



OBFS Annual Report 2023

Report developed by Beth Norman: (OBFS Secretary), September, 2025

Edited by Jessica Malisch (OBFS Vice President)

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2023 OBFS Board of Directors

President	Lara Roketenetz	Annual Meeting Committee Co-Chairs	Skip Van Bloem Tom Bansak
Past President	Chris Lorentz	Membership Committee Chair	Paul Wetzel
Vice President	Skip Van Bloem	Development Committee Co-Chairs	Brian Kloeppe Sarah Oktay
Treasurer	Paul Wetzel	Governance and Sustainability Chair	Shane Waddell
Secretary	Beth Norman	IDEA+ Co-Chairs	Phoebe Jekielek Tori McDermott
Member at Large	Sonia Nobrega	International Committee Co-Chairs	David Maneli Rhonda Struminger
Member at Large	Teresa Schueller	Outreach and Communications Committee Chair	Conner Philson
Early Career Member at Large	Scott Thomas	Collaborations Committee Chair	Itchung Cheung
Editor	Stacy McNulty	AIBS Liaison	Paul Foster
Website Coordinator	Jason Tallant	Historian	Mary Hufty

2023 Annual Meeting Committee Report – Co-Chairs Skip Van Bloem and Tom Bansak

The 2023 OBFS Annual Meeting was hosted by the Organization for Tropical Studies at the La Selva Research Station in Costa Rica from September 11-16, 2023. Many thanks to the hosting staff, the planning committee, and all those who attended the meeting. The theme of the meeting was “Adapting to a Changing Climate; Supporting Resilient Stations for Today and for Tomorrow”.

OBFS award recipients honored at the 2023 Annual Meeting:

- Friend of OBFS Award: **Peter McCartney**
- Advancing Equity Award: **University of California, Merced; ¿Field Curious? Program**
- Mary Hufty Local Hero Award: **Orlando Vargas**

Membership Committee Report – Chair: Paul Wetzel

The Membership Committee has been instrumental in developing the new OBFS website, which was shared at the 2023 Annual Meeting. Sarah Oktay has led content creation and Nancy Lowe has been the artistic director. The website is intended to be interactive, with members populating events and discussion posts.

As of the 2023 Annual Meeting, OBFS included 175 member stations and 50 individual members.

Development Committee Report – Co-Chairs: Brian Kloepel and Sarah Oktay

The Development Committee is a collaborative committee that is looking for more members to help build our group of external field station friends.

In 2023, the committee worked to establish an Individual Lifetime Membership option, the Philippe Cohen and Cindy Stead Endowment account, and a Planned Giving Program.

The committee also continues to develop and conduct Friend/Fundraising, to offer Friend/Fundraising Concurrent Session at OBFS annual meetings, and to oversee special awards and recognitions (e.g. Friend of OBFS).

Governance and Sustainability Committee Report – Chair: Shane Waddell

The purpose of the Governance and Sustainability Committee's role is to provide the Board with recommendations regarding the Bylaws of the Organization, to provide transparency to OBFS business procedures, and to ensure that meetings and operations follow the bylaws and organizational policies.

During 2023, the Governance Committee worked to implement and evaluate the progress of the OBFS Strategic Plan. Efforts included updating the Policies and Procedures Manual, consolidating online board resources and offering Board orientation, developing Codes of Conduct in collaboration with the IDEA+ Committee, and beginning discussions of best practices for OBFS document storage and management.

Additionally, the committee administered the new Mini-Grant program. Three applications were received in 2023 with awards made to Nancy Lowe and to UFERN.

IDEA+ Committee Report – Co-Chairs: Phoebe Jekielek and Tori McDermott

For OBFS to fulfill our mission and serve our members effectively, the organization and its members must work to prevent bias, discrimination, and dismantle systemic racism and its legacy effects. The inclusion, diversity, equity, accessibility, plus (justice, belonging) (IDEA+)

committee seeks to forge new collaborations, establish new programs, provide tools, and dedicate resources to help remove barriers to diversity, equity, and inclusion (DEI).

The OBFS IDEA+ committee continued to work to implement and meet the goals set forth by the strategic plan. The committee recruited new members and completed several activities in 2023.

Advancing Equity Award - The call for the Advancing Equity award was edited (e.g., more specific language and a standard timeline created) and a rubric was developed to create a more consistent scoring system. In 2023, the committee awarded the Advancing Equity Award to University of California Merced ¿Field Curious? Program.

IDEA+ Spotlight - The IDEA+ committee began contributing the “IDEA+ Spotlight” in the quarterly newsletter. Committee members and the co-chairs contributed a variety of short articles to highlight, inform, and share content related to IDEA+ with the broader OBFS community.

Publications - OBFS IDEA+ members published articles including:

McDermott, V., Roketenetz, L. D., Jekielek, P., & Struminger, R. (2023). IDEA+ and OBFS: Using transdisciplinary strategies to create more inclusive spaces. *Integrative and Comparative Biology*, *icad025*. <https://doi.org/10.1093/icb/icad025>

McDermott, V., Kauten, R., Gee, J., & May, A. (2023). Understanding and mitigating interpersonal communication conflict in field based institutions. *Bulletin of the Ecological Society of America*, *104*(1), e02037. <https://doi.org/10.1002/bes2.2037>

Ongoing and Upcoming Tasks - The committee is pursuing several other initiatives, including reviewing OBFS materials (policies, outreach, marketing, and communications, etc.) for inclusive language and practices with input from a diverse group including individuals from underrepresented groups, starting a running resource list BMPs on DEIJ initiatives, developing an OBFS statement on DEIJ and code of ethics for all occasions, exploring strategies to create an endowment within OBFS to support DEIJ, and beginning to explore the feasibility of an OBFS-backed certification.

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

The purpose of the International Committee is to serve as the voice for OBFS-member international field stations (IFSs) by representing their circumstances, needs, & interests, to offer member IFSs opportunities 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, and to expand OBFS membership.

The International focused on three main initiatives in 2023 that aligned with the OBFS Strategic Plan.

Matching Program – The Matching Program brings three or more stations together to accomplish a specific goal. Examples include developing baseline data for future funding proposals, developing a collaborative project, publishing an article, creating content for social media (e.g., a podcast, Youtube series), or establishing a supportive/mentoring group to work through field station challenges. OBFS has budgeted money (up to \$5,000 per year for three years) to help the matched groups start their collaboration and/or projects. The first year focuses on planning, the second year on development, and the third year on implementation. The matching program facilitates the partnerships but each team works independently. Often the monthly International Committee meetings become opportunities for groups to share progress, get help from each other. The program deliverables may include a report to the Matching Program Committee and the OBFS Board, a published article or testimonial about the group's experience to be used on the OBFS Website, social media platforms, and/or newsletter, a presentation during a concurrent session at the annual OBFS meeting or a Virtual Café.

Virtual Regional Meetings – Three international regional meetings occurred in 2023: Canada, Latin America, and Europe/Africa. The Latin American regional meeting included 18 stations across 7 countries discussing topics such as community relations, fundraising, development, and research. The Europe/Africa regional meeting included 21 stations across 12 countries discussing community relations, fundraising, and research. Recordings of meetings are available on the OBFS Youtube channel.

Virtual Cafés – These one hour virtual gatherings feature station presentations or conversations on topics of interest. 2023 cafes featured Neighborhood Conversations (how do stations engage with their community?), the Organization for Tropical Studies (Kruger National Park/Stations in National Parks), and Conservation Opportunities at the Tiputini Biodiversity Station in Amazonian Ecuador. Past talks available on the OBFS YouTube Channel.

Outreach and Communications Committee Report – Chair: Conner Philson

Highlights from the Outreach and Communications Committee in 2023 include another successful AIBS Congressional Visit Day. Thank you to Jennifer Seavey, Rebecca Kauten, & Shane Waddell and the OBFSC Collaborations Committee and OBFS-AIBS Liaison for making this event a success. A forthcoming Bioscience Talks podcast episode will be all about field stations and OBFS with guests Lara Roketenetz, Rhonda Struminger, & Chris Lorentz.

The quarterly newsletter continues to be a success thanks to Stacy McNulty and all who contributed materials. Advocacy materials are to be available on the forthcoming website, including a toolkit for engaging with policy makers.

Collaborations Committee Report – Chair: Itchung Cheung

The Collaborations Committee focused on strengthening collaborations with key partners. With the support of OBFS and member stations, the Virtual Field continues to grow as evidenced by The Virtual Field NSF RCN-UBE and The Virtual Field K-12 NAML Education Webinar. OBFS

hosted a table at the SACNAS National Diversity in STEM Conference. We also continue to work with the American Institute of Biological Sciences (AIBS).

Final Budget Report FY 2023 – Submitted by Paul R. Wetzel, Treasurer

The FY 2023 final budget report indicates an organization in a strong fiscal position. This report describes the major fiscal trends in the OBFS financial actions that occurred in 2023.

OBFS income totaled \$94,547 with some income sources reaching record levels. Membership dues (\$50,300) and auction donations (\$13,595; see auction contribution history↓) were the highest ever recorded. This year the OBFS Board established a Lifetime membership category. All of those funds and any designated donations will be added to a newly formed endowment. In FY 2023, \$14,250 were contributed to the endowment.

Operating expenses (expenses not related to the Strategic Plan initiatives) totaled \$47,659 and included AIBS membership dues for 2023 and 2024 and programs (\$6,175), travel awards to the annual meeting and Congressional Visits Day (\$17,604), annual meeting expenses (\$11,717) and general administration and website maintenance (\$12,163). Total operating income was \$50,506 which comfortably covered the \$47,659 in operating expenses.

Money spent toward Strategic Plan initiatives totaled \$49,525 in 2023. Of that amount, \$27,533 was spent on developing the new website. The IDEA+ Committee funded several people to attend the Society for Advancement of Chicanos/Hispanics & Native Americans in Science (SACNAS) conference in Portland, Oregon. The main goal was to attend a table and promote the OBFS organization. Other major expenses included the International Committee authorizing \$5,239 for their matching program and virtual workshops, payment of the last invoice for the membership survey (\$4,941) and the payment of \$3,600 for the mini-grants program. None of the Strategic Plan committees spent all of the money that was budgeted for those programs.

OBFS' mutual funds all had positive earnings in the fourth quarter with the Social Investment Fund value increasing \$31,000 over the last three months. Total net assets for the end of 2024 equaled \$733,330 (see graph below for value history). Fiscal projects for 2024 include establishing the endowment and balancing the funds to match the investment strategy, learn how to use the new website, and to develop and contribute to an organization list of assets.

Respectfully submitted,

Paul R. Wetzel, Treasurer

Proposed 2023 Budget Fiscal Year = Calendar Year starting 1 January 2023

General Budget Categories	2017-18 Budget Actuals	2018-19 Budget Actuals	2019 Sept.- Dec. Budget Actuals	2020 Budget Actuals	2021 Budget Actuals	2022 Budget Actuals	2023 Budget Projections	Notes
I. Income								
Membership dues	33,450	42,495	21,550	37,750	37,200	36,450	34,000	
Investment dividends, capital gains, and interest	4,990	5,999	3,575	4,864	3,393	5,947	3,000	
Auction (revenue goes to restricted fund)	10,566	11,449	1,352	8,890	8,145	13,184	8,000	
Development event revenue	0	(1,045)	0	0	0	0	0	
Donations	4,200	0	1,200	2,714	2,260	4,250	2,000	
Total Income	53,205	58,898	27,677	54,218	50,998	59,831	47,000	
Total Operating Income	37,718	41,496	22,750	40,464	39,460	40,700	36,000	
II. Expenses								
<i>Other Organization Membership Dues</i>	5,400	0	0	2,700	2,700	2,700	3,000	
<i>Bank and transaction expenses</i>	2,176	2,155	446	2,323	2,296	1,723	2,300	
<i>Travel (CVD, Awards, AIBS collaborations, contingencies, etc.)</i>	10,412	13,841	0	1,602	1,630	4,325	5,000	
<i>Administration (ZOOM, Postage, etc.)</i>	317	403	116	546	552	2,928	3,000	
<i>Communications & Outreach (ESA Booth, newsletter, Survey Monkey, Virtual Field, etc.)</i>	0	5,650		3,466	3,166	1,467	3,500	
<i>Website and data management</i>	5,625	5,540	1,806	9,231	4,862	8,419	6,000	
<i>Strategic Plan--Year 1</i>								
<i>Collaborations Committee -- professional development // includes comprehensive member survey</i>						6,500	17,950	\$5000 carried from 2022 (\$3000 survey analysis; \$1500 for Station exchange prog.)
<i>Development Committee</i>						2,706	500	
<i>Governance Committee -- New board member orientation</i>						0	20,000	Mini grants program
<i>IDEA+ Committee -- Speaker fees for annual meeting and a workshop</i>						0	12,000	
<i>International Committee -- Station matching program travel expenses</i>						3,559	36,941	\$16,441 carried over from 2022 (Matching prog.)
<i>Member Support/Services Committee -- Website overhaul</i>						18,333	42,667	\$36,667 carried over from 2022
<i>Outreach & Communications Strategic Plan Initiatives</i>						0	1,950	
<i>Annual Meeting (travel, awards, expenses, & contingency)</i>	3,846	259	3,989	9,773	8,256	9,823	14,500	
<i>Contingency</i>	-		0	0	0	0	2,500	
<i>Committee & Organizational Projects</i>	0	5,326	0	0	0	0	0	
Operating Expense Total	27,776	33,175	6,357	29,640	23,462	62,483	171,808	
Expense Variance (Operating Income-Expenses)	9,942	8,321	16,393	10,824	15,998	(21,783)	(135,808)	
III. Assets								
<i>Vanguard Social Investment Fund</i>	364,518	391,266	435,897	277,202	365,794	340,068		
<i>Vanguard Federal Money Mkt Fund</i>	3,253	3,321	3,346	235,283	235,307	235,307		
<i>Checking & Savings (UMASS Five College FCU)</i>	80,019	87,181	91,698	118,615	136,665	145,192		
Total Net Assets	\$ 447,790	\$ 481,767	\$ 530,941	\$ 631,100	\$ 737,766	\$ 720,567		

Looking Ahead – 2025

Newly elected Board members (terms start January 2024) and newly appointed Committee Chairs

President	Rhonda Struminger	Member at Large	Megan Napoli
Secretary	Beth Norman	Member at Large, Early Career	Sofia Rodriguez

The 2024 OBFS Annual Meeting will be jointly hosted by the Clemson Baruch Institute of Coastal Ecology & Forest Science & University of South Carolina Baruch Institute for Marine & Coastal Sciences, Pawley's Island, South Carolina USA.

