford to do so.

#### **Governance report – Shane Waddell**

- Nothing to report.

#### **Human Diversity – Phoebe Jekielek and Tori McDermott**

- Tori requests for board members to nominate, or tell other to nominate, worthy individuals of the Human Diversity Award.
- Social Media discussion: Lara suggests posting the Human Diversity Award and other OBFS announcements on social media. Sarah O. notes that OBFS desperately needs help on social media. She welcomes volunteers. Chris suggests that we put some efforts and money into social media assistance in the year 1 priority for the Raising Awareness strategic planning section (Hoot Suite, social media interns, etc).



### **International report – David Maneli**

- David suggests extending the deadline for the travel awards especially since registration has not opened yet. The board agreed this was a good idea.
- Early career applications have been coming in, but international applications do not look as good. This is likely a result of potential travel bans related to covid.
- If we do not have international applications, Rhonda and David suggest paying for translation services to enable participation by international stations. This will be determined later once we see how the covid situation looks. We may need to do a board vote on this item via email.
- Twinning Program
  - A new, suggested program with a focus on promoting the association of two field stations.
  - The committee envisions this program will have a flexible structure. For example, there may be two stations in different countries or two stations with common research interests that team together.
  - Chris suggests incorporating this program into the Strategic Plan under Member Support and also to narrow down the criteria for stations to be involved.

### **Development report – Brian Kloeppel / Sarah Oktay**

- The committee is meeting monthly
- They are sharing the newsletter with their development list.
- Sarah O. asks if we have Mailchimp. She suggests that this format would work best for donor emails rather than our OBFS listserve. Sarah will investigate the price and work on getting it for OBFS. She noted that a free account may work for our needs and Brian may have log-in information for a free OBFS account. **Action Item: 1) Sarah will either sign OBFS up for Mailchimp or get existing log-in information from Brian.**

### **Joint Communications / Editor's / Outreach report –Sarah Oktay and others**

- This group is working on donor language for when the newsletter is sent out to that group.
- The committee wrote and finished a press release in less than 48 hours. Chris notes Sarah's BIG efforts on the PR.
- Sarah is starting a new, exciting position in January. She will have less time to devote to OBFS but is committed in staying involved. There may need to be a succession plan for the Editor's position at some point.

### **AIBS update – Paul Foster**

- Nothing to report

### **New Business**

- Vote on committee structure – Chris / Shane
  - Defer until a later date.
- Discussion on formally creating an OBFS Distinguished Service Award (see attachment) – Brian K. (along with Chris, Lara, Brett, and Tom)
  - A draft of the award was distributed to the board. The award would go to someone who had a lifetime of dedication to FSMLs or significantly altered field stations in a positive way.
  - This is not an award we are obligated to give every year, and in some years, we may give it to more than one person.

- The committee considered a \$1,000 donation to the recipient's field station or to help the recipient defray travel costs to the meeting.
- *Paul Wetzel made a motion to create a new award, Distinguished Service Award, accompanied by \$1,000 to defray travel costs to the OBFS Annual Meeting or for a donation to the recipient's home field station. Seconded by Sarah Oktay. Motion passes unanimously.*
  - Discussion: Lara R – asked what if the person is retired or not with a field station. She suggests that the payment should be flexible. Philippe suggests it should be either used to defray travel costs or donate it to a field station of the recipient's choice.
  - *Amendment to change the recipient's options for the \$1,000 award as: ...accompanied by \$1,000 to defray travel costs to the OBFS Annual Meeting or for a donation to the recipient's field station of choice. Paul W. agrees to this friendly amendment. The motion passes unanimously.*
- *Chris makes a motion to give the inaugural OBFS Distinguished Service Award to Art McKee. Sarah seconds. The motion passes unanimously.*

**Action Item: 1) Brian K. will finalize the language of the award along with the rest of the committee.**

- Strategic Planning – Chris.
  - The spreadsheet Chris sent out needs to be filled out and finalized by September in time for the Annual Meeting.
- LEAPS RFP – Chris
  - NSF put out a letter about this program in the spring. It's a new program for organizations to make changes around DEI. Organizations can apply for a large award to make broad, large-scale changes or apply for workshops.
  - Chris asks if OBFS can submit a NSF proposal as an organization or do we need one of our institutions to do this. Philippe said OBFS has done this in the past and that Ian Billick should know more.
  - Sarah O. suggests that the DEI Strategic Plan Committee and Development Committee work on this jointly together as an *ad hoc* committee.
  - Lara offered to take the lead on a proposal and this effort starting sometime in September. Tori (and maybe Phoebe) can also help. Chris suggests for OBFS to submit a workshop proposal rather than a larger proposal for large-scale change.

**Action Item: 1) Lara and Tori will start working on this after the OBFS Annual Meeting in September.**

Call to adjourn meeting – Chris

- Lesley made a motion to adjourn the meeting and David seconded. Passed unanimously. Meeting adjourned at 1:57 PM central time.

**\*\*DRAFT 08 May 2021\*\***

**OBFS Distinguished Service Award - Identification and Review Process**

**What:** As part of OBFS's desire to recognize extraordinary efforts, on occasion the OBFS Board may wish to recognize an individual whose lifetime and/or significant contributions deserve an 'OBFS Distinguished Service Award'. We wish to have an approved process and procedure to identify, review, and honor a person whose leadership, vision, and service have helped to promote OBFS and its mission.

**Why:** Recognizing a person who qualifies for an 'OBFS Distinguished Service Award' will be an opportunity to:

- 1) Publicly acknowledge and thank internal champions of OBFS ("internal" means past or present OBFS members or personnel from past or present OBFS member field stations).
- 2) Highlight a lifetime and/or significant impact of OBFS leadership, strategic visioning, board or committee effort, dedication, and service to benefit future field science students, staff, and leaders.
- 3) Create a larger network of individuals who recognize the value and importance of field stations, and their science, education, and outreach.

**How:** Process to identify an ‘OBFS Distinguished Service Award’ nominee

- 1) The OBFS Board at our Spring Board meeting will consider any nominations received from October through March to potentially recognize a winner at our September Annual Meeting.
  - a. The nomination will include the name, affiliation, and justification of why OBFS would want to recognize an individual.
  - b. After discussion and vetting of the nominee, if the OBFS Board has a quorum and votes with a simple majority, the nominated individual will be approved.
  - c. OBFS will provide a plaque to the individual and a \$1,000 payment to the winners’ home field station to help offset the cost of annual meeting attendance for the winner and/or as a donation to the field station in the name of the award winner
  - d. Plaque verbiage 1: “**Distinguished Service Award**”
  - e. Plaque verbiage 2: “This award recognizes a lifetime and/or significant impact of OBFS leadership, strategic visioning, board or committee effort, dedication, and service to create a larger network of individuals who recognize the value and importance of field stations, and their science, education, and outreach.”
- 2) OBFS is not required to recognize an ‘OBFS Distinguished Service Award’ winner each year and may wish to recognize multiple winners if a quorum of the board agrees.
- 3) The approved individual will be recognized at the OBFS Annual Fall Meeting.
- 4) Establish both a perpetual award plaque noting past winners and establish an OBFS web page listing each winner and a short biography and photo.

**Addendum from November 16, 2021: Strategic Plan Implementation Phase meeting**

From Chris on Nov. 18, 2021: Here's a recap of yesterday's meeting regarding the OBFS Strategic Plan.

*Note: Italicized text inserted by Lesley Knoll.*

- The Strategic Planning Team will dissolve as the Committees will assume the implementation phase of the Strategic Plan.
- A big thanks to all those who served on this team and a strong encouragement for each member to join a committee to help with the plan's implementation.
- The name change for the Human Diversity Committee was approved. The new name is IDEA+ (Inclusivity, Diversity, Equity, and Accessibility).
  - *Phoebe made a motion to rename the Human Diversity Committee to IDEA+ (Inclusivity, Diversity, Equity, and Accessibility) Committee. Elizabeth seconded. Motion passed unanimously (10 yes, 0 no, 0 abstentions).*
- This committee will provide a brief description of their charge, along with a Values Statement, to be included in the updated Policies and Procedures manual.
- Each committee was asked to send similar information to Shane for the P & P manual.
- The new Collaborations Committee was officially approved, with Paul Foster assuming the Chair position.
  - *David made a motion to create a Collaborations Committee. Elizabeth seconded. Motion passed unanimously (10 yes, 0 no, 0 abstentions).*
- The list of action items for Year 1 were refined (attached) with the plan to approve expenditure of related funds during the next Board meeting (in January).
- Some noteworthy action items from this list that are currently underway include:
  - The International Committee has launched the pilot Matching program and are currently accepting nominations.
  - The International Committee will hold a virtual cafe for members around particular topics.

- The Membership Committee, along with a few others, are in the "scoping process" of the website overhaul.

The Annual Meeting Planning Committee will incorporate priorities of the plan into the meeting program, including topics around IDEA+.

**OBFS Budget Summary and Treasurer's Report for the 2021 Fiscal Year** (for additional information on any category, contact Paul Wetzel at [Treasurer@OBFS.org](mailto:Treasurer@OBFS.org) or [pwetzel@smith.edu](mailto:pwetzel@smith.edu))

OBFS finances continued to remain strong through the second year of the COVID-19 pandemic. In 2021, income from membership dues, investment gains, and donations totaled \$42,853. Revenue from the second virtual OBFS auction was \$9,295 (thanks to all that participated!) for a total annual income of \$50,998.

Expenses for the year totaled \$23,134, the lowest amount in past three full fiscal years. Lack of travel grants to the annual meeting and Congressional Visits Day significantly reduced expenses in 2021. Most expense lines are self-explanatory, but a few deserve comment. The *Organization Membership Dues* (\$2,700) pays for membership in the American Institute of Biological Sciences. OBFS also continues to fund (\$3,166) the *Communications* infrastructure for **The Virtual Field Project**.

*Website and Data Management* included \$4,862 for website and membership database services. The OBFS webmaster, Jason Tallant, donated his time in 2021, keeping expenses in this budget category low. Finally, the virtual annual meeting this year did not include travel costs but did include speaker fees (\$5,000), an OBFS donation to a field station (\$1,000) on behalf of the OBFS Lifetime Achievement Award winner Art McKee, and general meeting expenses for translation fees, award plaques, and miscellaneous meeting charges by Flathead Lake Biological Station for a total meeting cost of \$8,256.

Investment assets in Vanguard include a money market fund (\$235,307), and an investment mutual fund (\$365,794) totaling \$610,101. Cash assets at the end of the year were \$136,665, making the total net assets for the organization equal to \$737,766. Finally, in December the OBFS had 184-member field stations and 25 individual members. The general membership will be asked to vote on the proposed 2022 budget. Turning first to revenues, the proposed 2022 revenues—dues, donations, dividends, and auction proceeds—are conservatively estimated to be \$45,000. Traditional expense categories (bank & transaction fees, website management, administration, etc.) are relatively level funded, totaling \$19,500. Annual meeting costs assume that people will be able to travel freely and were budgeted to be \$15,000.

This is the first year that the OBFS Board proposes to spend funds on Strategic Plan initiatives, creating a substantial change in the proposed 2022 budget. The Strategic Plan is a 5-year initiative, whose projects are expected to be funded internally by OBFS and through grants. Estimated costs of the strategic plan initiatives are highest in Year 1 and for those internally funded initiatives first year costs were estimated to be \$75 - \$140K. Each year after that the costs were \$27 - \$30K (or \$108-\$120K for the following four years). Money to fund initiatives in the first year will come from either the credit union account or the money market fund. The inclusion of the Strategic Plan initiatives creates an estimated operating cost of \$121,800, with a budget deficit of \$86,800 in the proposed 2022 budget. These expenses were anticipated by the Board and will be financed with donations and investment earnings from the past 12 years.

## OBFS ANNUAL REPORT 2021

The costliest initiatives include the *OBFS website redesign* (\$40,000), an *International Committee* program of matching two stations with each other to encourage idea and training exchange (\$20,000), and the IDEA+ (*Inclusion, Diversity, Equity, Accessibility*) Committee's interest in inviting speakers to the annual meeting and a virtual workshop (\$12,500).

Please send any budget questions to Paul Wetzel [pwetzel@smith.edu; 413.268.3115], I am happy to answer them.

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### AUDIT 2020

To: Chris Lorentz, OBFS President  
FROM: Brett Biebuyck, OBFS Vice President  
CC: Paul Wetzel, OBFS Treasurer  
RE: 2020 OBFS Audit

In my role as Vice President, I am charged with conducting an informal audit of the financial statements of the organization. This year I examined the materials provided by the OBFS Treasurer, Paul Wetzel. All materials are organized by month in the OBFS Dropbox folder.

These virtual folders contain, and I have examined the following:

- Monthly Statements from Jefferson Bank and Trust
- Monthly Statements from UMassFIVE College Federal Credit Union
- Monthly Statements from Vanguard Investment Company
- Monthly Statement from Payscape
- Copies of checks received by OBFS
- Copies of receipts for reimbursement of individuals
- Invoices paid by OBFS

### My comments

- The records are very well kept, comprehensive, and organized.
- I found no examples of improper transactions.
- Mostly associated with the meeting in Belgium in 2019, there were a significant amount of international transactions in 2020. These brought the added complexities of currency conversions, language translation, and complicated international bank transfers
- The Jefferson Bank and Trust account was closed in March and funds transferred to UMassFive College Federal Credit Union
- The organization has significant resources in liquid accounts.
- The investment funds grew considerably over the year

Respectfully Submitted by the OBFS Vice President, Brett Biebuyck on March 10, 2021.

# OBFS ANNUAL REPORT 2021

General Budget Categories	2017-18 Budget Actuals	2018-19 Budget Actuals	2019 Sept.-Dec. Budget Actuals	2020 Budget Actuals	2021 Budget Actuals	2022 Budget Projections
<b>I. Income:</b>						
Membership dues	33,450	42,495	21,550	37,750	<b>37,200</b>	33,000
Investment dividends, capital gains, and interest	4,990	5,999	3,575	4,864	<b>3,393</b>	3,000
Auction (revenue goes to restricted fund)	10,566	11,449	8,362	8,890	<b>8,145</b>	7,000
Development event revenue	0	(1,045)	0	0	<b>0</b>	0
Donations	4,200	0	1,200	2,714	<b>2,260</b>	2,000
<b>Total Income:</b>	<b>53,205</b>	<b>58,898</b>	<b>34,687</b>	<b>54,218</b>	<b>50,998</b>	<b>45,000</b>
<b>Total Operating Income</b>	<b>37,718</b>	<b>41,496</b>	<b>22,750</b>	<b>40,464</b>	<b>39,460</b>	<b>35,000</b>
<b>II. Expenses:</b>						
Organization Membership Dues	5,400	0	0	2,700	<b>2,700</b>	3,000
Bank and transaction expenses	2,176	2,155	446	2,323	<b>2,296</b>	2,300
Travel (CVD, Awards, AIBS collaborations, contingencies, etc.)	10,412	13,841	0	1,602	<b>1,630</b>	5,000
Administration (Fees, Postage, etc.)	317	403	116	546	<b>552</b>	500
Communications & Outreach (ESA Booth, newsletter, etc.)	0	5,650	0	3,466	<b>3,166</b>	4,000
Website and data management	5,625	5,540	1,806	9,231	<b>4,862</b>	5,000
Strategic Plan--Year 1						
<b>Collaborations Committee</b> -- professional development    Includes comprehensive member survey (\$2,500)						7,500
<b>Development Committee</b> -- In-person fundraising event at annual meeting on Beaver Island, Michigan						4,000
<b>Governance Committee</b> -- New board member orientation						500
<b>IDEA+ Committee</b> -- Speaker fees for annual meeting and a workshop						12,500
<b>International Committee</b> -- Station matching program travel expenses						20,000
<b>Member Support/Services Committee</b> -- Website overhaul						40,000
Annual Meeting (travel & contingency)	3,846	259	3,989	9,773	<b>8,256</b>	15,000
Contingency (2.0%)	0	0	0	0	<b>0</b>	2,500
<b>Operating Expense Total</b>	<b>27,776</b>	<b>27,849</b>	<b>6,357</b>	<b>29,640</b>	<b>23,134</b>	<b>121,800</b>
<b>Expense Variance (Operating Income-expenses)</b>	<b>9,942</b>	<b>13,647</b>	<b>16,393</b>	<b>10,824</b>	<b>16,326</b>	<b>(86,800)</b>
<b>III. Assets</b>						
Vanguard Social Investment Fund	364,518	391,266	435,897	277,202	<b>365,794</b>	
Vanguard Federal Money Mkt Fund	3,253	3,321	3,346	235,283	<b>235,307</b>	
Jefferson Bank & Trust (account closed March 2020)	39,286	47,607	—	—	—	
UMASS Five College FCU (account opened 5 April 2019)	—	39,574	44,162	118,615	<b>136,665</b>	
<b>Total Net Assets</b>	<b>407,058</b>	<b>481,767</b>	<b>483,405</b>	<b>631,100</b>	<b>737,766</b>	
<b>IV. Miscellaneous</b>						
Total Number of Field Station Members	218	207	—	210	<b>184</b>	
Total Number of Individual Members	34	33	—	33	<b>25</b>	
Amount of money invested into Vanguard Social Investment Fund in 2021					<b>\$9,600</b>	
Final Amount of Annual Auction Proceeds (some auction money deposited in 2022)					<b>\$9,295</b>	

Auction results 2007 through 2021 [earlier years available upon request]

Year	Amount	Annual Meeting Location
2007	\$ 6,793	Llano River Field Station
2008	\$ 6,327	Black Rock Forest
2009	\$ 4,722	La Selva Biological Station
2010	\$ 8,113	U. of Michigan Biological Station
2011	\$ 7,430	Bodega Marine Lab and Reserve
2012	\$ 9,382	Archbold Biological Station
2013	\$ 9,082	Southwest Research Station
2014	\$ 11,025	Woods Hole
2015	\$ 12,631	Rocky Mountain Biological Laboratory
2016	\$ 7,188	Sitka Sound Science Center
2017	\$ 10,565	Itasca Biological Station
2018	\$ 11,449	Schoodic Institute at Acadia Park
2019	\$ 8,362	Hasselt University Field Research Centre in Belgium
2020	\$ 8,890	Virtually Online at Flathead Lake Biological Station
2021	\$ 9,295	Virtually Online at Flathead Lake Biological Station

**The 2022 OBFS Annual Meeting** will be held at Central Michigan University's Biological Station on Beaver Island (in the middle of Lake Michigan) (<https://www.cmich.edu/colleges/se/cmubs/pages/default.aspx>)



*Organization of Biological Field Stations*

*Annual Report 2021*