RTC Staff and Research Techs Strategic Planning Meeting  
September 11, 2015  
9am to 1pm  
BCC

- Heidi intro: Ground rules, introductions (what does everyone want to get out of today (on flipchart)), walkthrough of ladder of feedback
- Karina presentation:
  - Seeing RTC in context
    - Learning from National reports and SF State strategic plans
      - Challenges for marine labs-integrating university and lab needs and cultures, infrastructure, operational stability, creating and leveraging networks, ID of performance indicators, communicating the value of marine labs
    - State and regional needs
  - Strategic plan
    - Mission, vision, goals, and values
    - Initial rough draft by Karina, 3 day long retreats with faculty, solicit staff and stakeholder input over fall
    - 3 overlapping goals: Research, education, and public engagement
    - 5 guiding principles: Courage, Life of the mind, Equity, Community, and Resilience
    - Goals < Objectives < Strategies
- Ladder of Feedback Questions:
  1. Clarifying questions:
    - Name change happening with this? Yes
    - Are we becoming a dept? Exploring it
    - Who owns the property?
    - Specific
    - How to incorporate estuarine research?
    - More funding?
    - Doc for public distribution?
    - Public resource, what do we get out of it?
    - Student housing on campus? Included in a lower level in a strategy
  2. Strength comments:
    - Desire for increasing collaboration
    - Focus on training the next generation of future scientists
    - Emphasis on environmental stewardship
    - Funding for facilities and marine opps
    - What we offer to students and people working in the Bay
    - Capitalize on being the only marine lab in the Bay
    - Interdisciplinary response to the changing environment
  3. Concerns:
    - Lack of clear steps to reach goals
• Timeline? Pretty lofty goals-infrastructure needs-Working between other groups to come up with a realistic timeline, pushback from other groups
• Prioritization of goals
• Campus support
• Missing components of a strong strategic plan
• Too much land to financially support
• As a CSU can we really protect the environment here?

4. Suggestions:
• How does each lab fit into the roadmap?
• Be consistent with terms (Bay vs. estuary)
• Breadbox
• Center for excellence-higher up in the core themes

○ Follow up questions for Karina:
• Next steps, similar approach for business and facilities plan? Business with the dean and then break it down to smaller groups. Spring for both. Vision first.
• Food services on site?
• Some infrastructure first
• Meeting with PIs? Meeting with each group first and then all together later
• Karina’s umbrella plan: Strategic plan > Business plan > Facilities plan
• Academic plan? Some steps being taken towards that
• Incorporation with main campus’s teaching plan, credential program? Has not come up and added to suggestions
• Academic plan could drive the facilities plan (academics could dictate the necessities of the facilities plan)-Has to come out of the faculty group, need a department, may become a department. Structural issue.
• Supporting plan, collection of thoughts, background document to summarize thoughts and input not in strategic plan
• Dept. vs. independent field station? Department is the most appropriate for planning. Field station status is isolating. How to meet needs and benefit from connection to campus.
• Marine lab vs. field station? Marine lab may not exist as a classification in the CSU. It is campus vs. field station.

• Group Presentations:
  ○ Research:
    • Prioritize-who, what, and how (prioritizing goals, who does it, how does it happen), solid timeline, focus on sustainable funding
    • Collaboration-Research techs
    • Facilities-Access to water, RTC tech
  ○ Education:
    • Grad student support-strength as it was mentioned in strategies and also as a concern as we need more advising and mentoring
    • Facilities for education-classrooms, housing, transportation
- Connection to main campus-they don’t know who we are, encouragement of students from main campus to take campus at rtc
  - Outreach:
    - Have a good outreach program-expand
      - Demographic? Age group, citizen science,
      - Staffing/facilities-make sure we are communicating science well, visitors center, training
      - Development and collaboration with SFSU-common message with SFSU, something everyone understands
  - Input on the process:
    - Could have had more time to make it an all day thing
    - Once the plan goes through everything then come back into small group again for specifics-in project phase
    - Great exercise-good ideas came out of it-THANKS KARINA!
    - Has this been enough input?
      - Group should be involved along the way
      - Need for continued engagement
  - Closing remarks:
    - Big revision>then come back again>final round of input with as many people as possible
    - Electronic forum-Blog where notes are accessible and you can enter comments anonymously
    - Detailed planning in staff meetings-group specific
  - Closing questions/remarks:
    - Support for blog
    - Provide dean and provost the comments from the stakeholders
      - Inform on the priorities to staff/faculty/students here
    - Downsides to becoming a department? There are resources and allows for more autonomy. Comes with more responsibilities. Not sure if that’s the right path forward, but we seem to be hitting barriers without that structure.

- Transcribed Flipchart notes:
  - Ground Rules:
    - One person speaks at a time
    - Build on ideas
    - Be respectful
    - Of others
    - Use of electronic device etiquette
    - Follow directions of facilitator
    - Speak into microphone
    - Stick to time limits
  - What are we hoping to gain from this in one word?
    - Direction
    - Information
- Clarity +
- Brevity
- Needs
- Communicate to board
- Knowledge
- Progress
- Ideas
- Hope
- Detail
- Rejuvenation +
- Inspiration +
- Collaboration +++
- Learn
- Growth
- Understanding
- Community +
- Understanding
- Progress +
- Lunch
- Insight
- Momentum

- Ladder of feedback - All staff:
  - What clarifying questions do you have about the strategies presented - mission, vision, core themes
    - Will there be a name change to go along with new mission and vision?
    - Are we becoming a department? Please elaborate
    - Who "owns" property? UPM or RTC?
    - Any specific public vacuum we would fill?
    - The terms "sea," "marine," "ocean"... How does "estuarine" "freshwater" get incorporated?
    - What is the outlook for getting more funding?
    - Where is the rest of the "environment" research group?
    - If we are a resource for community awareness, where does "what do we get out of it" come in?
    - Will document be edited/ (??? Can't read this word, think it may be crossed out) for public distribution?
  - What comments can you share about the strengths of the mission, vision, and core themes?
    - Collaboration
    - Training next generation of scientists
    - Emphasis on stewardship and community engagement
    - Funding for facilities and marine ops
    - Great resource for community
• Unparalleled access to the Bay environment
• Strategically positioned on the Bay as the only marine lab on the Bay
• Transdisciplinarity
• Bringing more students
• Breadth of themes is fitting to RTC-covers 3 main focus areas well
• Community input and feedback-nice to be part of this

What comments can you share about your concerns?
• Lack of clear steps to reach our goals
• Timeline
• How will we prioritize?
• Campus support
• Too much expensive land to maintain. If we could sell off some of this land and use money to build up RTC
• Can a CSU make recommendations to protect the environment?
• Scientific/research themes are heavily applied-perhaps need one geared toward understanding without applied aspect
• Flexibility is stressful for staff-need direction to plan for space, staff, etc.
• Need academic plan to help direct-how to design buildings and spaces
• Lack of road map business plan and facilities plan
• Lack of road map
• Collaboration strategies-what’s the plan?
• Can we make an “exit strategy” in 10 years if there is no change at RTC?
• Neighbor’s concern with noise and traffic during building out of site

What suggestions can you make for improving the mission, vision, and objectives, core themes?
• Clarifying each role of the ‘roadmap’
• Including estuary as focus
• How big is each “box”-Define depth, quantify, timing, etc.
• Center for Excellence
• Community building. How to engage our own people to feel part of the community
• Will student housing be included
• How we can be self-sustaining –Friends of RTC?
• More specifics i.e. academic plan, business plan, facilities plan, fundraising?
• Food services on-site
• Pre-needs: Electrical, sewage, security
• Collaboration with SFSU’s credential single subject program
“Supporting plan” document to summarize, add details discussed and timeline goals not appropriate in strategic plan

Become a “marine lab consortium” with CSEB, CSUS, Cal maritime

- Ladder of feedback-Individual groups:
  - Outreach:
    - What clarifying questions do you have about the strategies presented?
      - Staffing question and location of activities? And implementation of timeline * ++
      - Is there overlap with development? ++
      - Visitor center? Self or tour guided-where? *
      - Target audience? Age groups? +++
      - How broad does public engagement go? How far from RTC/SFSU? +
      - Plans for on-campus engagement on a regular basis? +
      - More detail on prof. development?
      - What specific “hole” is our outreach trying to fill and how?
      - Write definition of Rosenberg institute
      - How to incorporate staff/techs for buy-in and experience
      - Is the end goal to teach, or funding, or something else?
      - What does “Realize the full potential of being located on the shore of SF Bay to enhance community participation and awareness” mean?
      - How to increase visibility of RTC? what are we doing right? Wrong?
      - How will the “go-to” source of info on SF-Bay be implemented?
    - What comments can you share about the strengths of these strategies?
      - Art & science connection *
      - Walking tour plans! *
      - Community involvement *
      - High school internship program *
      - Volunteer program
      - Real time dispensation of RTC research
      - I felt the strategies were clear and doable
      - Natural history blog!
      - Connective with local schools/teacher
      - Point of data info for bay/estuary
      - Citizen science
    - What comment can you share concerns?
      - Train staff/PIs/Techs/Students for collective outreach ++
      - Elevator speeches... workshops, training, town halls +
      - Who will carry these plans specifically? (Staff, PIs,
Facilities) * +
  o Fundraising needs to encourage outreach *
  o Common message with focus on your area’s strength *
  o Logistics of organizing the outreach team
  o How to manage QA Data. How / who?
  o Social media good but only when done well
  o Expectations for current staff time, participation?
  o Outreach to development
  o New mission and new name! Who are we? RTCFES
  o Staffing, time, for all of these ideas?

- What suggestions can you make for improving the strategies?
  o Reinstitute grad student experiments @ discovery museum (paid public outreach)
  o Researchers need to be trained to do outreach * +
  o Student outreach as part of grants +
  o Forming committees for specific outreach +
  o New name * +
  o Database of people/contacts
  o Development/RTC plan to publicize RTC through outreach- needs teamwork
  o Feedback to community is important ‘why does this matter? What does the research mean for me?’
  o Learn to blend RTC outreach with requirements that grants have for outreach
  o Offer classes to community to improve visibility and identify potential donors
  o Science-savvy facilitators for effective outreach
  o Tech-savvy outreach ideas
  o Re organise staff to support outreach
  o Science communication class for researchers, scientists, etc.
  o Citizen science promotion
  o Town of Tiburon “new” historical signs-ask to fund RTC sign
  o Symposium-each lab do mini ignite talks for general public not for scientists
  o Educate about our financial need-Donation thermometer “Here is how you can help”
  o Interpretive signage for public visitor space at RTC- Web Kiosk

- Outreach-Main Points:
  o Demographic?
    ▪ Age groups
    ▪ Citizen science
    ▪ Current assortment of onsite/offsite programs are great
Staffing/Facilities
- Outreach positions vs. students, techs, PI’s
- Teach/train scientists how to teach/communicate science
- Visitor center

Common message
- Cross train all at RTC
- Elevator speeches
- *Teamwork with development!!

- Research:
  - What clarifying questions do you have about the strategies presented in this section?
    - Fund new faculty positions plan?
    - Space for new faculty? +
    - Diversification of faculty-“Transdisciplinary” Who gets to decide? Can everyone make suggestions?
    - Looking for more specifics- “state of the art??”
    - Timeline for growth? + *
    - Is strategy to dream big and go after money to make it happen?
    - How prioritize objectives?
    - How many new faculty over what period of time?
    - “How” of collaboration. Serc/NERR/ RTC-IT, storage facilities, etc.
    - Faculty, discipline, field? Process for identifying?
    - What is tiered research mentoring?
    - Who is identifying gap? Faculty? SFSU? Community? *
    - PhD option?
    - What is “criteria based access”?
    - How do we fundraise without an academic plan?
    - Criteria based access for interns(??), too?

- Comments can you share about the strengths?
  - Aspirational-leaves a lot of room to expand
  - Inspirational goals! Reach for the stars!
  - Cost to use equipment is still low
  - Recognize post docs as resource **+
  - Focus on innovation collaboration future thinking
  - Prioritizing new lab space
  - RTC is not a rust bucket! Collaboration on/with equipment
  - Shared lab/equip resources
  - Upgraded facilities-wetlands center, shared facilities, monitoring
  - Upgrade marine ops-More than 1 operational boat!
  - Great cross trainings of students between labs!

- What comments can you share about your concerns?
- Marine geo should be added to ‘enhance monitoring capabilities’ and collaboration
- Shared equipment/space-hire tech, define space, define needs, etc. –Basic(?) plan
- We’re not the lab we could be –i.e. access to water, pier
- Need good access (onsite) to water to be a first rate marine lab ++
- How will objectives be prioritized? Or decided on? Lots of things that need money *
- No support / stability for techs +
- Fundraising for consistent long term monitoring
- Action plan?
- Development/fundraising staff, support, plan?
- Safety concerns about aging equipment and facilities
- Need a development officer for RTC to help get funding **
- Funding for research “For facilities identify diff. sources”
- Increase outside visiting research/collaborations facilities?
- Resources?
- Staffing for communicating research findings? Resources?
- Oversight/tech in shared equip/resources. Need tech or lead PI (time base)

- What suggestions can you make for improving the strategies?
  - Counter parts at other marine stations and institutions need more interaction for staff, etc. to integrate, find support, find support, buy-in
  - WAML CENCOOS COAST
  - Strengthening collaboration of the estuary
  - Timeframe timeline prioritizing *
  - Marine ops partnership
  - Dedicated fundraiser at RTC F/T
  - Bringing in more outside visiting scientist artist in res. Etc.
  - Sponsoring for work visas (not just J1) for research tech/postdocs +
  - Share expensive scientific resources (boats, equipment, etc.) space
  - Increase web-based/digital info exchange
  - Internal communicating research
  - Creating a position for RTC technician that manages common use equipment
  - Include technician support in strategic research ++
  - Improve tech position/classification-permanent rather than temp. ++
  - RTC/website could lead an effort to build a global calendar of all projects/cruises on the Bay: What is collected? Opportunities to collaborate? Piggy backing opportunities?
• Research-Main points:
  o Prioritize
    ▪ Who, what, how?
    ▪ Timeline
    ▪ Sustainable funding
  o Collaborate
    ▪ Post Docs, partners
    ▪ Research techs
  o Facilities
    ▪ Access to water
    ▪ RTC tech

• Education:
  • What clarifying questions do you have about the strategies presented?
    o Elaborate on housing plan? **
    o How RTC fits into SFSU and CSU as a whole? **
    o What will we do to support REU and Star? *
    o What has been our FT student ratio over last 10 years? *
    o Are we directed by research or education? ++
    o How do we have input on recruiting new students?
    o Detail on: Classes and Classrooms. Define curriculum to
direct facility use. +
    o Dorms-possible? Timeline? Cost/benefit?
    o Future focus on Master’s vs. undergrad. Define growth in
both.
  • What comments can you share about the strengths of these strategies?
    o Inclusion of SEPAL & CSME for improving science teaching
      *
    o Student infrastructure-strength
    o The RTC community
    o Competitive student awards (and understanding value for
      CV’s and reputation) is important
    o Leveraging relationships already on site *
    o Skill building prof. skills in grads
    o Becoming an academic department as priority
    o Professional development for students is great to see
      included-especially considering the applied science focus of
      overall themes *
    o Addresses funding for students as a goal/strategy
    o REU/STAR strength! Great program
    o Improved access to increase undergrad presence
    o Technology based classes-using technology
  • What comments can you share about your concerns?
    o How to add an academic plan *
Concern-grad students need too much time to complete degree **
Transportation *
Utilize the Questuary and boats in education-under utilized
Need to raise visibility of RTC at SFSU among students, campus comm.
Onsite grad student advising support
Need a way for students to evaluate their PI
What are drawbacks of becoming a department?
Transportation/housing (short and long term) for students (improved access, higher attendance)

What suggestions can you make for improving the strategies presented?
More focused coursework for graduate students
Main campus exposure
Ensure support for grad students
Mini-discovery day on campus to enhance exposure to students *
Better communication between departments-main campus *
Evaluate PI's for performance-Laggers do students a disservice (as much as stars inspire students!)
Collaborations with cal maritime-tour exchange with cal maritime
More visiting faculty/lecturers
SFSU class field trips to RTC
Shuttle with fixed schedule-for whole community
Need training for PI's to become good mentors
Realistic room, space, resources of labs-criteria for support*
Alumni job fair *
More funding support for students
Research tech & staff professional development
Connect with NAML network for Education
Adopting COAST guidelines to guide how RTC interacts with students from other institutions
Increase job opps for students in labs/RTC

Education-main points:
Clarifying questions:
Teaching facilities & housing
More detail?
Facilities plan in 2016-sync with strategic plan
Academic plan/curriculum needs more clarification/plan
o Strengths:
  ▪ Emphasis on undergraduate education
  ▪ Inclusion of grad student financial support

o Concerns:
  ▪ Transportation
  ▪ Grad student support: mentorship and program advisors (improving timeline/focus)

o Suggestions:
  ▪ Mini D-day
    ▪ Main campus exposure
  ▪ More collaborations
  ▪ PI reviews (by students)

o Take home messages:
  ▪ Prioritize
  ▪ Collaborate
  ▪ Facilities ***
  ▪ Grad student support
  ▪ Connection to main campus
  ▪ Define demographic
  ▪ Staffing
  ▪ Common message