

CALIFORNIA OCEAN SCIENCE TRUST STRATEGIC DIRECTION DECEMBER 2017

CONTEXT

The California Ocean Science Trust (OST) is a non-profit organization whose mission is to advance a constructive role for science in decision-making by promoting collaboration and mutual understanding among scientists, citizens, managers, and policymakers working toward sustained, healthy, and productive coastal and ocean ecosystems. A unique asset to the State of California, OST was established under the California Ocean Resources Stewardship Act (CORSA) of 2000. Recent work has focused on the challenges of a changing climate, including ocean acidification, fisheries reform, and sea level rise, as well as regional baseline monitoring programs, which are now moving into the long-term monitoring phase.

OST has experienced transitional times over the last few years, and is currently in its second executive director search since 2015. The OST Board of Trustees has engaged an interim executive director and an executive search firm to support the current transition process.

During the first few months of this executive transition, in order to better prepare for a long term permanent executive director, the board and interim executive director did intensive strategic work to assess OST's funding model and staff capacity, refine the organization's strategic direction, and prioritize the qualifications needed in a permanent executive director.

The following Strategic Direction statement is the result of these conversations and summarizes OST's short-term strategy as the organization moves through and beyond the executive transition period.

STRATEGIC DIRECTION

*The California Ocean Science Trust (OST) is a **small and nimble** organization. Our business model prioritizes state partnerships as essential to our **value proposition** and as a means to secure **funding** (both directly from the state and leveraged from private sources).*

OST's **value proposition** is directly tied to its establishment through the California Ocean Resources Stewardship Act (CORSA) and depends upon creating a special relationship with state partners. Our relationship with the California Ocean Protection Council and other state partners is an essential part of our value for non-state partners; thus, state partnerships are at the heart of OST's work. CORSA does not entitle us to our special relationship with the state, but it makes it possible for us to continue to earn it.

Some of the ways that OST adds value for our state partners include:

- Scientific Independence. We are skilled at convening scientists and synthesizing scientific research to produce balanced, independent scientific products and advice that are responsive to state needs.
- Agility (staffing). We have agile capacity relative to the state. With sufficient communication and planning, we can optimize our capacity to be ideally responsive to state needs.
- Agility (organizational). We are not bound by the same regulations as a state agency. (For example, OST can bring on teams of contractors for a particular project more quickly than the state.)
- Relationships. As a nonprofit, OST can be a bridge between the state and other stakeholders, including the academic community, the fishing industry, tribal governments, and more.
- Funding. We can leverage funding from other sources (federal agencies, private foundations, corporations, individuals) and have successfully done so throughout our history.

Small and nimble means that OST will cultivate an agile organizational model that prioritizes partnerships and teamwork, both internally and externally.

- OST will maintain a smaller core staff than in the recent past. We will implement systems of capacity planning to anticipate workflow, and respond to peak periods by bringing in skilled contractors, fellows, or other partners strategically.
- Scientific credentials remain essential for staff, but deep academic specialization will be less important than the abilities to bring together effective teams, distill scientific knowledge, and navigate the processes that link science to policy and management.
- Our goal is to build a reputation where OST can be counted on to create outstanding work and positive relationships with any partner.

Funding comes primarily from state contracts for now, with the understanding that state relationships provide the basis by which OST can continue to leverage additional non-state funding. In other words, since state relationships are at the core of our value proposition, we will place a high priority on continuing our state funding partnerships.

- State funding from the Ocean Protection Council has undergone some changes this year that will affect OST's business model, including the end of a multi-year grant and the readiness of the Department of Fish and Wildlife to take leadership of the MPA Monitoring Program designed and launched by OST. Future state funding will be on more of a project by project basis.
 - Notwithstanding these changes, the Ocean Protection Council will remain at the core of OST's relationships. OST anticipates receiving continued funding from the Ocean Protection Council (and other state partners) as a result of the exceptional value that OST brings to the state.
 - This does not mean that the Ocean Protection Council must be OST's only or even primary funder. Rather, it means we acknowledge that OST's value is largely derived from its special relationship with the state.

- OST currently has some funding partnerships with other state agencies beyond the Ocean Protection Council, and we will continue to develop these. But we must acknowledge that payment mechanisms directly from other agencies to OST are not yet well established.
- Additional private foundation and corporate funding is leveraged out of our unique relationship with the state. OST has historically matched most state funding through private sources, and will seek to maintain and grow these sources of funding. This can only be done successfully if we are starting from a strong place with our state partners.
- Private individual funding may eventually become part of the mix, but is not a priority for OST's funding model at this time.