

Visions III

A Strategic Plan for the Coastal and Estuarine Research Federation (CERF)

(2012 – 2016)

CERF Mission Statement

The Federation advances understanding and stewardship of estuarine and coastal ecosystems worldwide. Its overall mission is to:

- ***Promote research in estuarine and coastal ecosystems***
- ***Support education of scientists, decision-makers and the public***
- ***Facilitate communication among these groups***

Membership in the Federation is open to all who support these goals. The Federation currently has approximately 1200 members; Affiliate Societies have about 1600 members that help to comprise the Federation.

The Federation addresses the purposes listed above via, but not limited to, the following activities: 1) convening international, biennial conferences; 2) supporting frequent meetings of regional Affiliate Societies; 3) publication of the scholarly journal *Estuaries and Coasts*; 4) publication of a quarterly Federation Newsletter; 5) publishing Coastal and Estuarine Science News (CESN); 6) maintaining a CERF website; and 7) serving as a source of advice on estuarine and coastal management and policy issues.

About the Federation

CERF is a multi-disciplinary organization of individuals who study, educate, manage, and promote awareness of the issues surrounding coastal and estuarine ecosystems, including effects of human activities on these environments. The Federation's members are dedicated to advancing understanding and appreciation of the Earth's estuaries and coasts, to the wise use and management of these environments, and to making the results of their research and management actions available to their colleagues and to the public. Members of the Federation include academic researchers, public sector managers, teachers, consultants, students and others who are interested in estuaries, wetlands and the coastal ocean.

The Coastal and Estuarine Research Federation is a private, non-profit organization. The Federation was created in 1971, when members of two regionally-based estuarine research societies decided that an international organization was needed to address estuarine and coastal issues more broadly. The regionally based Affiliate Societies now number seven and encompass coastal regions that border the United States, Canada and Mexico.

Previous Strategic Plans of the Federation

The Federation has had two previous Strategic Plans, the first spanning the period 1993 – 2004 and the second spanning the period 2005-2011. The goals of these plans have largely been accomplished. At the start of the Williams Administration (2009) the CERF Board agreed to develop a revised strategic plan (Visions III) for the period 2012 - 2016.

Goals, Visions, Objectives, Actions and Metrics

GOAL 1. Coastal and Estuarine Research

Vision: Increase support and promote disciplinary and multi-disciplinary scientific research that focuses on the characterization and dynamic processes within estuaries and coastal ecosystems. Synthesis of data is to be especially promoted both as a way of developing new scientific understanding and to be of more direct utility for management of coastal and estuarine ecosystems.

Objectives: There are five major objectives:

- Ensure the publication of high-quality research of estuarine and coastal science.
- Publish periodic review papers, syntheses, and technical summaries to describe the status of knowledge regarding specific topic areas in estuarine and marine sciences (interface with CERF Publications Goals)
- Identify significant gaps in the technical knowledge and understanding of estuarine and coastal sciences, and articulate priority areas for new research (interface with CERF Policy Goals)
- Encourage academic institutions, federal/state/regional agencies, non-governmental organizations, and other groups to make contributions of institutional, collaborative, and financial support to address the priority research issues identified by CERF (interface with CERF Policy goals)
- Provide CERF administrative and logistic support to the regional affiliate societies that serve as catalysts for regional estuarine science and communication activities

Current and Future Actions:

- Maintain and enhance quality and accessibility of *Estuaries and Coasts*.

- CERF Reviews Editor will take action to solicit topics and authors for review papers, work with authors to establish timelines for production and review of the CERF review articles.
- Solicit input on priority research needs from CERF review authors, CERF membership, and from the CERF affiliate societies, and circulate lists for comments, review and action.
- Forward lists and descriptions of priority research needs to the CERF Policy Committee so this committee can make these needs widely known.
- Schedule special sessions at the CERF conference and Affiliate Society conferences to present and discuss the priority research needs in estuarine and coastal sciences.
- The CERF Governing Board and CERF Policy Committee should consider opportunities to develop written materials, briefing packages, and presentations for academic institutions, federal/state/regional agencies, and non-governmental organizations in an effort to influence decision-making regarding support to address priority research issues (interface with CERF Policy goals).
- Maintain and update announcements of research opportunities (RFPs, FFOs, solicitations of grant proposals) on the CERF website.
- Promote announcements of job opportunities on the CERF website (interface with CERF Education goals).
- Conduct special-topic workshops during CERF conferences that will serve as focal points for technical communication and facilitation of collaborative research projects.
- Consider requests for CERF support for inter-sessional focus group meetings, workshops, and training sessions that serve to facilitate collaboration between natural scientists, social scientists, and coastal resource managers.
- Explore development of a common website interface and electronic database that will provide seamless access and integrative management services for the CERF membership and the mailing lists maintained by the affiliate societies (interface with Communications and Membership goals).
- Consider providing CERF support for requests made by Affiliate Societies for speakers, special workshops, initiative development meetings, and other events that will help stimulate new research and enhanced communications (interface with Communications and Membership goals).

Metrics of Progress:

- Designate a milestone to publish a review paper in each issue of *Estuaries and Coasts* beginning in 2012.
- Track the number of CERF Conference sessions and Affiliate meeting talks aimed at promoting coastal and estuarine research initiatives.

- Track the number of research-focused workshops and training sessions supported by CERF.
- Follow efforts to be more inclusive in coastal and estuarine research, especially regarding involvement of social, economic and political scientists.

GOAL 2. CERF Publications

Vision: The primary vehicles the Federation communicates through are the various CERF publications. These currently include a scholarly journal (Estuaries and Coasts; E&C); a quarterly newsletter; and Coastal and Estuarine Science News (CESN), a publication based on selected E&C papers edited for a broader public readership. These are viewed as essential activities of the Federation and should be supported, strengthened and possibly diversified in the future.

Objectives:

- Strengthen and refine the business model for E&C into the future. There was a very successful transition of E&C from a regional to a global publisher and similar success with the business model of the new publisher, Springer.
- Continue to support and enhance the quality of E&C and the editorial process for all CERF publication products.
- Examine the potential of new methods for publications/communications to better serve the membership and the evolving goals of education and policy.
- Determine if the membership and the mission of CERF would be served by establishing a new journal (e.g., Estuarine Management, Policy, Methods).
- Formally adopt the task to provide new editions of the text book *Estuarine Ecology* and carefully consider using Federation resources for the development of additional text books on topics reflecting CERF membership interests and mission.

Current and Future Actions:

- Continue to invest time, thought and resources in the Publisher relationship (currently Springer) with CERF to promote increased distribution and visibility of the journal. For example, consider recommending cross-advertising E&C on other Springer platforms,

- promoting cross-cutting articles and alerting Springer of review or other articles of special significance.
- Encourage major players in our field to submit manuscripts to E&C and to ask them to encourage their colleagues to do the same. Remind all that citation rates in E&C are very comparable to other journals publishing items concerned with coastal and estuarine science.
 - In a few years, re-do the E&C Bibliographic study and use this as a further guide for journal development and promotion.
 - The Associate Editors and reviewers provide a very valuable service to the journal and the Federation. The Publications Committee needs to consider additional ways of thanking these individuals. Continue to maintain the international diversity of the pool of Associate Editors.
 - Make use of Publisher services in editing and foreign language editing.
 - The Publications Committee needs to consider emerging modes for communication of science, including:
 - Blogs and other rapid forms of communication
 - Social networking outlets to link to the Federation journal and other sources of information
 - Explore the possibility of developing/using Café Scientific for short, focused talks
 - Explore the Web of Science website for appropriate links
 - Determine if E&C can be accessed via electronic readers (e.g., Kindle, iPad, Nook).
 - Encourage more submissions to E&C from disciplines of physical, chemical and geological sciences

Metrics of Progress:

- Review, on an annual basis, the fiscal status of the journal
- Review, on a less frequent basis, the various performance metrics (e.g., impact factor of the journal)
- Conclude the update and re-issue of the 2nd edition of *Estuarine Ecology*
- After 4 years from publication, re-issue a 3rd edition of *Estuarine Ecology* (or a different version of a text book) designed to meet the needs of teachers and students at that time with publication scheduled for 6 years after the 2nd edition is released.

Goal 3. International Activities

Vision: CERF is an international federation with members from 29 countries outside the U.S. comprising about 11% of membership. The CERF international vision is to further promote communication among estuarine and coastal scientists and environmental managers worldwide and to further promote research, education, and management in these systems worldwide.

Objectives:

- Increased international participation in the Federation in terms of membership, attendance at CERF conferences, and publications in the CERF journal.
- A greater presence in other countries via development of off-year conferences, workshops and other exchange programs.
- Increased associations with regional organizations outside the U.S. or are international in other ways.

Current and Future Actions:

- Primary regions of interest focus on Latin America (LA) with emphasis on Mexico, Argentina, Chile, Costa Rica, and Brazil. Additional areas include the Pacific Rim and Europe. Initiatives will be based on opportunities and available leadership.
- The highest priority item is the conference in Argentina scheduled for late-2012.
- Assess current status of international participation in conferences, membership, and authorship in journal publications.
- Provide second language content (likely Spanish) on the CERF web site.
- Develop actions attracting foreign students including informing students about travel support and producing workshops on scientific publications for non-English native speakers.
- Adopt a "Developing Country Rate" for some CERF international membership.
- Develop a program to establish connections and assist regional groups to form societies, networks, workshops and meetings.
- Create posters and informational brochures translated into Spanish and sent to members in Latin America, especially posters for the 2012 Argentina meeting and the CERF 2013 San Diego Conference.
- Establish memoranda of agreement with other organizations to promote estuarine and coastal science and environmental management.

Metrics of Progress:

- Assess the financial, educational and professional success of the 2012 Argentina conference.
- Assess the status of members, authors, conference participants and website hits from outside USA and re-do this assessment every two years examining data for progress towards increasing involvement in CERF by international scientists and students. A metric of success would be a 5-10% increase in the above activities in the first 2 years.

GOAL 4. Policy Issues

Vision: CERF's mission is highly relevant to non-scientists involved in developing and implementing policy and making wise environmental decisions. CERF, in its approved Policy Guidelines, defined "'decision-makers' to include elected officials who enact policy and managers who implement such policy at regional, state, national, or international levels". CERF's expertise is also of value to other entities, such as non-governmental organizations that influence policy.

Objectives:

- To enhance communication and technical information flow of valid and credible scientific information concerning coastal and estuarine science to CERF's target audience to assist in making science-based policy and management decisions. The target audience includes non-scientists involved in making/developing policy and scientists and non-scientists who implement policy and make environmental decisions based on existing laws. In this sense, the Policy/Outreach component of the Strategic Plan focuses on a specific subgroup within the broader education and outreach mission of CERF. CERF has already initiated action toward meeting many policy and education-related objectives as articulated in Visions II. Examples include CESN (Coastal and Estuarine Science News), CERF-Lit, significant changes to the CERF Journal, and up-grade of the website and newsletter.

Current and Future Actions:

- The current policy-relevant education and outreach actions of CERF should be maintained and strengthened.

- The following new actions would further improve CERF's management and policy goals.
 - Translate CESN into Spanish and other key languages.
 - Develop workshops on government relations (interaction with government officials) for students and other members.
 - Develop CERF Literature Series (CERF-Lit) on specific topics of interest for policy and management, using the list of prioritized issues from the 2009 Town Hall Meeting at the Portland biennial conference.
 - Develop white papers from a prioritized list of issues.
 - Increase CERF's presence in regional, state, and federal legislative and executive offices.
 - Increase CERF's presence at key organized annual meetings devoted to ocean science management and policy (e.g., Coastal States Week, Capitol Hill Ocean Week).
 - Develop a CERF policy presence such that CERF becomes a source for 'trusted science advisors'.
 - Facilitate interaction and collaboration with the education component of this strategic plan. Education and Policy elements overlap extensively and a formal collaboration would enhance each of these elements. Because CERF committees are constituted with each new administration, we recommend that Education and Policy committees continue to be appointed and provided with a formal mechanism for collaboration (e.g., time for joint committee meetings at Board Meetings).
 - Develop materials in support of these actions. There are many examples, including traveling displays and posters for meetings, one page briefing statements (based on the white papers), fact sheets, regular newsletter articles, web resources (Interface with Communications and Membership).
 - Foster cooperation with the Policy Office of the American Institute of Biological Sciences and other programs (e.g., Coalition of Aquatic Science Societies) to promote initiatives relevant to CERF.
- Enhance a more integrated and interdisciplinary approach to coastal and estuarine research and management that recognizes humans as part of the ecosystem.
 - Invite and encourage more *social scientists* to become members (i.e., political scientists, economists, sociologists, historians, anthropologists)
 - Solicit special integrated sessions at our biannual meeting and Affiliate Societies meetings to achieve this objective.
 - Expand CERF-Lit and resources to include management and policy related topics (e.g., Clean Water Act).

- Distribute to all CERF Board members the recent ESA publication: An Ecologist's Guide to Policy Engagement

Metrics of Progress: Impacts of CERF's policy plan is likely to be difficult to track in the short-term. With this caveat in mind, the following short-term metrics can be tracked:

- Track the number of policy articles, white papers, and fact sheets produced by CERF.
- Use of web-based material quantified in higher detail, such as through Google Analytics.
- At biennial CERF meetings increased attendance by more social scientists and more integrative, multidisciplinary sessions.
- Increased participation by CERF representatives at annual meetings targeting science, management, and policy.
- Increased outreach to legislative and executive offices.
- Increase in numbers of social sciences members.

GOAL 5. Education

Vision: One of the prime missions of the Federation concerns providing educational materials, resources and experiences for both members and the general public. The educational goals seek to reach all CERF members, but there is a special emphasis on university student participation in the CERF community.

Objectives:

- Develop educational resources for students and professionals.
- Continue to support student participation and attendance at conferences.
- Enhance student member recruitment and retention.

Current and Future Actions:

- Roll out a comprehensive CERF-Lit edition on fundamental CERF-relevant topics
- Continue to develop CERF-Lit as a living resource on into the future.
- Identify a champion to develop and maintain web content including an image gallery of coastal and estuarine science.
- Develop and implement workshop(s)/webinar(s) on topics identified as of interest by our membership (e.g., career development) and target these during off-conference years.
- Actively seek new funding sources to support student activities and travel.

- Enhance communication between Education Committee and Conference Planning Committee (specifically, the workshop and student activities chairs).
- Coordinate with Communications Committee to develop and implement a student recruitment campaign (e.g., develop/distribute member recruiting poster, distribute “dear colleague” letters to list of professors and researchers, and consider offering a “gift membership”).

Metrics of Progress:

- Track CERF website statistics for all education-related content indicating increased usage.
- Track workshop attendance, participant response and membership expressions of interest in continuing these activities.
- Track percentage of students that attend CERF conferences, especially those supported by CERF funding mechanisms, with increases during the next 5 year period.
- Enhance existing programs and develop new ones at conferences (e.g., mentoring program, e-workshops) and track participation rates.
- Track student participation in these events and event evaluations to revise and build future events.
- Track and evaluate student membership and conference attendance rates.

GOAL 6. Communications and Membership

Vision: Diversity of research, education, membership and outreach are central characteristics of CERF. To serve and enhance effectiveness in dealing with this diversity is a central mission of CERF. Website and other communication modes are very important tools to accomplish these goals.

Objectives:

- Develop and launch initiatives to raise CERF’s profile, by promoting coastal and estuarine research, increasing public awareness about issues surrounding these ecosystems (policy, management, education, and public outreach), and facilitating communication among stakeholders
- To improve membership recruitment and retention by effectively communicating that CERF is a very dynamic and active organization and that individual membership is important to us and all that we do

Current and Future Actions:

- **Website:** The CERF website is an excellent source of information and serves as a “first point of contact” for attracting new members. The

- recent CERF web redesign improved its functionality and attractiveness; the website should continue to be maintained for performance by
- Forming a focus group to continue to examine the use of the CERF website
 - Investigate a “members only” part to the website for registration for webinars, mentorship activities, testimonials, image library, etc.
 - Explore creation of an integrated web-based Affiliate Society database for conference registration and society membership.
- **Social Media:** This medium is viewed as critical to modernize CERF, and to recruit and maintain younger members. CERF needs to develop a presence on social media and blog forums.
 - **Conferences**
 - Encourage poster presenters to submit an electronic slide to advertise key points from their poster.
 - Better promote CERF at CERF and other meetings using the CERF travelling display/booth.
 - Provide a booth at CERF conferences for attendees to submit ideas for webinars (e.g. multivariate statistics, GIS training, sampling methodologies, image analysis).
 - **Membership Recruitment and Retention:** membership retention and recruitment of scientists in CERF and other scientific societies has become a major issue. CERF intends to take strong actions in this area including:
 - Continue the new member-author campaign in conjunction with Springer, current publisher of E&C.
 - Initiate a lapsed member campaign via direct e-mail and telephone contacts by CERF Board members.
 - Intensify new member recognition in CERF publications
 - Modify membership costs for students, new professionals, NGOs and developing countries
 - Intensify efforts to invite individuals from other communities to join CERF including naturalists groups, NGOs, management societies, environmental educators, and the public sector.
 - Encourage more student attendance at conferences via financial support in and more active engagement in CERF conference planning and operations.
 - Continue development of the “Reasons to join CERF” documents with thought given to needs of different demographic groups.
 - **Untapped Potential Activities and Gaps in Activities:** The following additional communication and membership actions that should be considered by CERF include:

- Use of the tagline “*Become a voice for estuaries and coasts*” wherever possible to let members know they can affect policy through science by joining CERF.
- Create a CERF Speaker Series involving a group of CERF members who could be sent to different venues to give focus talks.
- Create a new CERF award for communications/scientific journalism.
- Develop effective public outreach initiatives to better promote awareness of our coastal and estuarine ecosystems to the general public.
- The idea of translating selected CERF documents into Spanish and Chinese (and possibly other languages) has been discussed and should be pursued, initially on a trial basis.

Metrics of Progress:

- Obtaining a better understanding of who is using CERF web resources and how they use them is paramount. Google statistics are good for demonstrating such things as number of site visits, and whether people visit more than just the home page. However, we believe that to demonstrate success from changes to the website, we should see an increase in membership for the society.
- Track the increase in CERF users who join the CERF Facebook group; an increase in CERF membership could also be a measurable result.
- Evaluation form from the next conference would survey participants and ask questions that address these initiatives.

GOAL 7 Development and Strengthening of the Affiliate Societies

Vision: CERF began with the recognition by several regional societies that a broader, national and international organization was needed. Since then, there has been a mutually beneficial relationship between CERF and the Affiliate Societies, with growth by both. CERF resources in communications and organization services need to continue and expand to serve the Affiliate Societies and the Affiliates need to continue acting as catalysts for regional estuarine science and communication activities while serving to strengthen affiliate memberships ties with CERF.

Objectives:

- Providing CERF administrative and logistic support to the regional Affiliate Societies.
- Engaging Affiliate Societies to serve as catalysts for regional collaboration in coastal and estuarine science.

Current and Future Actions:

- Continue to explore potential CERF administrative and logistical support to the regional Affiliate Societies, such as potential collaborations to unify website, membership, and meeting registration services.
- Provide access to meeting insurance through CERF's meeting insurance policy.
- Provide access to funding in support of speaker travel for special sessions and workshops at Affiliate Society meetings.
- Continue to have Affiliate Society Presidents serve as active members on CERF Board of Directors.
- Continue to accept membership dues for Affiliate Societies.
- Expand membership through collaborations with CERF and Affiliate Societies.

Metrics of Progress:

- Track the percentage of Affiliate members who are CERF members.
- Track the percentage of CERF members who are Affiliate members.
- Institute continuing insurance availability for Affiliate's meetings.
- A CERF officer or Executive Director attends each Affiliate meeting.
- Track number of speakers/travel awards from CERF to Affiliates each year.
- Track the number of Affiliate members attending biennial conference.