

VISION 2030
Strategic Plan of the Waterbird Society
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Vision 2030, the Strategic Plan (SP) of the Waterbird Society, provides a road map for the Society for the next ten years. We first articulate some overarching philosophies for each committee and then identify key recommendations under each primary goal of the WBS as identified by our Mission Statement (revised 2022). Governance, Finance and Investment, and Nominations were addressed separately as they relate directly to the functioning of the WBS. We include a corresponding Supplementary Document (S1) that provides a list of action plans with timelines as well as a document containing the results of our Member Survey administered in June 2023. While not all committees have specific action plans, a key recommendation - one that influenced the layout of this document - is for collaboration across committees.

SP Process: A Strategic Planning Committee (SPC) was formed. The SPC used the WBS 2020 Vision document (Strategic Plan 2011) as our starting point. We: 1) solicited and reviewed input from Committee chairs on the WBS 2020 Vision document; 2) synthesized the input and updated the SP document; 3) solicited input from Council (November 2022 Council meeting); 4) applied a “SMART” analysis ([S1](#)) to formalize objectives (March 2023); 5) consulted with Council again with a revised SP document (April 2023); 6) solicited input from membership through an online survey ([MS](#); May 2023); 7) reviewed and synthesized feedback into SP document (July 2023); 8) asked Council to adopt the SP (October 2023 Council Meeting); and 9) distributed and presented to membership (October 2023).

WBS Mission Statement: The Waterbird Society is an international, not-for-profit organization whose mission is to foster the study, evidence-based management, and conservation of the world’s aquatic birds. The Society’s primary goals are to: (1) promote research on waterbirds and their habitats, (2) foster waterbird conservation globally, (3) enhance opportunities for information-sharing and professional development, and (4) cultivate a diverse and welcoming community through equitable and inclusive values and practices. To accomplish these goals, the Society publishes a peer-reviewed journal, hosts scientific meetings, provides grants and awards, and facilitates related activities.

Overarching Committee Philosophies:

Governance - As prescribed in Society Bylaws, governance by a Council as elected by the membership provides the opportunity for all members to influence the mechanisms by which the Society meets its objectives.

Archives Committee - The Archives Committee is a standing committee whose purpose is to document the history of the Waterbird Society (1976-present). As a minimum, Archives should preserve annual reports that are submitted as a requirement of the Bylaws (e.g., Council meeting minutes, Treasurer's report), Council vote and membership ballot issues and outcomes, and the program of the Society's annual meeting. These documents should be copied and re-archived as technology advances.

Awards and Recognition Committee - Solicit nominations for the Distinguished Service Award, Kai Curry-Lindahl Award, and Robert Cushman Murphy Prize, review nominations and make recommendations to Council.

Bylaws Committee - Bylaws are the governing document of an organization and outline the fundamental principles and rules regarding the operation of the Society. The Bylaws Committee ensures that the actions and activities of the organization are conducted in a manner that is consistent with its Bylaws and serves as the authority for interpretation of the Bylaws.

Finance and Investment Committee - The Waterbirds Finance and Investment committee's charge is to manage the Waterbird society's three endowment funds for moderate growth while disbursement(s) are achieved both short- and long-term to support growth of the society and its mission, and consistent with funders' (Kushlan and Nisbet) objectives. The Waterbird Society, since it was established, has invested annual meeting profits and operating budget surpluses into the stock and bond markets. This strategy has resulted in a healthy endowment portfolio. Additionally, two long-time members, Ian Nisbet and Jim Kushlan have, and are donating, to two dedicated Endowment funds that are used to fund annual research grants on terns/gulls, and Herons, respectively. The Finance and Investment Committee works with a professional investment company to manage these three endowment funds to balance risk with long term growth and stability. While the Nisbet and Kushlan endowments have specific objectives and requirements, the Society's endowment is more flexible on disbursement, and is being used to fund a research grant program as well as other specific needs as identified by Council. The general disbursement policy has been to withdraw no more than 5% of the average amount in each of the funds annually to ensure that each can be maintained and administered in perpetuity.

Grants Committee - We review research proposals for studies related to the biology, ecology and conservation of waterbird species and chooses projects to fund based on the specific criteria and goals outlined for each award: the Kushlan Research Award has a focus on Ciconiform biology and conservation; the Nisbet Research Award supports contributes to the conservation

of gulls and terns; and the Waterbird Society Research Award encourages significant advances in the biology, ecology, status assessment or conservation biology of waterbirds. The committee strives to be fair and thoughtful in determining the potential impact, quality, and feasibility of each proposal, while increasing the opportunities for research throughout the World.

Journal and Publications Committee - The priority of the Publications Committee is to encourage/promote and disseminate diverse, original, and high-quality research in waterbirds as well as to provide oversight for the peer-reviewed journal, *Waterbirds*, and all developments related to the journal. The Publications Committee also provides support for the editor-in-chief and managing editor of the journal as requested.

Communication and Outreach - The focus of the Outreach & Communications committee of the Waterbird Society is to engage the community by sharing waterbird conservation information and promoting research on waterbirds and their habitats.

Future Meetings Committee - By identifying a target location and an eager, local chairperson for each Waterbird Society's Annual General Meetings, the Future Meetings Committee endeavors to create a portfolio of accessible and intellectually stimulating locations that enhance the experience of information-sharing and professional development for our members.

Conservation Committee - Thriving waterbird populations are an invaluable part of our natural heritage and critical indicators of environmental health. Science-based management is vital to the long-term sustainability of birds in wetland ecosystems. Our priorities are to provide expert support to conservation practitioners, to advocate for scientifically sound policies at all levels of government, and to recognize and honor outstanding efforts in the field of waterbird conservation through publication and presentation awards.

Membership Committee - The Membership Committee is guided by the principle of growing a diverse and vibrant community of professional waterbird ornithologists and waterbird enthusiasts.

Student Activities Committee - One of the Waterbird Society's greatest strengths is its ability to welcome and nurture students as they begin their careers in waterbird science and management. Generating energy and engagement among student members is key to creating a diverse and welcoming community and to ensuring the long-term sustainability of the Society. To fulfill the Society's mission of enhancing opportunities for professional development, the Student Activities Committee seeks to provide opportunities for students to develop their skills and networks, both by organizing student activities as part of the Annual Meeting and by identifying opportunities for student engagement year-round.

Diversity, Equity and Inclusion (DEI) - Fulfilling the Waterbird Society's mission to cultivate a diverse and welcoming community through equitable and inclusive values and practices requires dedicated attention. Representation, outreach, the development of interpersonal relationships, and consistent funding of DEI efforts are key for the recruitment and retention of a diverse membership. We believe it is the collective responsibility of the Waterbird Society and its members to ensure accessibility and foster a sense of belonging for all who choose to participate.

Strategic Planning Committee's key recommendations as they relate to the four goals articulated in the Mission Statement, which committees are involved, and which committee should take the lead. (S1 - Supplementary Material, i.e., [SMART Framework](#); MS - [Member Survey](#)):

1. Promote basic and applied research on waterbirds and their habitats

- Discuss and find consensus from council on "a spending philosophy" (S1). Finance & Investment (Lead), Student Activities, Grants & Awards Committees
- Expand opportunities for Early Career researchers and advanced students to serve as reviewers (S1). Journal and Publications Committees (Lead)
- Continued discussion of online early and open access opportunities (S1). Journal and Publications
- Delegate communication responsibilities between Waterbird Society handle vs Waterbird journal handle - use bot to automatically retweet journal account

2. Foster science-based waterbird conservation globally

- Formalize a communications strategy that addresses conservation policy, etc. (S1). Conservation (Lead), Communications and Outreach, Grants & Awards, Journal and Publications Committees
- Formalize a decision-making process to fund Ornithological Council¹ and identify funding expectations (S1). Finance and Investment Committees (Lead), Treasurer
- Consider the opportunity for seeking an endowed award for conservation in under-developed countries [We need to develop a definition for what this category encompasses]. Determine if an endowment can be subsidized or must be self-funded (S1). Finance and Investment Committees (Lead), Treasurer, Grants & Awards Committees
- Record letters sent by the conservation committee. Conservation (Lead), Archives, Communications and Outreach committees
- Encourage members to submit opportunities for conservation committee advocacy or education (MS). Conservation (Lead), Communications and Outreach committee
- Explore strengthening partnership with Birds Caribbean. Conservation (Lead), Nominations, Membership committees
- Promote international engagement, perhaps through a small subgroup of members (MS). Council will determine if this is a new ad hoc committee.

¹ WbS contributes \$6000 of the \$39,250 annual budget (15.3%) while AFO and WOS each contribute \$10,000 annually

3. *Enhance opportunities for information-sharing and professional development*

- Revise the WbS Handbook and approve it by Council vote to enhance inter-committee collaborations, eliminate Council's current reliance on institutional memory, and improve the accessibility of Council work to new/incoming members/Councilors
- Expand Editor interactions with members at meeting (e.g., coffee with Editor; S1) Journal and Publications (Lead), Local Meeting Committee
- Continue creative approaches and expansion of reach already underway with the new editor and managing editor. Journal and Publications (Lead)
- Develop or join a mentorship program for students to meet with society members outside of meetings and foster ongoing mentoring relationships (S1). Student Activities (Lead)
- Develop a formal and active communications strategy that details how WbS communicates to the public (S1, MS):
 - Discuss specifically who our outreach audiences are (academics, non-academics, underrepresented communities, etc.) (S1). Council (Lead)
 - Discuss and develop a strategy of outreach for each type (social media, website, conference outreach) (S1). Communications and Outreach Committee (Lead)
 - Consider a social media management software option to coordinate social media platforms (MS). Communications and Outreach Committee (Lead)
 - Develop an approximate schedule for how often outreach should be conducted (quarterly, trimonthly) for each type of outreach discussed (S1). Communications and Outreach Committee (Lead)
 - Create a directory of society members and/or meeting registrants and share with members/registrants to facilitate communication and networking (S1). Local Meetings Committee (Lead), Membership
 - Develop a strategy for conference marketing and local/regional press coverage (S1). Communications and Outreach (Lead), Local Meeting Committees
 - Update website materials annually; develop a process to routinely acquire updates from committees (S1). Communications and Outreach (Lead), Conservation, Nominations, Student Activities Committee, Grants and Awards, Journal and Publications, DEI committees
 - Consider crowd-sourcing material for a quarterly newsletter or blog (MS)
 - Translate website/conference documents to accommodate international members (S1). Council (Lead - to decide what should be translated); Communications and Outreach committees; Membership Volunteers
 - Define and enhance benefits of membership (S1). Membership (Lead)
 - Create a fact sheet or informational poster for students (what is the Waterbird Society, why be part of it) and distribute to institutions (S1). Membership (Lead), DEI committees
 - Coordination between Membership Committee and other committees. Specifically to support the Membership Committee's role in tracking membership types, geographic distribution, and diversity, we also recommend updating the membership application to include additional, optional demographic information (S1). Membership (Lead), DEI, Student Activities, Nominations committees.

- Provide one year of membership as part of student meeting registration. Also provide free or reduced-cost membership renewals for student and early-career members (S1). Membership (Lead), Finance and Investment, Local Meeting (?) committees
- Increase student travel award funding. Offer a certain number of application-based fellowships to promising students that includes covering the cost of meeting travel, potentially paired with a year-round mentoring program (S1). Student Activities (Lead)
- Create an early-career professionals travel award that includes covering the cost of meeting travel, potentially paired with a year-round mentoring program (S1). Grants and Awards (Lead)
- Consider the following items with regard to annual meetings:
 - An annual meeting council member should be on the local committee to make meeting integration better. Council (Lead)
 - Require local meetings to have a committee of professionals in our discipline, and to avoid using a stand alone travel/government agency. Future Meetings (Lead)
 - Translate the local meeting handbook into Spanish Council Communications and Outreach (Lead)
 - Bilingual website for all annual meetings. Communications and Outreach (Lead)
 - Consider non-North American regional meetings (e.g. Taiwan model). Probably not supported financially? Could this grow the society internationally? Future Meetings and Council (Lead)
 - Continue discussion on the Pros/Cons of maintaining hybrid options. Council (Lead)
 - Continue the recognition of the importance of non-North American meetings. Future Meetings and Council (Lead)

4. *Cultivate a welcoming community through diversity, equity and inclusion.*

- In general, increase inter-committee communication and collaboration and identify additional collaboration opportunities and gaps (S1). Vice Chair (Lead) and all committee chairs
- Engage the consulting services of a DEI officer to assess the current landscape of the Society, assist with the development and implementation of a strategic action plan with clear objectives and performance metrics, and gather and facilitate incorporation of feedback and suggestions from members (S1). DEI (Lead)
- Work with meeting organizers to identify local colleges, community colleges, and high schools near the meeting location. Contact them with meeting information. Offer free or reduced-cost one-day registrations to targeted groups of undergraduates (e.g., ornithology classes) (S1). Local Meetings Committee (Lead), Membership, DEI
- Publicize the code of conduct (S1). Governance (Lead), Communications and Outreach
- Identify a Society liaison who members can go to with issues. Create a

pathway for anonymous reporting and action (S1). Governance (Lead)

Below are recommendations that do not easily support any single objective but are the result of the strategic planning process. These are related to the Governance of the Society, Finance and Investment, and Nominations Committees.

Governance Policy and Procedures. SP recommends the following:

Devise mechanisms to improve communication and strategic collaboration among committees.

- Host a committee chairs' meeting during the annual meeting to facilitate shared goals and communication among chairs. Officers and Council (Lead)

All important documents of the Waterbird Society should be housed in the Waterbirds Google Group Drive with email communication cc'd to the archive email.

- The WbS Operating Manual must be updated annually.
- Executive Officers (President, VP, Treasurer, Secretary) collaborate to house this and other essential documents in a Google Drive available to Council and Committee Chairs.
- President and Officers update after the annual meeting, and distribute to incoming Council members and chairs.
- Some committee practices should be added to the policy/procedures manual (e.g., priority of non-north american/EU candidates; Council Inclusiveness document from DEI committee; Nominations Committee shall work with the Archives Committee to preserve the final ballot/nominee list for the archives at the end of every election).

Committee Co-Chairs should be identified by the committee and then voted by Council to align with bylaws language (S1).

DEI committee should become a standing committee. (Discussed and approved by Council during SP process Spring 2023).

Council should continue to include at least two international (non-US and Canada) members.

- The society devises fund assistance for active non-US/Canadian council members, so they can participate in person. The society will continue to provide such assistance (MS). Council (Lead)
- Hybrid council meeting options can facilitate participation of all members for whom travel is impossible. When financially viable, hybrid annual meetings or events could increase participation opportunities. Council, Future Meetings, and Annual Meeting committees.

General Finance and Investment Policy and Procedure. SP recommends the following:

Reduce the workload of the treasurer position and establish continuity to ensure continued stewardship of society finances toward stated goals.

- Restructure the position of Treasurer (S1).
 - a. Hire a bookkeeping consultant (S1).
 - b. Expand the number of WbS members participating in financial decisions (S1).
- Initiate a training period in preparation for long-time treasurer retirement (S1).
- Implement a special project cycle (similar to our grants and awards) with annual/bi-annual deadlines from Committees/Council for Council review. Identify Initiatives vs society infrastructure. Develop a form to be used (with word limits).

“S1” refers to the [Smart Analysis Framework for Strategic Plan](#). Please refer to this document for details including the timeline arranged by the SP Committee.