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Thank you for serving the Ecological Society of America as the chair of your section or chapter. While your position comes with great responsibility, it also comes with tremendous opportunity. During your term, you will be leading members who share your specialty or work in your region, helping to advance the work of the Society and the field. You will be a steward for the members of your section or chapter, and for the development of their work and careers, all of which enhances the health of ESA.

This document provides a detailed overview of necessary aspects of chairing a chapter or section of the Ecological Society of America. It lists points of contact at ESA Headquarters for a chapter’s or section’s management, plus guidelines, recommendations and instructions for carrying out various functions as a chair. Topics included relate to budgets, governance, reporting, the ESA Annual Meeting, digital tools at your disposal (website, email, online community, social media), advocacy and social media activities, and instructions for managing your chapter or section’s website (if hosted by ESA).

As chair of your chapter or section, a leader of your peers, you are responsible for ensuring your organization’s adherence to these guidelines in addition to the bylaws of your section or chapter and ESA. You will oversee the use of your chapter or section’s funds, its official communications and its resources to further the work of the Society and its members. ESA Headquarters staff are happy to assist with any questions, or with helping you to manage logistics. Points of contact for each area of work are listed throughout this document; top-level concerns are listed in the section below.

**KEY CONTACTS**

For information on budgets or any other financial matter, contact Liz Biggs ([liz@esa.org](mailto:liz@esa.org))

For questions on any aspect of the Annual Meeting, contact Christi R. Nam ([christi@esa.org](mailto:christi@esa.org))

For registration/exhibit questions, contact Maya Sohn ([exhibits@esa.org](mailto:exhibits@esa.org) / [maya@esa.org](mailto:maya@esa.org))

To obtain a current list of section or chapter members, contact Maya Sohn ([membership@esa.org](mailto:membership@esa.org) / [maya@esa.org](mailto:maya@esa.org))

For membership and certification questions, contact Jonathan Miller ([membership@esa.org](mailto:membership@esa.org) / [jon@esa.org](mailto:jon@esa.org))

For website questions, contact Gordon Potter ([webmaster@esa.org](mailto:webmaster@esa.org) / [gordon@esa.org](mailto:gordon@esa.org))

For questions on Long Range Planning Grants or any other questions about the society, contact Catherine O’Riordan ([coriordan@esa.org](mailto:coriordan@esa.org))

**SECTION BUDGET INFORMATION**

- ESA Sections and Chapters may not collect any money for any purpose without consulting with ESA’s CFO Elizabeth Biggs, liz@esa.org.

ESA Sections and Chapters are allocated $5 of per year of dues collected from each member in joins that unit.

ESA maintains detailed records of each chapter and section budget. All of the chapter/section dues are included as income and any expenses on behalf of the chapter/section are listed as expense. The balance will carry forward if it is not completely spent in any year. Because dues are received throughout the year, please request an updated budget whenever needed.

- Please contact ESA’s CFO Elizabeth Biggs at any time if you would like the status of the amount of money in your chapter/section budget.

- If a chapter or section receives a Long Range Planning Grant those funds are tracked separately and do not carry over at the end of the fiscal year. If you would like a status of how much has been spent on a long range planning grant, please contact ESA’s CFO Elizabeth Biggs.
HOW FUNDS MAY BE USED

Chapter and Section funds may be spent on any activity related to the activities of the chapter/section if approved by the chair of the chapter/section. They may not be used to reimburse chapter/section leadership for any travel or time spent on chapter/section activities.

HOW TO REQUEST PAYMENTS BE MADE OUT OF THE CHAPTER/SECTION BUDGET

• When requesting a payment be made out of a chapter/section budget please fill out the Chapter/Section Check request form. The form must be signed by the Chair of the chapter/section and then sent to Elizabeth Biggs in the financial office at ESA. If the payment is for a purchase of goods or services (such as a plaque or banner or book) please attach a copy of the receipt.
• If the payment is to an individual and is over $600, we will need the social security number of the individual and a Federal W-9 form will be issued.

Financial Forms: Please see attached Chapter/Section check request: http://www.esa.org/esa/?post_type=document&p=9081

LONG RANGE PLANNING GRANTS

The ESA yearly budget contains funds for long range planning grants. Sections, Chapters and Standing Committees are eligible to apply for these funds which are to be used for projects that move the Society towards long range planning goals. Only one application from a Section, Chapter or Standing Committee is permitted.

The call for the grant proposals is issued in the fall and sent directly to Section, Chapter and Committee Chairs and includes the application form and the criteria for the awards. Proposals are generally due in late fall. Proposals are evaluated by a subcommittee of the Governing Board and those awarded grants are notified in the winter. Reports on the progress of the activities supported by these grants are due in August at the time of the ESA Annual Meeting.

To request payment for activities related to long range planning grants, follow the guidelines in the financial section of this document.

ELECTIONS AND LEADERSHIP / MEMBERSHIP UPDATES

Each section holds their own election according to their own bylaws. ESA will provide a list of members. (See Communication with your Members) The Member Services Office can assist with a section’s election.

Each section has its own bylaws. Section Chairs are responsible for providing a copy of the bylaws to ESA. Bylaws must also be posted on the section’s website. ESA can provide a template for a section’s website. Please send them to george@esa.org or esahq@esa.org.

Each section is to provide an updated leadership list immediately after its elections. ESA will request this information after the Annual Meeting.

EVENTS

If a chapter or section chooses to hold a meeting or other event at a time other than during the ESA Annual meeting, please contact Christi R. Nam in the business office at christi@esa.org. Staff at HQ will need to know the particulars of the meeting or event being held. Because of liability issues, additional insurance may be required which would need to be paid for out of the chapter or section budget. In addition there may be other issues that need to be addressed by ESA staff.
COUNCIL MEETING / ANNUAL REPORT

Each year ESA requests a brief annual report from the committee, section and chapter chairs. Reports are distributed during the Annual Meeting and published in the Bulletin after the meeting. The deadline for these reports is mid-July. You will be given detailed instructions on where to send the reports and the exact deadline date in the spring before the Annual Meeting. Section and Chapter chairs are members of the ESA Council which meets every year during the Annual Meeting from 2-5 PM on the first Sunday of the meeting. Preceding the council meeting is an orientation for new council members from 1-2 PM the same day. Notices about the location of the meeting are sent in advance of the meeting. Chairs who cannot attend the meeting are welcome to name a substitute by notifying the Executive Director.

ANNUAL MEETING

BUSINESS MEETING AND MIXERS

It is the responsibility of the Chairs to work with Meetings staff to organize a mixer and/or a business meeting to be held at the Annual Meeting. Information will be posted on the Annual Meeting website about when to submit your event request and along with all deadlines. You will be informed of the money you currently have in your section budget. This money is to be used to pay for any food or drink provided at the mixer or business meeting.

Business meetings can be held Monday through Thursday mornings from 7 am to 8 am or 9 am; lunch time slots run from 11:30 am to 1:15 pm; and evening slots run from 6:30 pm to 8 pm, Monday through Wednesday. Evening slots are usually used for mixers, and often a section will combine a mixer and a business meeting.

EXHIBIT BOOTH

Sections and Chapters are offered the opportunity to have a booth in the exhibit hall free of charge. The Chair is responsible for deciding whether or not to have a booth. The booth needs to be staffed during show hours of 11:00 am to 6:30 pm, Monday through Thursday. Setup time for the booth is either Sunday from 10 am to 5 pm, or Monday 7 am to 9:30 am. Tear down time for the booth is Thursday 6:30 pm and must be completed by 9:30 pm. Section members are responsible to pack up their booth, anything left in the booth after 9:30 pm will be discarded. Any financial activity must be coordinated one month in advance with the CFO (liz@esa.org)

PROMOTION

Sections and chapters can help us promote our Annual Meeting and encourage members to attend through newsletters or emails to your membership. Sections and chapters can also promote their own meetings, awards and other business. Please connect with ESA Director of Membership and Communications Jonathan Miller (jon@esa.org) and ESA Membership Associate Maya Sohn (maya@esa.org) to coordinate.

SECTION AWARDS

Sections offer awards that tie in with the Annual Meeting and often are based on oral or poster presentations, as well as a suite of benefits and services offered to their members throughout the year (e.g., newsletters, events, mentorship). ESA will contact each of the Section and Chapter Chairs in the early Fall to survey them about their benefits offered and remind them to provide ESA with their awards information. This information will be posted on the ESA website under the Awards tab, and will be included in membership marketing materials.

PROPOSAL REVIEW

ESA’s Program Committee relies on ESA’s leadership for help assessing proposals for Symposia, Organized Oral, and Organized Poster Sessions for each year’s Annual Meeting. Appropriate broad-based peer review of these proposed sessions is critical in order to maintain the high level of quality expected of these sessions at ESA meetings. Reviewers include the Annual Meeting Program Chairs, Section and Chapter Chairs, and members of certain Standing Committees. Each proposal will receive the attention of several reviewers. The input of Section and Chapter chairs as reviewers is extremely helpful as the committee decides which sessions will be accepted for the meeting program. Proposal review
is one of the primary ways that sections can assist in developing the meeting program and represent the interests of the membership.

ESA will send out a request for reviewers around the submission deadline. Reviewers typically are asked to review 10-12 proposals over 3 weeks in October. Please note that chairs are still eligible to be a reviewer even if they have submitted or endorsed a proposal. ESA will avoid assigning to you any proposals in which you are formally involved, and you will be able to opt out of reviewing any proposals that present a conflict of interest.

CHAPTER SECTION WEBSITES

Many of the ESA chapters/sections have websites hosted at esa.org. Hosting with ESA helps to unify common brand elements, reduce costs and ease maintenance.

The ESA webmaster can provide some technical assistance, but each chapter or section is responsible for administering its own content updates.

All other web related inquires can be sent to the ESA webmaster, webmaster@esa.org.

COMMUNICATION WITH YOUR MEMBERS

Mailing/email list of the chapter/section members can be requested from Maya Sohn, Membership Associate (maya@esa.org). Alternatively, you can also send your text to her and she will send it for you to your members. Please allow 3 to 5 business days to process your request. Because members join and renew throughout the year, please request an updated list whenever needed. On occasion, you may be asked to assist with membership renewal of your section members. Each message must contain a link to the unsubscribe page.

Chapters and sections bear the responsibility for the content on their websites and social media as well, including the monitoring (and, if need be, moderating) of interactions on those channels.

ONLINE COMMUNITY

ESA has launched an online community on the GoLightly platform (community.esa.org). All ESA members have access to the community, as do non-members who had previously subscribed to the ECOLOG-L listserv. Communities unique to members of each chapter and section have been set up within the master ESA community. It is recommended that chapters and sections use this platform to share and seek information in conjunction with other business efforts.

GoLightly allows group members to message each other similarly to a listserv, as well as share documents, schedule events, blog and connect directly with others in the group. While it will serve primarily as an updated listserv for the ecological community at large, the private section and chapter groups will be able to use GoLightly as a platform for communicating about section and chapter business, and collaborate on projects.

Training will be provided to chapter and section leaders; connect with ESA Director of Membership and Communications Jonathan Miller (jon@esa.org) with any other questions.

SOCIAL MEDIA

Annual Meeting Social Media Guidelines

ESA encourages open discussion on social/new media outlets at our Annual Meeting. In order to find a balance between the needs and expectations of members and make the meeting a safe and comfortable space for everyone, we set forth the following guidelines:

- Please keep in mind ESA’s Code of Conduct for events (https://www.esa.org/esa/meetings/esa-meetings-code-of-conduct/) and apply it to your communication online (and in person!). Harassment, intimidation, or discrimination in any form will not be tolerated.
- We ask that you do not photograph, video, or audio record information during scientific sessions (talks and posters). Special arrangements to photograph or record sessions, WITH EXPLICIT PERMISSION FROM
PRESENTERS and ESA, can be made through the associate director of conventions and meetings (meetings@esa.org), but must be pursued well in advance of the event! [PHOTOGRAPHY AT SOCIAL EVENTS, IN PUBLIC AREAS, AND AT PLENARY SESSIONS IS OKAY.]

- There are options for sharing presentation materials without in-session photography: Presenters may post slides and posters to ESA’s GoLightly community, described above, for public or members-only access. Presentations can also be shared on, Figshare, Github, and other online databases at any time.

- Social/new media (Twitter, Facebook and others) “opt-out” policy: While the default assumption is to allow open discussion of ESA presentations on social/new media, please respect any request by a presenter to not disseminate the contents of their talk. The icon linked to below may be downloaded from the ESA website for inclusion on slides or posters to clearly express when a presenter does not want their results posted to Twitter or any other new media sites.

You may download an opt-out Twitter image https://esa.org/neworleans/social-media-guidelines/. (PLEASE INCLUDE THE OPT-OUT TWITTER IMAGE ON EVERY SLIDE TO ENSURE YOUR PREFERENCE IS KNOWN SINCE PEOPLE MAY COME IN AFTER YOUR PRESENTATION BEGINS.) Thank you in advance to everyone for following these basic guidelines for online posts of all kinds and helping us maintain a welcoming environment for sharing information.

As a reminder, the official meeting hashtag is #ESA2018. (The official annual meeting hashtag for future annual meetings will be #ESA and the year of each meeting.) We look forward to seeing your thoughts and discussion online.

ESA sections and chapters are encouraged to make use of ESA’ social media, which includes Twitter (@esa_org), a blog, Facebook, Google+, Instagram, LinkedIn, and more. Sections and chapters might consider tweeting about news and opportunities. Several have created Facebook pages, which ESA also features on its FB page and section and chapter chairs or other members might also consider submitting a guest post to ESAs blog. Please note that communications related to policy should first be discussed with ESA.

Blog

ESAs blog EcoTone showcases ecology and ecologists, focusing on ecological science in the news and its use in policy and education. EcoTone welcomes guest submissions on topics of interest to the broad ecological community. Please see: http://www.esa.org/esablog/

Twitter

ESA uses Twitter daily to tweet items of interest to the ecological community, including news articles, members who have received a prestigious award or to announce deadlines to submit abstracts to the annual meeting. Sections might tweet about news relevant to their community or special opportunities and awards offered by their section.

Sections can use ESA’s twitter handle: @esa_org. ESA’s Twitter page is https://twitter.com/I/ESA_org. The official Annual Meeting hashtag is #ESA and the year of each meeting.

Please refer to the Social Media Guidelines at https://esa.org/neworleans/social-media-guidelines/

Facebook

Facebook (FB) is another outlet for sharing ecological and ESA-related information and encouraging conversation among ESA members and others. Sections and chapters that create their own FB page should notify ESA so that the Society can “like” them on FB and ensure they are featured on the Society’s FB. Sections and chapters are also encouraged to “like” ESA on their respective FB page. Please go to: http://www.facebook.com/esa.org

LinkedIn

ESA maintains a LinkedIn profile page that is the world’s largest professionals networking site used to build a professional identity and access new opportunities in ecology and environmental science. Sections are encouraged to build a unique section page and connect with the ESA main page.

ESAs LinkedIn page can be accessed by this link: https://www.linkedin.com/groups?home=&trk=anet_ug_hm&gid=1233137

Instagram

ESA maintains an Instagram account. Sections and chapters are encouraged to develop their own Instagram account and connect with the main ESA Instagram page.
ESA’s Instagram can be accessed by this link: https://www.instagram.com/ecologicalsociety/

Google+

ESA maintains a Google+ page. Sections and chapters are encouraged to develop their own Google+ page and connect with the main ESA Google+ page.

ESAs Google+ page can be accessed by this link: https://plus.google.com/111172871196171730512/posts

<table>
<thead>
<tr>
<th>PUBLIC AFFAIRS</th>
</tr>
</thead>
<tbody>
<tr>
<td>POLICY</td>
</tr>
<tr>
<td>Sections and chapters may be interested in becoming involved in policy issues or activities. They must inform the Society about their plans so that ESA is aware of activities that count as lobbying (for IRS purposes) and also to ensure that activities are consistent with the Society’s perspective on a given issue. ESA occasionally encourages its members (often by state or section) to weigh in on a public policy issue. For more details, question or suggestions about ESA advocacy and policy positions, please contact Alison Mize, director of public affairs, at <a href="mailto:alison@esa.org">alison@esa.org</a></td>
</tr>
</tbody>
</table>

| ADVOCACY |
| As a 501(c) (3) organization, ESA is permitted to lobby but must abide by the Internal Revenue Service’s (IRS) rules in order to maintain ESA’s tax-free status. Sections and chapters planning a lobbying activity should coordinate with ESA’s Public Affairs Office. |

| ESA POLICY RESOURCES/OPPORTUNITIES |
| ESA policy handbook, “An Ecologist’s Guidebook to Policy Engagement” provides advice and resources for engaging with decision makers at various levels of government. It also includes overviews of environmental laws, federal agencies, and tips on effective communication. It is available in the members-only website. |
| ESA Policy News is a free resource for those interested in national environmental and science policy, and it is sent to all members. To view and subscribe see: http://www.esa.org/esa/public-affairs/esa-policy/policy-news-2 |
| ESA’s Policy Section provides networking opportunities for ESA members engaged in or interested in becoming engaged in policy. Contact Sarah Anderson, sarah.m.anderson.10@gmail.com. |
| ESA Graduate Student Policy Award is open to all ESA graduate students and provides a two-day policy experience in Washington, DC. For more information visit the webpage, ESA Graduate Student Policy Award. |
PART B (WORDPRESS WEBSITE MANUAL)

ESA MAIN WEBSITE

ESA builds its main website on WordPress, which is an open source content management system (CMS). “Open source” is defined as “pertaining to or denoting software whose source code is available free of charge to the public to use, copy, modify, sublicense, or distribute.” A CMS is defined as “a computer program that allows publishing, editing, and modifying content as well as maintenance from a central interface. Such systems of content management provide procedures to manage workflow in a collaborative environment.” The main ESA website strives to create a coherent web presence, streamlined process of updating content and allows for stakeholder participation. WordPress is used to maximize efficiency in the use of staff resources.

In adopting WordPress, ESA has established guidelines for common design elements in an effort to bring continuity to the various ESA websites. These common design elements include basic page layout, color scheme, and logo placement. We believe adherence to these protocols enhances ESA’s brand recognition and facilitates page navigation for users of our websites. This document is intended to provide an introduction to WordPress and an overview of how to use it to manage website content.

CHAPTER AND SECTION WEBSITES

Many ESA chapters and sections have their own websites. It is the responsibility of the Chair to see that the website is updated. Most section/chapter Chairs select an administrator to update their site. Sites are hosted at esa.org. Chapter/section members are responsible for updating and maintaining their own web content, although the ESA Webmaster is available to assist them with resolving technical issues, adding functionality, and problem solving.

Although ESA has adopted WordPress as its CMS of choice for all new websites hosted at esa.org, not all chapters and sections are online yet with the ESA CMS. If your chapter/section does not use WordPress, the ESA Webmaster will not update the content on your chapter/section website. If your chapter/section does not yet have a website, or if your website is not hosted at ESA, the ESA Webmaster can help your chapter/section establish a WordPress account and set up a website in WordPress. Web-related inquiries can be sent to the ESA Webmaster at (webmaster@esa.org).

ESA offers all chapters/sections the opportunity to use WordPress to support their websites and to host their websites at esa.org. We believe broader use of WordPress offers several advantages, both to the chapters/sections and to ESA:

- Using the CMS gives chapter/section members greater autonomy in managing their website content as it frees them from having to rely on the ESA Webmaster to make updates. Chapter/section members managing their own content also allows for greater efficiency in the application of limited ESA staff resources.
- Following format guidelines when using the CMS also leads to increased coherence among ESA websites. The more webpages have a similar look, the more they reinforce the ESA brand.
- Because the CMS offers a robust tool that supports not only editing of content, but also maintenance of content from a central interface, using it allows chapters/sections to integrate documents and create a repository for images, news, profiles, and other media in one place.

Section and chapter websites and community pages use small computer programs that extend the functionality of the site. These include:

- Audio/video
- Calendaring systems
- Document collaboration
- Forms
- Forums
- Members-only content
- Member profiles
- Photo/video galleries
- Queries/polls
- Social media integration
- Voting
- Analytics
ESA MASTER TEMPLATE AND INDIVIDUAL WEBSITE CUSTOMIZATION

A master template has been developed that predefines the style for our ESA website. Our predefined style sets guidelines for text and background colors as well as page layout, including page width, heading/page/footer width and positioning, and text styling (for regular text, links, and headings). With individual websites some customization is also allowed. However, please refer to the guidelines summarized below.

TEXT AND BACKGROUND COLORS

<table>
<thead>
<tr>
<th>Name</th>
<th>RGB</th>
<th>Hexadecimal</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teal</td>
<td>RGB(0,99,96)</td>
<td>#016360</td>
<td>Headings</td>
</tr>
<tr>
<td>Light Teal</td>
<td>RGB(0,153,147)</td>
<td>#009993</td>
<td>Headings</td>
</tr>
<tr>
<td>Blue</td>
<td>RGB(0,83,158)</td>
<td>#00539E</td>
<td>Highlights</td>
</tr>
<tr>
<td>Green</td>
<td>RGB(0,144,0)</td>
<td>#009000</td>
<td>Highlights</td>
</tr>
<tr>
<td>Orange</td>
<td>RGB(255,166,0)</td>
<td>#FCA600</td>
<td>Highlights</td>
</tr>
</tbody>
</table>

Text should appear in black on a white background to create a good contrast for reading.

<table>
<thead>
<tr>
<th>Element</th>
<th>Size</th>
<th>Color (hexadecimal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>12px</td>
<td>Black (#000)</td>
</tr>
<tr>
<td>H1</td>
<td>36px, Bold</td>
<td>Light black</td>
</tr>
<tr>
<td>H2</td>
<td>18px, Bold</td>
<td>Dark Teal (#006360)</td>
</tr>
<tr>
<td>H3</td>
<td>14px, Small-Caps</td>
<td>Light Teal (#03bbb7)</td>
</tr>
<tr>
<td>Viewport</td>
<td>100%</td>
<td>Width=device-width</td>
</tr>
<tr>
<td>Page</td>
<td>1000px Wide</td>
<td>White (#fff)</td>
</tr>
</tbody>
</table>
ESA defines the elements of a basic page as follows:

**Template areas**
- A. Site background
- B. Header
- C. Page
- D. Footer

**Page parts**
- 1. Masthead (banner)
- 2. Logo
- 3. Menu
- 4. Page heading (title)
- 5. Sub heading (title)
- 6. Page text
CHAPTER AND SECTION WEBSITE CUSTOMIZATION

Section/Chapter logos are a unique, distinct way of branding sub-organizations within the Society. However, so that they clearly communicate their relationship to and extension of the ESA brand as it pertains by region, specialty or affinity group, they should always comport with ESA’s brand guidelines (below), and should be developed in consultation with ESA. If a section is planning to use their own logo on their website, social media sites, or other promotional items, they are required to consult with ESA before displaying it. For more information, contact Jonathan Miller. ([jon@esa.org](mailto:jon@esa.org)). Elements that chapters/sections should maintain include background, header, and basic font styling, as well as the width and height of pages. Chapter/section members may choose their own banner/logo and customize the page layout within the ESA Master Template constraints. ESA recommends moderation in the use of different font styles.

A good rule of thumb is to choose only 2 different fonts when trying to emphasize content. It is also important to know that underlining on the internet indicates a hyperlink. Therefore do use an underline but instead use bold, italics or a different font size for emphasis.

Be consistent when considering your layout. Try not to incorporate too many different styles and colors into your design.

WORDPRESS USER MANAGEMENT

WordPress has a built-in system that limits which types of functions may be performed by individual users. Users are defined by their roles and each role designation corresponds to a set of tasks called capabilities that a user with that particular role designation has authority to perform. The default role for all users can be set in Administration Panels > Settings > General.

We recommend assigning the highest level role, administrator, to the chapter/section chair who would then control what other users can and cannot do within the site. Chairs would also manage other users’ access to such tasks as writing and editing posts, creating pages, defining links, and managing other users, by assigning a specific role to each user.

UNDERSTANDING ROLES AND CAPABILITIES

Within WordPress there are six pre-defined roles: Administrator, Editor, Author, Contributor, and Subscriber. Each role corresponds to a set of tasks called capabilities that one with that particular role designation has authority to perform. Although there are many specific capabilities WordPress supports (e.g. "publish_posts", "moderate_comments", and "edit_users"), the following summarizes the functionality associated with each role.

- **Administrator** – has access to all the administration features within a single site
- **Editor** – can publish and manage posts including the posts of other users
- **Author** – can publish and manage their own posts
- **Contributor** – can write and manage their own posts but cannot publish them
- **Subscriber** – can only manage their profile

The **Administrator** has authority to perform all possible tasks. Although no role should be considered to be senior to another, the range of tasks one has authority to perform narrows with each succeeding role on the list, allowing fewer and fewer tasks to be performed. For instance, a user designated with the **Subscriber** role has the authority only for "read" capability. Roles may be considered also to define users’ responsibilities within the site.

MANAGING THE USER PROFILE

The profile includes the username, passphrase, and email address. You should always keep it up to date. You also should periodically change your passphrase for security reasons. **It is important to use a secure passphrase, which meets the following criteria:**

- Include at least 11 characters
- Include both upper- and lowercase letters
- Include numbers
- Include special characters
- Do not use commonly used words
• Avoid words or names that can be guessed by someone who knows who you are. (Words related to your hobbies, religion, work, interests, sports, personal history, names of relatives, etc., are commonly used but very poor sources of passwords.)
• Avoid numbers or letters that are part of your email address.

Maintain the security of your account! Change your pre-assigned password the first time you log into WordPress.

ADDING NEW USERS

The Add New User screen allows you to add a new person who can login onto your site

ADD NEW USER

To add a new user, you must provide the following information.

• **Username (required)** - Enter the username of the new user. This will also serve as his/her Login name.
• **E-mail (required)** - Enter a valid e-mail address for the new user. The e-mail address must be unique for each user. If a published post or page is authored by this user, then when approved comments are made to that post or page, a notification e-mail will be sent to the author.
• **First Name** - Enter the first name of the new user.
• **Last Name** - Enter the last name of the new user (the display name defaults to first and last name).
• **Password (twice)** - Enter a password for the new user twice, once in each text box displayed.

**NOTE:** Strength Indicator – After the password is entered, a message will appear indicating whether the password entered is Very Weak, Weak, Medium, or Strong (displayed in green). The stronger the password, the more secure the login.

**HINT:** The password should be at least seven characters long. To make it stronger, include a combination of upper- and lowercase letters, numbers, and symbols (e.g. ! " ? $ % ^ &).

• **Send Password?** - Check the box to send the password to the new user by email.
• **Role** - Select the desired Role for this user from the drop-down box options displayed.
**WORKING WITH WORDPRESS**

This section contains a brief description of how to perform the most common tasks as you start to use WordPress. Additional information can be found at [http://www.wordpress.org](http://www.wordpress.org) and [http://codex.wordpress.org/Administration_Screens](http://codex.wordpress.org/Administration_Screens). The ESA Webmaster also is available to assist you with site related inquiries.

**LOGGING IN TO WORDPRESS**

To get started:

- Go to www.esa.org/sitename*/wp-admin.
- Enter your *username* and *password*.
- Click on the *Log In* button.

* Sitename here is the name of your site, which is assigned by ESA.

If you do not remember your password:

- Click on the *Lost your password?* button under the login box.
- When asked, enter the email address associated with your user account, or your username.
- Click on the *Get New Password* button.
- Follow the instructions in an email containing a link to reset your password that will be sent to you.

**CREATING PAGES**
To create a new page, log into your WordPress account. Select **Administration** > **Pages** > **Add New** to access the **Add New Page** screen shown below and begin creating a new page.

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**TITLE EACH PAGE**

You should start every page by giving it a title. You may use commas, apostrophes, quotation marks, hyphens/dashes, or other symbols in the page title (e.g. "About My Site - Here's Lookin' at You, Kid"). WordPress will reformat the title and create a link to the page from the title.

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**PAGE EDITING AREA**

Enter text, links, links to images, and any other information you want to display in this area. You can use either the **Visual** or the **HTML View** to compose your pages.

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**PREVIEW BUTTON**

Click on the **Preview** button to review the page before publishing it.

---

**PUBLISH BOX**

This box contains buttons that determine access to your page. The options are **Published**, **Pending Review**, and **Draft**. **Published** means the page has been published on your website for all to see. **Pending Review** means a draft of the page is available for review by those with Editor’s permissions prior to publication. **Draft** means the page has not been published and will be saved as a draft. Select one of these options from the dropdown menu to publish the page with the corresponding level of access.

---

**VISIBILITY**

This feature determines who can see your page. **Public** pages will be visible by all website visitors. **Password protected** pages may only be seen if the password is known. **Private** pages are only visible to those with Editor or Administrator authority.
SAVE

This feature allows you to save your page as a draft/pending review, rather than immediately publishing it. To return to a draft later, select Pages > Edit from the menu bar and select your page from the list.

PERMALINK

After you save your page, a permalink is automatically created and appears below the title, generating a URL for the page. The URL generated may reformat your title, replacing most punctuation and blank spaces with a dash. For example, if your title is "My Site - Here's Lookin' at You, Kid", it will be changed to "my-site-heres-lookin-at-you-kid" in the URL. You can also manually change the URL to one that you prefer.

PUBLISH

This feature allows you to publish your page to the site. You can edit the time when the page will be published by clicking the Edit link above the Publish button and entering the time you want the page to be published. By default, when you first save your page, that will be the date and time your page goes live.
USING WORDPRESS MENUS

This section covers the basic tasks a user may carry out when using the built-in WordPress menu editor.

DEFINING A MENU

You must define a menu before you can add items to it. To do so:

- Login to the WordPress dashboard.
- From the Appearance menu on the left-hand side of the Dashboard, select the Menus option to bring up the Menu Editor.
- Enter a name for your new menu in the Menu Name box.
- Click on the Create Menu button.

ADDING ITEMS TO A MENU

The Screen Options allow you to select items you add to a menu. Certain items, like Posts are hidden by default.

- Locate the panel titled ‘Pages’
- Within this panel, select the View All link to bring up a list of all the pages on your site.
- Select the pages that you want to add to the menu by clicking the checkbox next to each page’s title.
- Click on the Add to Menu button located at the bottom of this window to add those page(s) to the menu.
- Scroll back to the Menu Editor.
- Click on the Save Menu button.
DELETING A MENU ITEM

To delete a menu item, navigate to menus under Appearance.

- Locate the menu item you want to remove in the menu editor window.
- Click on the arrow icon in the top right-hand corner of the menu item/box to expand a menu item.
- Click on the Remove Link button. The menu item/box will be immediately removed.
- Click on the Save Menu button to save your changes.

CUSTOMIZING MENU ITEMS

The Navigation Label This field specifies the title of the item on your custom menu. This is what visitors will see when they visit your site. The Title Attribute This field specifies the Alternative ('Alt') text for the menu item. This text will be displayed when a user's mouse hovers over a menu item.

- Click on the arrow in the top right-hand corner of the menu item to expand it.
- Enter the values that you want to assign for the Navigation Label and Title Attribute items.
- Click the Save Menu button to save your changes.

CREATING MULTI-LEVEL MENUS

When planning the structure of your menu, you should think of each menu item as a heading in your formal document. The main section headings (Level 1 headings) are far left on the page; sub-section headings (Level 2 headings) are indented slightly to the right; any other subordinate headings (Level 3, 4, etc) are indented even further to the right.

The WordPress menu editor allows you to create multi-level menus using a 'drag and drop' interface. You can drag your menu items up or down to change the order of appearance in the menu. Drag menu items left or right to create a sub-level.

To make one menu item a subordinate to another, you need to position the 'child' underneath its 'parent' and then drag it slightly to the right.

- Position the mouse over the 'child' menu item.
- While holding the left mouse button, drag it to the right.
- Release the mouse button.
- Repeat these steps for each sub-menu item.
- Click on the Save Menu button in the Menu Editor to save your changes.

WORDPRESS PLUGINS

Plugins are 3rd party software packages that can extend WordPress’ functionality. There are literally thousands of WordPress plugins available, both free and requiring payment of additional fees.

Before using a specific plugin to add functionality to your website, contact the ESA Webmaster. Many plugins can cause disruption on the entire ESA site or cause some elements to not function properly. Often plugins are the main cause of site instability and pose a serious site security threat.

A site that has been hacked can suffer from loss of content, stolen data, and expensive downtime. Maintaining the security of your site helps provide visitors with the best service possible. Because WordPress is such a popular platform
for blogging, it is a regular target for hacking attacks launched by people who find and exploit weaknesses and vulnerabilities in websites. You can increase the security of both your site and the ESA website by being attentive to the items listed below.

**SITE SECURITY**

1. **Basic Precautions**
   - Report all suspicious activity to the ESA Webmaster.
   - Contact the ESA Webmaster if you discover issues with plugins, the site in general, etc.
   - Inform the ESA Webmaster of all current administrators of your site.
   - If you suspect a breach, notify the ESA Webmaster immediately.
   - Deactivate all unused plugins.

2. **User-Based Protections**
   - Create user accounts only for people who will have responsibility for editing your site.
   - Do not create unnecessary administrative accounts.
   - Do not create accounts for outsiders.
   - Delete all inactive accounts.
   - Monitor all accounts.

3. **Password/Username Protection**
   - Make sure all users use strong passwords.
   - Change passwords regularly.
   - Remind all account holders to change their passwords at least twice a year.

**COPYRIGHT AND LEGAL ISSUES**

All chapters/sections are responsible for the content on their website. Remember:

- Do not use images or any other content you find from common internet search engines (Google, Bing, etc.), unless you can verify the copyright holder and obtain their written permission to use that content.
- Only post images that you are legally allowed to use on your website.
- Include copyright information when you use content that you have not created.
- If you use comments, review these regularly and delete inappropriate content.
- Do not allow hateful or discriminatory content to be posted on your website.

**ADDITIONAL RESOURCES**

If you need help with your website, feel free to contact the ESA Information Systems Manager, Gordon Potter, by email at webmaster@esa.org, or by phone at 202 833 8773 (ext. 204).

The following sites also offer a wealth of information about WordPress.

- **WordPress Website** [http://wordpress.org/](http://wordpress.org/)
- **WordPress Documentation** [http://codex.wordpress.org](http://codex.wordpress.org)
PART C (BRAND IDENTITY STYLE GUIDE)

ECOLOGICAL SOCIETY OF AMERICA BRANDING

The Ecological Society of America (ESA) logo, logotype, colors and typographic style are key components of an Integrated, transmedia branding program which communicates our image to all of our audiences.

How we visually communicate our brand has an immediate and lasting effect upon how our audiences perceive our organization. Perception of our brand begins with the consistent and quality application of all elements—from subtle to highly visible.

VISUAL VOICE

Our branding identity elements support and reinforce a consistent visual voice across all media. This style guide is intended to establish the practices for correct application of our brand identity elements.

GUIDELINES

This document provides guidelines to assist the ESA’s employees and partners in creating communications and marketing materials that are consistent with regard to all elements of our branding.

INFORMATION

Please contact Steve Sayre, Director of Publishing and Member Services, at steve@esa.org or 202-833-8773 x212 if you have questions regarding this style guide and its use.

IDENTITY ELEMENTS AND THEIR MEANING

A logo tells a visual story which is distilled and then compressed into a unit. ESA branding is a result of years of visual audit and analysis, brand recognition and tradition. The evolution of the final product centered around the challenge of maintaining existing brand recognition, incorporating the concept of clean lines and simplicity which enhances the organization’s presence on the national stage.

With the use of a contemporary yet timeless font, combined with letterforms crafted to emulate the original logo, the ultimate result is a unifying identity which is identifiable, memorable, distinctive, sustainable and flexible.

The ESA brand is a strong visual reminder of the organization’s accomplishments and promise. It also signals the organization’s intention to be relevant in today’s ever-changing technological climate, extending that acknowledgement to the audience it serves, and yet be cognizant of the strong tradition that is the hallmark of its existence.

ECOLOGICAL SOCIETY OF AMERICA LOGO

The ESA logo consists of custom-treated typographic letterforms supported and surrounded by strong bars of color and the organization name as shown below. Under no circumstances should the logo be redrawn, modified or altered in any way.
Alternative treatments of the logo may only be used as specified in this style guide. The logo does not lend itself to separation or use of any component on its own and should be kept intact, except in the specific instances outlined in this guide.

Reproduction of the logo should be completed using the approved electronic versions of the art available from the Communications Department. Do not attempt to reproduce the logo from photocopies or low-resolution jpg or png files taken from the organization’s website.

**ECOLOGICAL SOCIETY OF AMERICA**

**USE OF COLOR**

The ESA logo is distinctive and its composition should not be altered in any fashion, except for when a white or black version is required.

The color table below identifies the logo color for various applications.

The cmyk, rgb and hex versions colors are NOT exact equivalents. They will render a slightly different color representation of the logo in print (CMYK) and online (RGB/hex). In order for the logo to be represented accurately, the PMS color should be used wherever possible in print materials.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PMS</td>
<td>7721C</td>
<td></td>
</tr>
<tr>
<td>CMYK</td>
<td>(89%, 0%, 43%, 65%)</td>
<td></td>
</tr>
<tr>
<td>RGBA</td>
<td>(0, 94, 93, 1)</td>
<td></td>
</tr>
<tr>
<td>HEX</td>
<td>#005E5D</td>
<td></td>
</tr>
</tbody>
</table>

Please see “Colors” below for the approved secondary color palette which is suggested for complementary use with the color logo.

**MINIMUM SIZE**

The ESA logo should not appear smaller than shown in the demonstration below without prior approval from the Communications Department. The minimum size of 1” will ensure that the logo is legible in all forms of reproduction.
MINIMUM CLEARSPACE

Always maintain the minimum amount of clearspace around the logo as demonstrated below. This will ensure that the logo is always properly staged and visible.

A minimum distance of $X = \text{the distance of the negative space inside the “a” of “esa”}$ should be maintained around the logo.

ACCEPTABLE USE FOR ISOLATED LETTERFORMS

It is understood that in certain instances it may be desirable to use the letterform portion of the ESA logo in isolation, in order to add subtle interest to materials which are not particularly stylized.

To that end, it is acceptable to use the letterform as a stand-alone piece of art—provided it is used minimally—to add visual interest and enhance the layout or design of materials. If screened, a low (5, 10 or 20%) opacity is recommended. The larger the accent, the lower the opacity.
The ESA primary and secondary color palettes were carefully chosen to allow for maximum creative freedom whilst maintaining the integrity of the organization’s visual identity and brand recognition. It is therefore important that the use of color in all materials be somewhat constrained to ensure consistency.

The primary palette has been specified above. The secondary color palette below may be considered when approaching new creative.

### Secondary Color Palette

<table>
<thead>
<tr>
<th>RGB</th>
<th>RGB</th>
<th>RGB</th>
<th>RGB</th>
</tr>
</thead>
<tbody>
<tr>
<td>9-54-107</td>
<td>9-107-53</td>
<td>255-21-78</td>
<td>220-53-34</td>
</tr>
<tr>
<td>32-244-247</td>
<td>22-168-171</td>
<td>94-43-12</td>
<td>4-117-111</td>
</tr>
<tr>
<td>10-87-117</td>
<td>171-65-0</td>
<td>5-69-145</td>
<td>167-163-126</td>
</tr>
<tr>
<td>107-25-82</td>
<td>145-123-5</td>
<td>104-146-196</td>
<td>84-86-90</td>
</tr>
</tbody>
</table>

### Ecological Society of America Color Typography

Typography plays a major role in shaping a brand. To help create a consistent identity for all printed and electronic materials generated by ESA, a standard family of typefaces has been chosen for use in all media (marketing materials, communications, business forms, signage, website, etc.).

The Avenir family was chosen for its contemporary appearance, even stroke width and high degree of legibility in print and electronic media. This also complements the more traditional letterforms in the logo.

For web and other applications where Avenir is not an option, Google’s Nunito font may be substituted. The sentence length is a good match and the x-height is close. The ascenders and descenders are a slightly shorter, but workable.

Examples of just a couple of styles within each family are given below.

**Avenir LT Std**

Aa BbCc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu Vv Ww Xx Yy Zz

Aa BbCc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu Vv Ww Xx Yy Zz

**Nunito**

Aa BbCc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu Vv Ww Xx Yy Zz

Aa BbCc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu Vv Ww Xx Yy Zz