

Organization of Biological Field Stations

Strategic Plan 2005-2010



ORGANIZATION OF BIOLOGICAL FIELD STATIONS

obfs.org

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Executive Summary

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

In 2005 OBFS adopted a Strategic Plan to focus its activities for the next ten years. The plan lists seven goals with associated tasks. Implementation of the goals will be the responsibility of seven Task Forces. The goals and summarized tasks are as follows:

Goal One: “Conduct the business of OBFS to ensure responsible and transparent management.”

Tasks:

1. Follow the norms of nonprofit operation.
2. Make the organization transparent, inclusive and open to members' input.
3. Conduct the business of OBFS as publicly as possible.
4. Develop and recommend implementation of a business plan for OBFS.
5. Develop and recommend implementation of a fundraising plan for OBFS.
6. Develop a process to review the Strategic Plan every five years.
7. Encourage diversity of leadership.
8. Recommend the adoption of a revised budget procedure.
9. Continue to develop and maintain a versatile and informative OBFS web site.
10. Recommend an internal mechanism to approve official OBFS responses.
11. Increase OBFS membership.
12. Consider recommending the use of easy standardized report forms.

Responsibility: *Business Task Force*

Goal Two: “Provide opportunities for informal networking, mentoring and problem-solving within OBFS.”

Tasks:

1. Acknowledge and respect the importance of the OBFS Annual Meeting to members and ensure its continued significance.
2. Reduce the amount of time spent on OBFS business at the annual meeting.
3. Maintain and formalize the importance of personal interactions at the annual meeting.
4. Increase the information content of the annual meeting

5. Provide recommendations regarding the annual meeting to the Program Committee.
 6. Create an informal interactive web forum.
- Responsibility: *Internal Relations Task Force*

Goal Three: “Provide services and resources that will improve field stations and marine laboratories.”

Tasks:

1. Keep the OBFS Operations Manual current and relevant.
 2. Seek to understand how OBFS can better support the needs of member stations.
 3. Use the OBFS web site to provide various types of pertinent information.
 4. Use the OBFS web site for promoting field courses; include a link to a video clip to promote value of field experiences.
 5. Develop support material for member stations to use with sponsoring institutions.
 6. Encourage the use of standard sampling methods by member stations.
 7. Expand advanced technology and database training opportunities for members.
 8. Provide training for OBFS members in non-technical administrative issues.
 9. Seek funding to host regional workshops for field station planning.
- Responsibility: *Member Support Task Force*

Goal Four: “Strive to increase diversity within the OBFS membership and at member stations.”

Tasks:

1. Promote recruitment of underrepresented minorities at member stations.
 2. Expand the cultural representation of OBFS members.
 3. Develop partnerships and collaborations with minority scientific organizations and minority-serving colleges and universities.
 4. Explore ways to assist minority-serving colleges and universities establish field stations.
- Responsibility: *Diversity Task Force*

Goal Five: “Promote cooperation and collaboration among OBFS members, and with broader education and research initiatives.”

Tasks:

1. Promote the establishment of research networks among OBFS members.
2. Promote opportunities for cooperative efforts in field science education and training.
3. Assist with the development of consortia among OBFS members.

4. Encourage the sharing of databases, personnel lists, etc. via the OBFS web site.
 5. Encourage NSF to fund programs that support collaboration.
- Responsibility: *Networking Task Force*

Goal Six: “*Strive to increase financial resources for field facilities and for field-based science, education and outreach*”.

Tasks:

1. Work with NSF to expand the Field Station and Marine Laboratory competition.
2. Work with public funding agencies to develop new or enhance existing funding sources.
3. Explore opportunities for funding from private foundations and organizations.
4. Collaborate with organizations that have overlapping interests.

Responsibility: *Development Task Force*

Goal Seven: “*Strive to create a broad-based constituency with a vested interest in the success of OBFS and member stations.*”

Tasks:

1. Identify and develop strategies tailored for different constituencies.
2. Create an archive of success stories to promote the value of field stations.
3. Carefully coordinate publicity materials to communicate a professional OBFS image.
4. Explore media outreach opportunities.
5. Promote interactions between OBFS members and policy makers.
6. Assist members to organize short science courses for elected officials and judiciary.

Responsibility: *Outreach Task Force*

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A. Introduction

The Organization of Biological Field Stations (OBFS) was founded in 1967 to provide a forum where the directors of field stations could share common interests and concerns. The concept was clearly a viable one, and over the years membership has grown to more than 180 field stations and marine labs (FSMLs). A directory of FSMLs can be found on the OBFS web page <obfs.org>. OBFS is also open to anyone who supports the functions and values of FSMLs, and about 40 people currently hold individual memberships. OBFS defines a field station as a facility engaged in field research and/or instructional programs of biological or related phenomenon. At present, OBFS remains a volunteer-run organization.

OBFS member stations have a proud history of supporting excellent terrestrial, aquatic and marine research and education programs. Several FSMLs are approaching or have passed their 100th anniversary of establishment, and many currently address national issues such as global warming and declines in species diversity. FSMLs have repeatedly demonstrated their importance in providing knowledge that informs national debates about environmental issues and natural resource management. In addition, the rich legacies of data at many FSMLs are increasingly looked upon as a national resource. OBFS recognizes the importance of FSMLs to the Nation's infrastructure for research and education.

FSMLs also play critical roles in enhancing stewardship of our natural resources, by managing protected areas at or near the stations and by providing natural outdoor laboratories for research and education. The properties managed by FSMLs often serve as demonstration areas or as examples of natural conditions for their representative ecosystems, and frequently serve as refugia that help protect native biodiversity. FSMLs further enhance stewardship by being direct sources of information to promote development of a more scientifically literate society.

The purpose of this strategic plan is to help guide the development of OBFS so that it can improve services to member FSMLs in ways that facilitate their research and education programs resulting in benefits to society. OBFS has been involved in several previous planning efforts, but these have had relatively narrow objectives such as improving data management and analysis at field stations, or developing networks for research or education. They have not addressed the specific roles, responsibilities or functions of the Organization itself as does this Strategic Plan. Some examples of prior planning efforts are described below.

In 1995, Lohr et al. published the results of a network-planning workshop jointly conducted by OBFS and the National Association of Marine Labs, ***A New Horizon for Biological Field Stations and Marine Laboratories***. The report summarized the critical demand for field facilities, the role field facilities play in

the national scientific research and educational agenda, and suggestions for meeting future field facility needs. In the intervening years, important progress has been made. NSF's special competition for facilities and equipment for FSMLs, has responded to opportunities highlighted in the "*New Horizons*" report and the impact on planning efforts by individual stations has been particularly noticeable.

Facilitating networks among member institutions of the Organization of Biological Field Stations and with Long-Term Ecological Research (LTER) sites has become a high priority for OBFS. An OBFS workshop was held in May 1998 at the National Center for Ecosystem Analysis and Synthesis in Santa Barbara, CA to focus on the steps needed to organize a functioning network of biological field stations. The resulting report, ***Field Station 2000 Initiative*** (Stanford and McKee 1999), helped create a staff liaison position with the LTER Network Office that promotes networking among OBFS member stations via activities such as: offering workshops on GIS and data management that include QA/QC and archiving procedures; advising on personnel, hardware and software needs; and promoting standardized field protocols.

OBFS has also been active in developing a national-level role for FSMLs in education. Drs. Klug (Kellogg Biological Station), Hodder (Oregon Institute of Marine Biology) and Swain (Archbold Biological Station) convened a national workshop, ***Education and Recruitment into the Biological Sciences: Potential Role of Field Station and Marine Laboratories*** in Washington, D.C. on February 11-12, 2002. The resulting report is available on the OBFS web page <obfs.org/ed>, and emphasizes the multiplicity of educational roles that FSMLs can play. It also stresses the value of FSMLs as sites for hands-on, experiential education by virtue of student emersion in the subject matter -- the natural world.

Members of OBFS have also led the two FIRST (Faculty Institutes for Reforming Science Teaching) NSF awards which are educational grants that mix teams of scientists with undergraduate faculty at FSMLs where they learn how to better integrate teaching into their overall professional culture. Participants learn new methods of instruction to improve their teaching skills and develop regional support systems among their peers that they can call upon for assistance. These programs clearly demonstrate the power of consortia among FSMLs for research and education.

A basic objective of OBFS is to advance understanding of the natural world through field-based science and education. Through our annual meetings, OBFS fosters networking and provides support to member stations to promote research and education that advance that understanding. In recent years, however, it became apparent that OBFS could do more for its member stations, and in addition to the workshops mentioned above, OBFS has helped to organize

congressional visits and policy workshops in collaboration with the American Institute of Biological Sciences (AIBS).

OBFS has also organized as a single voice to help inform members of Congress about the importance of increasing the competitive funding for field research provided by the National Science Foundation; and it has collectively supported the formation of a National Ecological Observatory Network (NEON), currently in development.

This Strategic Plan is offered as a tool to help guide future activities of OBFS so that it can better serve member stations in their many roles as field stations and marine labs.

B. Planning Process

This Strategic Plan began at the 2002 Annual Meeting of OBFS at the Kellogg Biological Station when the members discussed the need for a strategic plan and voted to develop one. Necessary tasks for completing the strategic plan were identified: 1) define the mission and vision of the OBFS, 2) identify goals and objectives to be accomplished, 3) prioritize the goals in a 10-year horizon, 4) attach cost figures, and 5) suggest strategies for accomplishing the goals within the time and budget. Eric Nagy and Arthur McKee were selected as Co-PIs, and Susan Lohr as the planning facilitator. The following bulleted list traces the history of the planning process in outline form.

Timeline of development of the Strategic Plan:

- February 2003 - A proposal "FSML: Request to Support a Strategic Planning Workshop for the Organization of Biological Field Stations" was submitted to NSF (PIs: E. Nagy, A. McKee and S. Lohr).
- August 2003 - NSF awarded the planning grant (DBI 0328361) for \$42,768.
- September 2003 - A Survey for the OBFS Strategic Plan was widely circulated electronically during the entire month. Responses were received from 268 individuals.
- September 2003 - Two, two-hour sessions were held at the OBFS Annual Meeting, Kananaskis Field Station, September 11-13. Sixty-five participants discussed a 10-year vision for OBFS, and made suggestions for a possible mission statement. The group agreed upon 18 prioritized goals for OBFS.
- January 6-18, 2004 - An electronic forum was convened to discuss the mission, goals and vision of OBFS. More than 99 participants signed up to offer comments and suggestions. Specific discussions took place in five subgroups: Organizational Resources/External; Organizational Resources/Internal; Education/Field Courses/Educators; Research Priorities; and Opportunities/International Role of OBFS. Results were collated and summarized for the subsequent planning meeting.

- January 23-25, 2004 - The Strategic Planning Workshop convened at the Sevilleta Field Research Station of the University of New Mexico. Twenty participants (Appendix 1.D.) refined the progress made by the previous efforts. The 18 goals from the Kananaskis meeting were narrowed to 12 and conceptually classified as either External Relations or Internal Relations. The goals were prioritized, and specific tasks and responsibilities were developed for each goal. Changes in the OBFS organizational structure were discussed and consensus was achieved on an approach designed to strengthen the committee structure by associating specific committees with specific organizational goals. A working mission statement was unanimously supported, for consideration by the OBFS membership at the 2004 annual meeting.
- July 2004 - A draft of the OBFS Strategic Plan was provided for review to the workshop participants, the OBFS Executive Board, and the entire membership via email and the website. Comments and edits were incorporated into a draft presented at the annual meeting for discussion.
- August 2004 – A draft was circulated to a group of reviewers outside of the organization.
- September 2004 - Annual meeting, Shoals Marine Lab, a draft plan was presented to the membership for review. Discussions indicated that the OBFS membership felt that further review was needed, as well as a different format and organization.
- September 2004 to April 2005 - President of OBFS, Sedra Shapiro, with Executive Board support appointed a Special Review Committee (Appendix 1.E.) to review the strategic plan and long-range priorities for OBFS with guidance from Cynthia Carson, a strategic planning consultant. This group produced a revised draft plan.
- April 2005 - The PIs for the NSF planning grant (Nagy, McKee and Lohr) met at Ridgway, CO for three days (16-18 April) to edit the draft strategic plan produced by the Special Review Committee and to prepare a draft for consideration by the OBFS Executive Board.
- May - June 2005 – Final reviews conducted by the Special Review Committee and Executive Board.
- June 2005 – Membership review and comment period.
- August 2005 – Review by membership.
- September 12, 2005 – Plan adopted by membership vote.
- September 2005 – Plan presented to the OBFS Annual Meeting.

As detailed above, this Strategic Plan is the result of discussions at annual meetings, distillation and synthesis of questionnaires by committees, planning workshops to help organize the input from OBFS members including a virtual workshop using the web, external review, and reviews by the Executive Board, the membership and a Special Review Committee. From the beginning, the planning process has been transparent and open with input encouraged and a variety of ways used to test and rank priorities among the many ideas proposed.

The breadth and creativity of the suggestions received clearly indicates a sincere effort by members to improve OBFS.

The goals listed in the Strategic Plan represent those items in the overall vision that were consistently assigned the highest priority during the many reviews in the planning process. They are a small subset of all the ideas, and clearly have high currency with the membership. All of the ideas, all the hopes and dreams suggested have been catalogued and archived to ensure that none are lost and to help guide the next iteration of a Strategic Plan (OBFS web page: Strategic Plan). They will form a valuable resource.

While many taxonomies of goals are possible, the system used in this Strategic Plan was organized and the goals and tasks worded to try and capture the language most commonly used in the planning discussions and the apparent intent of the concepts behind each goal. A great deal of responsibility is left to the different task forces to design ways to achieve those goals. The intent is to maintain the openness of the process and foster the participatory spirit so evident within OBFS.

C. Mission, Vision and Core Values

Mission:

The mission of OBFS is to serve the member stations in ways that increase their effectiveness in research, education and outreach.

Vision:

OBFS will achieve its mission by:

- facilitating the highest quality environment for scientists, students, teachers and the public to pursue research and education, and to enhance biological and environmental understanding,
- assisting its members to provide optimal infrastructure for exemplary scientific research, innovative and effective learning, and informed natural resource stewardship,
- enhancing capacity of FSMLs through training and information sharing,
- educating the public and decision-makers about the critical role of field stations in research and education,
- enhancing public support for funding field station infrastructure and the activities supported at field stations, and
- conducting its business responsibly and transparently.

Core Values:

Core values are the ethical standards by which an organization makes decisions, sets priorities and achieves objectives. The core values of OBFS are *diversity, inclusiveness, sustainability and transparency.*

Diversity:

In all of its activities, OBFS will strive to increase the participation of individuals from groups currently underrepresented in the field sciences, in order to better reflect the diversity of the general population and increase their exposure to field-based inquiry. OBFS recognizes that a scientifically literate and involved populace that reflects the human diversity of our society is an investment in the continued success and importance of field sciences in general, and OBFS in particular.

Inclusiveness:

OBFS welcomes all field stations and marine laboratories as members, and also any interested individuals. OBFS will strive to create an atmosphere in which everyone feels welcome, heard and valued in the Organization.

Sustainability:

OBFS will engage in activities that promote the long-term viability of programs and facilities at its member stations. To be sustainable over time, practices will be encouraged that are comprehensive, sophisticated and well conceived in order to minimize environmental impacts and not compromise the research, education, and outreach missions of field stations.

Transparency:

The business of OBFS will be conducted in a manner that is open and accessible to its members. Transparency in governance fosters trust and encourages participation.

These core values become integral parts of the goals listed below, helping clarify targets to be achieved and offering guidance when planning and executing tasks.

D. Goals, Tasks and Responsibilities**Summary List of Goals:**

1. Conduct the business of OBFS to ensure responsible and transparent management.
2. Provide opportunities for informal networking, mentoring and problem solving within OBFS.
3. Provide services and resources that will improve field stations and marine laboratories.

4. Strive to increase diversity within the OBFS membership and at member stations.
5. Promote cooperation and collaboration among OBFS members, and with broader education and research initiatives.
6. Strive to increase financial resources for field facilities, and for field science, education and outreach.
7. Strive to create a broad-based constituency with a vested interest in the success of OBFS and member stations.

Implementation of Goals:

Each goal will be the responsibility of a Task Force. Task Force members don't necessarily need to conduct the tasks themselves, but they should seek out and engage the expertise necessary to accomplish each task. Task Forces can be as large or as small as there are interested members to participate. Each Task Force will determine how it wishes to go about addressing its tasks. Task Forces will report on their activities in writing on the OBFS web site at least once during the year, and will meet briefly at the annual meeting. Their progress reports and future plans will be briefly discussed during the annual meeting business sessions.

Members interested in serving as Task Force Chairs for a one-year term will submit a statement of interest to the Executive Board before or at the annual meeting. The Executive Board will discuss the list of interested members in a public meeting, will solicit audience comments, and then will vote by private ballot. Chairs will be appointed anew each year, with no expectation of automatic reappointment. If circumstances are such that the appointment of Task Force Chairs cannot happen at an annual meeting, the Executive Board can make the appointments via email.

The Task Forces replace most existing OBFS committees, except for the Nominating, Program, and Investment Committees and the Executive Board. The seven Task Forces are ***Business, Internal Relations, Member Support, Diversity, Networking, Development, and Outreach.***

The tasks within each goal below are prioritized according to comments obtained from the membership during the planning process. Many received similar "rankings" making any precise ordering impossible, and closely ranked tasks appear next to each other. Task Forces might well want to consider grouping these tasks into short-term, mid-term and long-term efforts.

Circumstances, opportunities and resources can and will change and so the priority order should be viewed as flexible. Each Task Force assumes the responsibility to periodically reassess the priorities to ensure that OBFS addresses those tasks that will best serve the member stations.

Goal One:

“Conduct the business of OBFS to ensure responsible and transparent management.”

Tasks:

1. Follow the norms of nonprofit operation. Develop Financial Policy and Investment Policy documents for organizational approval and implementation. Develop formal job descriptions for officers (Executive Board) and for business committees (Nominating, Investment and Program). Investigate requiring a biannual external audit in order to meet the standards of potential future foundation donors. Examine the bylaws to identify changes needed to implement the OBFS Strategic Plan.
2. Make the organization transparent, inclusive and open to members' input. Create regular opportunities for feedback regarding how well OBFS is serving the membership at or immediately after the annual meeting, and interactively on the web site. Carefully examine how to improve the transparency and inclusiveness of OBFS.
3. Conduct the business of OBFS as publicly as possible. In the interest of transparency and inclusiveness, consider recommending that the Executive Board follow public open meeting standards (“Sunshine Laws”). Members would be welcome to sit in quietly on Executive Board meetings but they couldn’t vote. There would be a limited time for audience input before votes are taken.
4. Develop and recommend implementation of a business plan for OBFS.
5. Develop and recommend implementation of a fundraising plan for OBFS that supports the objectives of the Strategic Plan.
6. Develop a process to review the Strategic Plan every five years and make appropriate revisions.
7. Encourage the Nominating Committee to consider diversity of leadership in their recommendations.
8. Recommend the adoption of a revised budget procedure that involves enough time for careful deliberation. One possible process might be: “Budget requests will be submitted to the OBFS Treasurer by members, Task Forces or Committees in writing at least one month before the annual meeting. The budget will be posted on the web site and will be provided to the attending membership in the annual meeting packet. Budget approval will be requested by the presiding officer at the last business meeting session after one or more opportunities for unhurried discussion by the members present. Exceptions to this process can be approved by the Executive Board.”
9. Continue to develop and maintain a versatile and informative OBFS web site to serve as the key organizational communication tool.

10. Recommend an internal mechanism to approve official OBFS responses to papers, reports, regulatory or legislative activities that directly impact the future of field science or education.
11. Increase OBFS membership by recruiting facilities and sites that are not yet members. Encourage people interested in field stations and marine laboratories to join OBFS as individual members.
12. Consider recommending that Task Forces, Committees or any other entities conducting business on behalf of OBFS use easy standardized report forms that are submitted to the OBFS web site.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Business Task Force***.

Goal Two:

“Provide opportunities for informal networking, mentoring and problem-solving within OBFS.”

Tasks:

1. Acknowledge and respect the substantial importance of the OBFS Annual Meeting to members and ensure its continued significance. Brainstorm how it can keep its special charm and still give members a personally and professionally rewarding experience.
2. Reduce the amount of time spent on OBFS business at the annual meeting by making business communications more efficient and conducting as much business as possible through electronic or print communication before the meeting. Use report forms for summarizing the progress of the seven Task Forces or the OBFS business committees.
3. Maintain and formalize the importance of personal interactions at the annual meeting. Ensure that there are ample social events that facilitate open and friendly interactions (e.g. facility tours).
4. Increase the information content of the annual meeting by such methods as developing a meeting theme, or resurrecting panels that address specific “nuts and bolts” topics. In the past panels have covered insurance and liability, public programs, facility maintenance, solar or alternative energy, “green” construction, and declining course enrolment.
5. Provide recommendations regarding the annual meeting to the Program Committee.
6. Create an informal interactive web forum. Invite outside experts to participate in web discussions.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Internal Relations Task Force***.

Goal Three:

“Provide services and resources that will improve field stations and marine laboratories.”

Tasks:

1. Keep the OBFS Operations Manual current and relevant via online database–style elements and regular reviews. Consider adding additional components such as guidelines for station newsletters, or how to form and manage a “Friends of” group. Seek funding, perhaps through NSF, to maximize the utility of the manual.
2. Develop protocols to better understand how OBFS can support the needs of member stations. Conduct surveys, poll members at annual meetings, etc.
3. Use the OBFS web site to provide information that is periodically reviewed and updated on important topics such as NSF support for research and education, interesting or new technologies, diversity recruitment, and public relations.
4. Use the OBFS web site for promoting field courses. Continue to list courses available at member stations. Develop a short video clip that provides an attractive general introduction to field studies, with links to summer field courses at member stations.
5. Develop support material for member stations to use with sponsoring institutions and other venues that illustrates the importance, relevance and credibility of field stations and marine laboratories. Material might summarize information such as how field facilities are funded, or the numbers of persons enrolled in a variety of field facility programs.
6. Encourage the use by member stations of Long-Term Ecological Network (LTER) or National Ecological Observatory Network (NEON) standard sampling methods to facilitate large-scale biodiversity and environmental monitoring.
7. Expand advanced technology and database training opportunities for members, building on those currently provided to OBFS by the LTER network office.
8. Provide training for OBFS members in fundraising, legislative outreach, business planning, and other non-technical managerial and administrative issues.
9. Seek funding to host regional meetings for OBFS member stations that provide two-day intensive workshops for field station planning. Topics to be covered include strategic, master, academic, facility, resource stewardship and financial plans.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Member Support Task Force***.

Goal Four:

“Strive to increase diversity within the OBFS membership and at member stations.”

Tasks:

1. Promote recruitment of underrepresented minorities at member stations.
2. Expand the cultural representation of OBFS members.
3. Develop partnerships and collaborations with minority scientific organizations such as: American Indian Scientists and Engineers; Society for Advancement of Chicanos and Native Americans in Science; Beta Kappa Chi; and with all minority-serving institutions including those listed as Historically Black Colleges and Universities, Hispanic Association of Colleges and Universities, and Tribal Colleges.
4. Explore ways to assist minority-serving colleges and universities establish field stations.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Diversity Task Force***.

Goal Five:

“Promote cooperation and collaboration among OBFS members, and with broader education and research initiatives.”

Tasks:

1. Promote the establishment of research networks among OBFS members.
2. Promote opportunities for cooperative efforts in field science education and training, such as the “Frontiers in Instructional Resources for Science Teachers” (FIRST) program.
3. Assist with the development of consortia among OBFS members.
4. Encourage the sharing of databases, data registries, personnel lists, bibliographies, site characteristics and capabilities, education offerings, etc. via the OBFS web site.
5. Encourage NSF to fund programs that support collaboration. Collaborative studies in ecology have become common because of an appreciation of the complexity of problems being addressed. The geographic spread of FSMLs creates opportunities for research and educational projects that encompass a wide range of biomes and conditions.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Networking Task Force***.

Goal Six:

“Strive to increase financial resources for field facilities and for field-based science, education and outreach”.

Tasks:

1. Work directly with NSF to maintain and expand the Field Station and Marine Laboratory competition.
2. Work with funding agencies to develop new or enhance existing funding sources.
3. Explore opportunities for funding from private foundations and other non-governmental organizations.
4. Collaborate with organizations that have overlapping interests, such as the Ecological Society of America, the American Institute for Biological Sciences, the Association of Ecosystem Research Centers and the National Association of Marine Laboratories.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Development Task Force***.

Goal Seven:

“Strive to create a broad-based constituency with a vested interest in the success of OBFS and member stations.”

Tasks:

1. Identify separate constituencies and develop strategies to win their support for OBFS. For example, a strategy targeting federal legislators and resource agencies might include (1) visits to Congressional offices with well known scientists, supporters from the Congressperson's district, and field station managers with experience relating to a currently relevant “hot topic”, or (2) sponsoring a Congressional briefing during lunch, with a video about OBFS facilities and a presentation regarding one or two currently relevant research topics of interest to Congressional members and staff.
2. Create an archive of success stories that can be used to promote the value of field stations. Canvass member stations to assemble a database of contributions to science and society, including examples of successful research and educational programs.
3. Carefully coordinate publicity materials that include an OBFS brochure, the OBFS display, organizational letterhead, etc. that communicate a professional and uniform image for OBFS.
4. Explore media outreach opportunities in newspapers, radio, television, print and electronic magazines, etc.

5. Promote interactions between OBFS member stations and natural resource managers and policy makers at regional, state, and national levels. Promote more agency use of field stations and marine laboratories.
6. Assist member stations to organize field science short courses for elected officials and judiciary.

Responsibility: Addressing these tasks within the next five years is the responsibility of the ***Outreach Task Force***.

E. Conclusion

OBFS has an admirable history of supporting its members in their individual missions and in facilitating networking and cooperative opportunities among field stations and marine laboratories across North America. The purpose of this Strategic Plan is to help focus the Organization's efforts and long term aspirations. It is important that the proposed Goals and Tasks be regarded as suggestions for the organization to work with and apply as its members see fit, and as demands and opportunities arise. The Plan should not be interpreted as a strict road map or contract directing and restricting organizational activity. And while the Goals and Tasks are laid out in very explicit terms, this is for clarity of vision and intent, not to serve as a rigid checklist.

Throughout the planning process the project leaders and the OBFS Executive Board worked to maximize membership participation and to create multiple opportunities for member contribution and review. The recommendations and strategies contained in the Strategic Plan were generated by the OBFS membership, past and present OBFS leaders, non-OBFS scientists, experts in policy, education, research, and facilities, and leaders of similar organizations. The suggested goals and tasks are the products of an iterative process of consensus building with many opportunities for input and discussion by OBFS members.

The Strategic Plan is ambitious, and is the summary and distillation of many worthwhile ideas. Great care was made to include, in some form, all the goals and tasks that received strong support during the planning process.

The tasks within each goal were prioritized according to comments obtained from the membership during the planning process. Circumstances, opportunities and resources can and will change and so the priority order should be viewed as flexible. Each Task Force assumes the responsibility to periodically reassess the priorities to ensure that OBFS addresses those tasks that will best serve the member stations.

The overall goal of this planning process is to provide OBFS with a plan that reflects the current vision of the membership including strategies to help guide future development of the organization. The editors and major participants feel confident that the Strategic Plan is comprehensive, that it addresses most of the needs and opportunities for the next ten years, and that it reflects fairly the diversity of ideas and wisdom found within OBFS.

The Strategic Plan will be a success if it serves as a rich source of ideas for OBFS members and leaders, and helps guide projects and initiatives within the organization that will benefit the member institutions as they address their own goals and missions.

F. Literature Cited

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G. Appendices

- Appendix 1. Planning Participants
- Appendix 2. Proposed OBFS Organization Chart
- Appendix 3. Acknowledgements

Appendix 1. Planning Participants.

A. 268 OBFS members and non-members contributed valuable input to the September 2003 survey.

B. OBFS Annual Meeting participants 2003 and 2004.

C. 99 OBFS members participated in the January 2004 “E-Forum.”

D. Participants, OBFS Strategic Planning Workshop, Sevilleta Field Research Station, NM January 23-25, 2004:

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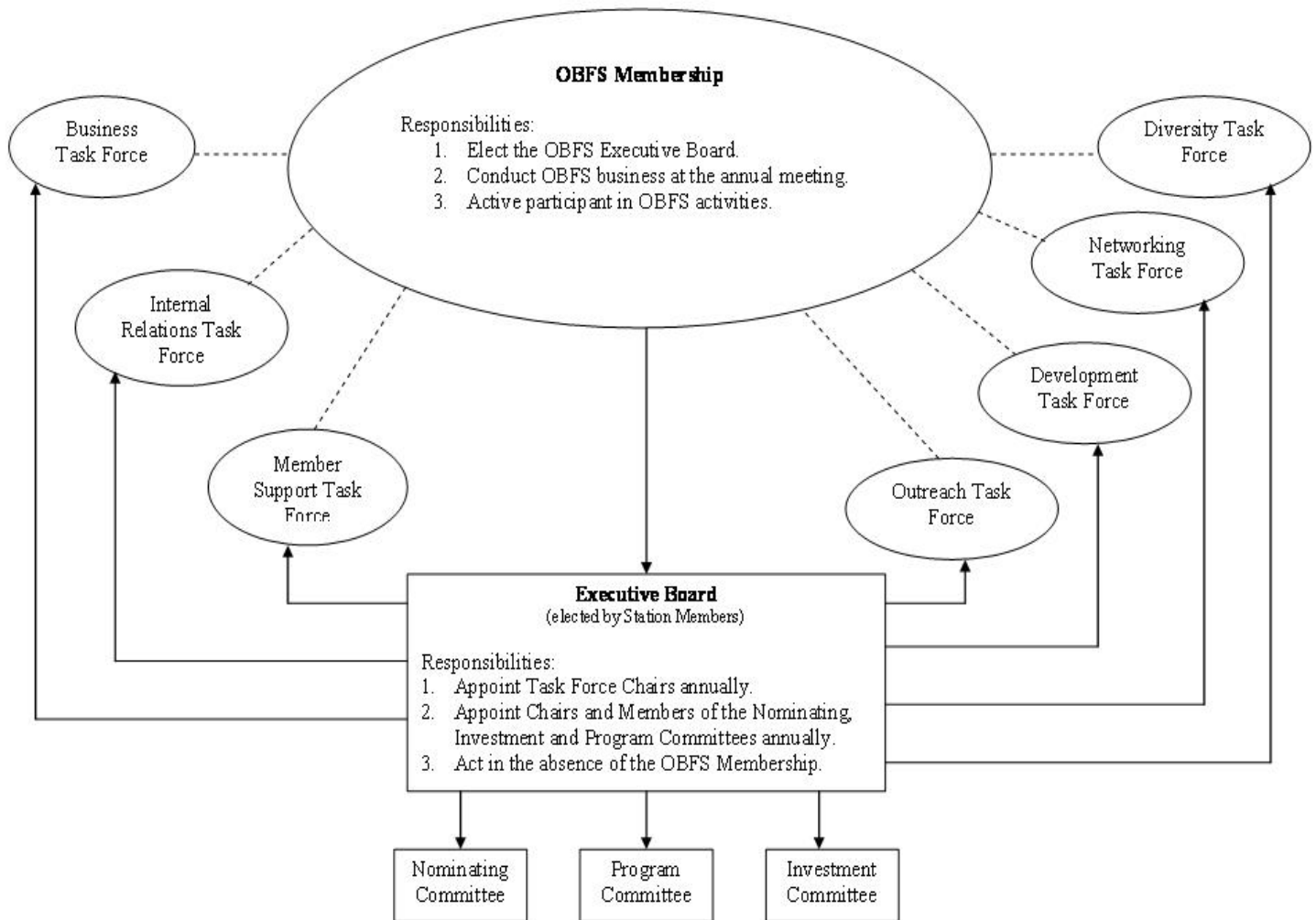
F. Executive Board Members (2002 to 2005):

President: Eric Nagy (02-04); Sedra Shapiro (04-06)
Vice President: Philippe Cohen (02-04); Robert Wyatt (04-06)

Member at Large 1: Sedra Shapiro (01-03); Beth Cline (03-05), Amy Whipple (05-07)
Member at Large 2: Steve Tonsor/Nina Consolatti (02-04); Larry Weider (04-06)
Secretary/Treasurer: Claudia Luke (02-06)
Editor: Dave White (01-07)
Network Coordinator: Mark Stromberg (01-07)
Past President: Hilary Swain (02-04); Eric Nagy (04-06)

G. Principal Investigators, National Science Foundation Grant No. DBI-0328361:
Eric Nagy, University of Virginia
Art McKee, Flathead Lake Biological Station, University of Montana
Susan Lohr, Lohr Associates

Appendix 2. Proposed OBFS Organization Chart (subject to existing Bylaws and ongoing modification by the membership).



Appendix 3. Acknowledgements.

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