



COASTAL AND ESTUARINE RESEARCH FEDERATION®

Publishers of the journal *Estuaries and Coasts*

Long-term Collaborative Arrangements Between CERF and Other Organizations

The Coastal and Estuarine Research Federation (CERF) has established three types of long-term collaborative relationships with organizations sharing CERF's mission and values. Designed to suit the interests and needs of a variety of organizations, the different types of relationship are defined by varying degrees of interaction and commitment. Each relationship is intended to be mutually advantageous for promoting the missions of CERF and the other organization. CERF also cooperates routinely with outside organizations for short time periods, such as through one-time events or activities in conjunction with biennial CERF conferences; organizations are encouraged to inquire with the CERF business office about such short-term collaborative opportunities.

The criteria defining the three types of relationships are listed in detail below and summarized in the attached comparison table. The Affiliate relationship provides the strongest association to CERF, with the greatest organizational benefits and ensuing expectations. At present, the Federation includes seven Affiliate Societies that together encompass all of the coastal regions that border the United States, Canada and Mexico. The Chapter and Partner relationships define alternative approaches for achieving mutual benefits. Although the expectation is that most new collaborative relationships will be established with organizations that exist outside of North America, these arrangements are equally applicable to areas of North America that are not represented uniquely in the Federation (e.g. Alaska, Hawaii, Caribbean islands, Great Lakes).

Affiliate Society - a regional organization of CERF defined by the existing CERF-Affiliate Society relationship. This includes voting representation on the Governing Board (GB), participation in GB meetings, and all other mutual benefits, privileges, and expectations associated with the CERF-Affiliate relationship. These currently include sharing of travel costs associated with attending GB meetings (CERF and the Affiliate Society each cover half the total cost), and the availability of CERF funds to support travel by outside experts to Affiliate Society conferences. Formation of a new Affiliate Society provides a permanent structure to promote CERF's mission in new regions and allows CERF and the regional organization to plan on long time scales. The following criteria emphasize the magnitude of this arrangement to both CERF and the new Affiliate Society:

- A regional organization exists with a mission and purpose that support the values and objectives of CERF
- The regional organization is well established, with leadership, a defined governance structure, and guiding governance documents
- At the time of joining CERF, the regional organization has at least 50 members

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AFFILIATE SOCIETIES

Atlantic Estuarine Research Society
California Estuarine Research Society

Gulf Estuarine Research Society
Atlantic Canada Coastal & Estuarine Science Society
New England Estuarine Research Society

Pacific Estuarine Research Society
Southeastern Estuarine Research Society

- The regional organization expressed initial interest in formalizing a relationship with CERF
- The regional organization convenes scientific conferences or meetings that occur at least biennially
- The regional organization has sufficient financial assets to support participation in CERF at the Affiliate Society level
- The regional organization commits to promoting CERF values within its membership and geographic area
- The president or equivalent leadership representative of the regional organization will be a voting member of the CERF GB, with all privileges and expectations of that position
 - The president or equivalent leadership representative of the regional organization will participate actively in CERF GB meetings
 - As currently defined, travel costs for in-person participation in CERF GB meetings are shared evenly between the regional organization and CERF
- The president (or equivalent leadership representative, as defined by CERF) of the regional organization must be or become a full voting member of CERF
- The terms of the relationship between CERF and the regional organization will be defined by the existing CERF-Affiliate Society operating procedures and Affiliate Society privileges outlined therein
- The relationship between CERF and the regional organization is perceived at the outset to be permanent

Chapter – a regional organization of CERF that is not bound by the expectations of CERF Affiliate Societies nor afforded the full benefits of the Affiliate relationship. Chapters offer a means of collaboration in geographic areas where a regional organization does not already exist as part of the Federation. Formation of a new Chapter provides a long-term structure and formal framework within CERF to promote the Federation’s mission in new regions, while offering a mechanism to join CERF for groups that may not have the capacity, interest, or support for becoming a CERF Affiliate. Criteria for Chapters include:

- A regional group (with no formal governance structure) or organization (with a formal governance structure) exists of at least 25 people with interests and expertise aligned with CERF’s mission.
- In the case of regional groups, a formal regional organization will be created with a mission and purpose that is consistent with the values and objectives of CERF.
- The regional group or organization has or will develop leadership, a defined governance structure, and guiding governance documents.
- Either CERF or the regional organization expressed an initial interest in formalizing a mutually-beneficial Chapter arrangement.
- The regional organization either convenes or is working towards convening regular scientific conferences or meetings.
- The president or equivalent leadership representative of the regional organization will be invited to observe CERF GB meetings at the expense of the regional organization, but may not participate as a voting member.
- The terms of the relationship between CERF and the regional organization will be defined by the CERF-Chapter operating procedures and Chapter privileges outlined therein. These are still to be defined, but would be expected to include commitments to

communication and sharing of resources to promote understanding and wise stewardship of coastal and estuarine resources.

- The relationship between CERF and the regional organization is defined for a period of six years
- At the end of a chapter agreement, the Chapter may be dissolved or renewed by agreement of both parties
- At the end of a chapter agreement, the Chapter may petition to become an Affiliate Society, with all the expectations and privileges of the CERF-Affiliate relationship

Partner – an organization with whom a formal collaborative agreement to support and promote each other’s mission would confer mutual benefits. A partner organization is usually larger than an Affiliate Society or Chapter and has broader geographic scope, but these are not defining characteristics; i.e. a Partner may be a regional organization. Partners may be scientific societies, governmental or nongovernmental organizations, or private companies. Formation of partner agreements provides a rapid means to promote CERF’s mission in new areas. Criteria for Partners include:

- The mission and purpose of the partner organization are similar, overlapping, or complementary to those of CERF
- The organization is well established
- Either CERF or the partner organization expressed an initial interest in formalizing a mutually-beneficial arrangement through an MOU or other type of formal agreement
- The leadership of the organization has authority to enter into a formal relationship with CERF
- Terms of the agreement are determined by the leaderships of CERF and the partner organization
- The terms of the agreement are tailored to meet unique needs of each CERF-Partner relationship, and might include such provisions as reciprocal member benefits, development of collaborative programs, and sharing of information and dissemination platforms
- The agreement is for a fixed time period
- Upon expiration of the agreement, it can be terminated, amended, or renewed

Feature comparison of long-term collaborative relationships between CERF and international or regional organizations

FEATURE	AFFILIATE	CHAPTER	PARTNER
Size and scope of organization	Well established regional organization aligned with CERF mission & values, with defined governance structure and at least 50 members	Regional organization (with formal governance structure) or group (working toward formal governance structure) aligned with CERF mission & values, consists of at least 25 people	Well established organization with mission and purpose similar, overlapping, or complementary to CERF's; may have broad or regional geographic scope
Initial interest in formal relationship	Expressed to CERF by regional organization	Expressed by regional group/organization or by CERF	Expressed by organization or by CERF
Scientific conferences hosted by organization	Convenes conferences at least biennially	Convenes or working toward convening conferences at regular intervals	No general expectation
Financial assets of organization	Sufficient to participate in CERF at AS level	(Not defined)	(Not defined)
Terms of collaborative agreement	Commitment to promote CERF values within membership and region; terms defined by CERF-Affiliate operating procedures [to be developed]	Defined by CERF-Chapter operating procedures [to be developed]	Tailored to meet unique needs of each relationship; e.g. reciprocal member benefits, collaborative programming, commitments to communication and information sharing
Representation of organization on CERF Governing Board (GB)	Leadership rep is voting GB member, with privileges and expectations as defined (active GB participant with 50% travel paid by CERF)	Leadership rep invited to be nonvoting observer at expense of regional organization	None, though terms could include invitation to observe at own expense
Duration of formal relationship with CERF	Permanent	Six years, after which may be terminated or renewed, or Chapter may petition to become Affiliate	Agreed upon fixed period, after which may be terminated, amended, renewed

Approved by the CERF Governing Board, 21 April 2017