

# Final Ocean Strategic Framework Evaluation Report

July 23, 2020



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# Acronyms List

ACLD	Asia Capacity and Leadership Development	INGO	International Non-Governmental Organization	SPREP	Secretariat of the Pacific Regional Environment Programme
AIS	Automatic Identification Systems	IPCC	Intergovernmental Panel on Climate Change	SR	Supply chain roundtables
AP2HI	Pole & Line and Handline Fisheries Association	IPO	Initial Public Offering	TAC	Total Allowable Catch
BEKAL	Bersama Kelola Alam Adil Lestari	IUU	Illegal, Unreported, and Unregulated	TNC	The Nature Conservancy
BPP	Blue Pioneers Program	KII	Key Informant Interview	TOC	Theory of Change
BSC	Blue Swimming Crab	KKPRB	The Sustainable BSC Fisheries Management Committee	TURF	Territorial Use Rights for Fisheries
CEA	California Environmental Associates	LAC	Latin America and the Caribbean	UID	United in Diversity
CI	Conservation International	MEL	Monitoring, Evaluation, and Learning	UNIDO	United Nations Industrial Development Organization
CMFA	China Marine Funders Alliance	MMAF	Ministry of Maritime Affairs and Fisheries	USAID	United States Agency for International Development
COBI	Comunidad y Biodiversidad AC	MOU	Memorandum of Understanding	VMS	Vessel Monitoring Systems
COBSEA	Coordinating Body of the Seas of East Asia	MPA	Marine Protected Area	WCS	Wildlife Conservation Society
CONANP	Comisión Nacional de Áreas Naturales Protegidas	MSC	Marine Stewardship Council	WFF	Walton Family Foundation
CONAPESCA	Comisión Nacional de Acuacultura y Pesca	NCEL	National Caucus of Environmental Legislators		
C&S	Conservation and Science	NGO	Non-Governmental Organization		
CSO	Civil Society Organization	NOAA	National Oceanic and Atmospheric Administration		
CTC	Coral Triangle Center	NOPC	National Ocean Policy Coalition		
DAN	Defensa Ambiental del Noroeste	NRDC	Natural Resources Defense Council		
DEI	Diversity, Equity, and Inclusion	OE	Organizational Effectiveness		
DG	Director General	OECD	Organization for Economic Co-operation and Development		
DLM	Data Limited Methods	OSCLA	Outer Continental Shelf Lands Act		
EBM	Ecosystems Based Management	OSF	Ocean Strategic Framework		
EBFM	Ecosystem-based Fisheries Management	PEMSEA	Partnerships in Environmental Management for the Seas of East Asia		
EDF	Environmental Defense Fund	PO	Program Officer		
EQ	Evaluation Question	PSMA	Ports States Measures Agreement		
ET	Evaluation Team	RAY	Roger Arliner Young		
FAD	Fish Aggregating Devices	RFMO	Regional Fishing Management Organizations		
FAO	Food and Agriculture Organization	SDGs	Sustainable Development Goals		
Foundation	the David and Lucile Packard Foundation	SECO	Swiss Economic Cooperation Office		
FIP	Fishery Improvement Project	SEMARNAT	Secretariat of Environment and Natural Resources		
FMI	Fishery Management Index	SFP	Sustainable Fisheries Partnership		
F&W	Fish and Wildlife	SGP	Small Grants Program		
GEF	Global Environment Finance	SI	Social Impact, Inc.		
GPS	Global Positioning System	SNAPP	Science for Nature and People Partnership		
GSM	Global Seafood Market				

# OSF Report Executive Summary: Introduction

From September 2019 to March 2020, Social Impact conducted an external evaluation of the Packard Foundation's Ocean Strategic Framework (OSF). The purpose of the evaluation was to inform the future design and implementation of the OSF, which is scheduled for a refresh in 2020-21, and to contribute learnings toward the refreshes of individual Strategies in 2021-22.

The OSF, adopted in 2016, builds on the Foundation's contributions to protect and restore the ocean. The strategy drives work with philanthropic organizations, civil society, the business sector and government partners to enhance the enabling conditions and policies for sound marine resource management in countries with globally significant marine biodiversity. The OSF sets the following three broad goals:

- **Sustainable Fisheries:** More than half of global seafood will come from countries and regions with sound fisheries management policies and regulations in place.
- **Sustainable Aquaculture:** More than half of seafood sourced from the most damaging forms of marine aquaculture will come from countries with responsible marine aquaculture management policies and regulations in place.
- **Marine Biodiversity:** Within the focal countries, regionally and globally recognized targets for marine biodiversity protection will be achieved or exceeded.

To achieve these outcomes, the OSF covers six focal countries (Chile, China, Indonesia, Mexico, Japan, and the United States) and four Global Strategies (Global Seafood Markets, Marine Birds, Illegal, Unregulated, and Unreported (IUU) Seafood, and Climate Change and Ocean Acidification)\*.

The evaluation focused on five primary evaluation questions, developed with the Oceans team:

- **EQ1: *Relevance*.** To what extent are the Country and Global Strategies' theories of change (TOC) still valid and relevant?
- **EQ2: *Integration*.** To what extent are the Foundation's Country and Global Ocean Strategies sufficiently integrated?
- **EQ3: *Effectiveness*.** To what extent has OSF achieved its objectives (e.g. promote market and supply chain incentives; improve scientific economic and policy knowledge; support policy, regulatory and enforcement reforms; and enhance leadership and capacity) nationally and globally? What has worked or not, and why or why not?
- **EQ4: *Equity*.** In what ways is OSF advancing (or not advancing) equity, particularly in program design and beneficiary impact?
- **EQ5: *Durability*.** What has been done in each strategy to promote durability of outcomes? What seems promising/likely to work (scale, replication, capacity building, leaders, institutions, networks, etc.)?

\* The OSF evaluation design, while covering a broad array of activities, focused data collection efforts in China and Indonesia due to time and resource constraints. This necessarily limited the amount of data collected for each of the other countries and strategies. The evaluation's findings should be interpreted accordingly.

# OSF Report Executive Summary: Methodology and Findings

The full report also details answers to specific sub-questions under each of these five main evaluation questions, some of which are specific to certain focus countries, and recommendations based on findings.

To answer these evaluation questions, the evaluation team used a mixed methods approach consisting of 116 Key Informant Interviews (KIIs), a desk review of the Foundation documents, data, and the scientific and technical literature, and in-person workshops in Jakarta and Los Altos to ground-truth emerging findings and recommendations with the Foundation staff, grantees, and partners. The OSF evaluation covered six focal countries and four global, cross-cutting strategies through five main evaluation questions and 29 sub-questions. Outside of deep-dive countries China and Indonesia, this necessarily limited the amount of data collection that could be conducted for each country and strategy. The evaluation's findings should be interpreted accordingly.

## FINDINGS

### EQ1 **EQ1: *Relevance*. To what extent are the Country and Global Strategies' theories of change (TOC) still valid and relevant?**

Though not explicitly stated in the OSF, the Evaluation Team (ET) identified four key hypotheses underpinning the OSF. These hypotheses were derived from review of the OSF Strategy Framework (2016) and the Oceans Strategy Options Paper (2015).

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resources degradation: commercial fishing, climate change, coastal and habitat destruction, and pollution.

**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

- Sound policies, regulations, and their application
- Decision making based on best available knowledge and information
- Market incentives for sustainable and responsible marine resources
- A citizenry aware of the dangers and opportunities
- Competent institutions and leadership across sectors

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with multiple and diverse, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

## OSF Report Executive Summary: Findings

The scientific evidence strongly support **Hypotheses 1 and 2**. Global fisheries and ecosystems are under increasing anthropogenic stresses related to climate change, overfishing, pollution and increasing utilization of the oceans in general. The effects of climate change have intensified and are resulting in the degradation of marine ecosystems and fisheries. Temperature and chemical disruptions in the waters are causing changes in the size of stocks and shifts to different geographies and habitats. Klls also point to climate change as a major concern. Meanwhile, overfishing remains a significant threat, further contributing to the gradual decline in global stocks. IUU also continues to be a major factor contributing to unsustainable fisheries. Finally, studies report that fishing, aquaculture, and marine biodiversity become particularly vulnerable under the combined effect of pollution, overfishing, and climate change.

All five of the conditions listed in **Hypothesis 3** are supported by examples from the literature (Olsson et al., 2010; Gelicich et al., 2010) and other evaluations (Ross Strategic et al.'s 2020 GSM Evaluation; CEA Consulting's 2020 Global FIP Review; UNIDO's 2020 fisheries value chain evaluation). Projects supported by the Foundation have demonstrated important gains for sustainable fisheries by addressing a combination of the above conditions. In addition to the five enabling conditions identified in the OSF, another condition prominent in other evaluations is access to financing is an enabling condition consistently addressed by Foundation grants but not referred to in the OSF TOC.

As stated in **Hypothesis 4**, the use of ocean resources is subject to complex interactions between ecological, economic and political factors, which require

the engagement of stakeholders operating at the local, national, regional and global levels. Key stakeholders engaged in the Foundation's work include fishers, industry actors across different supply chains, universities, NGOs, and governments. Governments are particularly important, because they have jurisdiction and the legal right to set and enforce rules over the management of ocean resources. NGOs and universities play a key role in the Foundation's work. It is through these organizations that the Foundation channels its support. The Foundation's engagement in policy and regulatory reform takes place mostly through their support to NGOs, Universities, and respected individuals. In addition, Foundation Program Officers (POs) often cultivate relations and have access to officers in various levels of government. Government capacity is a major factor in determining the accomplishments the Foundation is able to achieve. The most effective FIPs, for example, demonstrate goal alignment with the government and engage with other key stakeholders.

Multilaterals and bilaterals are important for similar reasons. The Foundation has engaged with multilaterals in the past including the World Bank report on Sunken Billions and an ongoing collaboration on the ProBlue initiative, USAID in Indonesia, and RFMOs through grants to MSC. There are also opportunities for the Foundation to explore engagement with regional inter-governmental organizations, such as PEMSEA in East Asia, that have a long history of working with governments and can help the foundation tackle transboundary concerns as well as challenges related to coastal zone management, pollution and litter, coastal fisheries, and MPAs. Another opportunity is the UNDP/GEF Small Grants Program, which may provide an avenue for grantmaking in countries that present onerous requirements for international NGOs or philanthropies to operate.

# OSF Report Executive Summary: Findings

## Risks of Unintended Consequences in the OSF

While the OSF is opening opportunities for sustainable management of marine resources, economic growth, and better income and living conditions for local populations, the strategy also carries some risks and possible unintended consequences. One such risk is the potential impact of harvest strategies that concentrate and manage one, or a few, closely-related species in the ecosystem. The Foundation's work addresses risks to local ecosystems through supporting studies to set sustainable catch limits, designation of no-take zones, promotion of bycatch reduction practices and technologies, etc. These are fully integrated in the Foundation's work on FIPs, tuna fisheries, Marine Birds, and MPAs. Other areas of work such as MSC certification and fishery ratings also support sound ecological fisheries management.

The expansion of global market chains into local economies also risks consolidation of wealth through supply chains, flow of capital away from rural areas, and the growth of inequalities among the local populations. For example, total allowable catch implementation can potentially push smaller fishers under the poverty line if mitigation measures do not ensure value is distributed across the supply chain – particularly among fishers and other labor groups.

The OSF also carries long-term risks. One pertains to the resilience of local communities due to exogenous market shocks, collapse of commodity prices triggered by COVID-19, monocrop diseases such as those affecting aquaculture, and trade disputes such as the trade war between the US and China. During the COVID-19 pandemic, the Foundation helped mobilize California's government

safety nets and approved funding to prevent the collapse of local fisher groups. Other Country Strategy teams have mobilized emergency resources to respond to similar disruptions. Nevertheless, one lesson from the COVID-19 experience is the need to explore more strategic approaches to risk mitigation such as the support of emergency funding and insurance schemes as well as – for some developing countries – the diversification of commodities and markets. Another long-term risk inherent to the current seafood market trends relates to projections indicating the exports of quality seafood to major international markets will result in long run (2030) nutritional deficiencies in fish-exporting countries in the Global South.

Several exogenous factors have also affected the Foundation's outcomes. Those enabling progress against OSF goals include the introduction of government policies supporting sustainable ocean management such as the new fisheries law in Japan, the emphasis on blue economy in China, and growing public awareness of ocean issues across all OSF focal countries. Hampering effects have included administration policy changes in the US, Mexico, and Indonesia which give lower priority to environment concerns and has resulted in rollbacks of resources and regulations in some cases. Other hampering factors include the increase in climate-related events in project sites, widespread social unrest in Chile triggered by an increase in the price of metro tickets and leading to backlash against environmental initiatives, and disruption in seafood market changes and work programs due to COVID-19.



# OSF Report Executive Summary: Findings

## Ocean Programming Consistency with the OSF

Grants and other support provided by the Foundation fall well within the boundaries established by the OSF and different Country and Global strategies. While a systematic review of grant data against the theory of change was not possible given the structure of the grant database, the ET's review of grant reports and summaries, analysis of MEL data, and KIIIs did not identify any grants that fell outside the scope of these strategies or the OSF. Relatively few grants include aquaculture, which the Foundation approaches as a long-term issue.

Two important contributing factors to the Foundation's achievements are not sufficiently acknowledged in the OSF. The first is the Foundation's non-grant support to grantees in the form of strategic advice, information sharing and networking. A second is the Foundation's existing work in financing, including engagements with other philanthropies, multilaterals, and institutional capacity-building and awareness-raising to attract financing to ocean issues.

The OSF, global, and country TOCs incorporate lessons and perspectives derived from previous Foundation activities. In the US, Mexico, and Indonesia, Strategies formalized an emphasis on fisheries management work, drawing on many of its partners and capacities from earlier work in biodiversity and ecosystem resilience. In China, the Foundation's strategy was based on lessons learned from its earlier work there on climate change, including engaging the scientific community in China and linking scientists and universities between the US and China.

## Key takeaways:

- The OSF Theory of Change remains highly relevant and useful for guiding work towards the Foundation's long-term objectives. The OSF provides clear vision, values, and objectives, and identifies priority areas of work. At the same time, the OSF allows flexibility for country and cross-cutting strategies to work towards interventions and goals specific to their individual conditions. The OSF and its main hypothesis are also supported by current science.
- Growing scientific evidence indicates climate change is becoming a major disruptor of marine ecosystems that will require novel approaches and institution. Scientific studies also indicate that good fisheries management and good MPA management are important for a robust climate resilience of marine ecosystems.
- The Foundation's work properly integrates risk mitigation measures to ensure fishing does not harm the ecosystems. Other risks inherent to the OSF that related to unintended consequences to local societies are not considered: these include the risks of intensification of inequalities, risks of market shocks or the risks that current market trends are contributing to future nutritional deficiencies in seafood exporting countries in the global south.
- Climate change is likely to magnify transboundary concerns in oceans management. Multilateral organizations offer an opportunity for partnerships to address these emerging treats.

# OSF Report Executive Summary: Findings

EQ2

## **EQ2: *Integration.* To what extent are the Foundation's Country and Global Ocean Strategies sufficiently integrated?**

The evaluation team (ET) considers integration as high-reward when it has resulted in outcomes that are better, and of a different quality, than those outcomes that could be achieved by teams working alone. This evaluation examines integrations in terms of:

- OSF development and global/country strategy refreshes
- Collaboration across strategies
- Communication and facilitation across teams

There was a high payoff from the investment in coordination during OSF development and strategy refreshes. This was achieved through a flexible process that set OSF-wide objectives to guide work carried out by the various teams.

The Global and Country Strategies are also well integrated. The Country strategies have applied principles and guidance provided by Global Strategies to their specific contexts and opportunities. The work carried out by the Global and Country Strategies is complementary with no significant duplication, likely a result of coordination in strategy development. A Science-based approach is mainstreamed throughout Country Strategies, but climate change-focused work is part of the Foundation's work the US, Mexico, and Indonesia.

Integration with OE and ACLD have also been high-reward, producing qualitatively different results (such as improved grantee strategic planning, more robust financial sustainability and increased communication and collaboration among grantees) from the support provided by the OSF strategy teams.

The primary trade-off of integration is the demand on staff time. Consequently, higher-level coordination (such as aligning strategies) has had higher payoffs vis-à-vis cost than ongoing down-stream coordination (such as joint grant-making). However, specific, high-value issues which require joint capacities of more than one strategy—such as the collaboration between the Science Program and GSM Strategy on data limited methods or the joint work between the Indonesia and GSM Strategies on developing and testing fishery archetypes in Indonesia—are also areas where investment in coordination has the potential to offer value beyond the specific teams engage, and thus be high-reward.

An opportunity to further enhance integration will be in development and finalization of the IUU and Climate Change and Adaptation (CC&A) Strategies. Defining these strategies could enable a more cohesive, consistent approach to integrating these global issues across the other Global and Country Strategies. Given the growing evidence of the effects of climate change, further guidance on this topic is urgent.

Other important forms of integration are taking place beyond the internal structure of the OSF and the Foundation. Non-grant resources have supported grantee integration through workshops, network building, and coalitions, as well as donor coordination to align efforts in the same countries. The Foundation's voice has been an important part of integrating work between donors and the Foundation's participation in initiatives attracts both attention and funding to its causes. While this has paid off in more coordinated, effective work, donor coordination also requires a heavy investment of Foundation staff time.

# OSF Report Executive Summary: Findings

## Key takeaways:

- Theories of change for the OSF and Country and Global Strategies are consistent and aligned.
- The OSF has pursued integration in three ways: the development of the OSF and global/country strategy refreshes, collaboration across strategies, and facilitation of communication across strategy teams. These efforts have resulted in consistent vision, outcome areas, key enabling conditions across OSF, Country and Global Strategies.
- While a science-focused approach is mainstreamed across all Country Strategies, climate change is not.
- Integration with grantees and other donors is well-managed. Continued integration of this type and quality will require continued heavy investment of Foundation staff time.

**EQ3** **EQ3: *Effectiveness*. To what extent has OSF achieved its objectives (e.g. promote market and supply chain incentives; improve scientific economic and policy knowledge; support policy, regulatory and enforcement reforms; and enhance leadership and capacity) nationally and globally? What has worked or not, and why or why not?**

**(Note: the Foundation’s GSM evaluation will discuss the effectiveness of markets and supply chains.)**

The Foundation’s approach to steering oceans management into a sustainable path has required simultaneous and integrated work pertaining to different enabling conditions. For example, the Foundation’s investments in scientific, economic, and policy knowledge have primarily targeted fishery data and management tools for use in developing regulations that would lead to better management of natural resources. Work related to different enabling conditions tends to be mutually reinforcing. For example, strategies that target changes in policy and regulatory reforms (such as to Marine Protected Areas (MPAs) or catch limits) required both the provision of scientific studies to reframe or provide evidence for management decisions, and capacity development in government and scientific institutions to better use the tools and data. Once established, the regulations provide guidelines for mainstreaming science in the management of MPAs or specific fisheries. Examples include the SNAPPER initiative and regulations pertaining blue swimming crab in Indonesia. Often, successful government engagement included using science to demonstrate the economic validity of a proposed policy, investing substantial staff time in cultivating key government relationships, and building specific data or policy analysis skills among government officials.

The Foundation has made important contributions to leadership and capacity development in all focal countries. Investments in capacity are also supported by the Foundation’s commitment to its grantees, which often includes long-term partnerships and core funding—necessary inputs to stability for organizational growth. In addition, Foundation staff typically mentor grantees and build their links with networks that provide further opportunities for capacity development

## OSF Report Executive Summary: Findings

and coordination. Foundation contributions to capacity development are typically focused on either a champion-building approach, where exceptional individuals are supported to build organizations in environments where CSO capacity is low, as in China, Indonesia, and Japan, or a wider organizational development and cohort strengthening approach where capacities are more developed, as in the USA and Mexico. One example is the Federal Response programming in the USA and the Pescadero program in Mexico where the Foundation supported campaign coordination and unifying voices to affect policy. In Indonesia, the Foundation has sought to promote joint grant making among international and domestic NGOs, collaborations with OE to apply lessons from the Pescadero program, and other leadership development initiatives.

While it was not possible for the ET to attribute some transformational policy or supply-chain changes to the Foundation, evidence from KIIs and grantee reports indicate that the Foundation's contributions have been essential. For example, it would be unlikely that the progress made in sustainable seafood markets would have been achieved in the absence of support provided by the Foundation and its philanthropic partners. This includes the ongoing support to FIPs as well as the establishment of mechanisms for industry engagement and broader support services such as MSC certification. In Mexico many KIIs reported that the Foundation's support has been key to developing the robust capacities of organizational and institutional capacities pertaining to coastal and marine issues in North West Mexico. Given that much of the Foundation's country level work takes place close to the water, much of the contributions have been related to regulations or standards for specific fisheries, creation of MPAs, or support in the formulation of management plans. Some exceptions include the contributions to the new fisheries law in Japan, the Federal response in the USA and contributions to shrimp regulation in Mexico.

The ET also found that non-grant resources enhanced effectiveness of the Foundation's programming by helping grantees refine strategies and broaden networks, driving coordination among donors to make grants more efficient and targeted, and using the Foundation's voice to draw attention to specific regions and issues, thereby drawing more resources and effort to achieving related objectives.

However, given the information available, in many cases the ET could not determine the extent of the contribution or the specific differences the Foundation's support made. For example, while CEA 2020 reports that many FIPs have contributed to regulations, CEA also identifies governance and government capacities as an important factor affecting the progress of initiatives. The scope of the work carried out by CEA and the information available did not allow for an analysis of how frequently these contributions take place, what other factors (beyond the Foundation's work) are at play that enable or hamper accomplishments. Many of the Foundation's contributions seem to be taking place through NGOs or universities as opposed direct coordination with government agencies. While NGO- or university-led initiatives can help efficiency in generating short term outcomes, this approach might not always be contributing sufficiently to the capacity and ownership within key government agencies to ensure durability. The application of the law also remains a major barrier to policy reforms leading to change.

While it is important to approach targets as directional and flexible, learning has been key for the Foundation's transformation of complex systems. The most effective approaches applied by the Foundation have been:

- Integrated approaches working at multiple levels
- Long-term flexible grants that allowed grantees to build capacity, retain qualified staff, and make long-term commitments
- Use of scientific evidence to support policy reforms
- Capacity building approaches and integration with OE

# OSF Report Executive Summary: Findings

Progress towards the three high-level OSF Targets has been slow, though according to the Foundation, the OSF and other global strategy targets were directional and aspirational. This approach is appropriate given the complexity of the challenges tackled, gaps in knowledge and the unpredictability and non-linearity of ocean systems.

**Fishery management:** The high-level outcome for fisheries is to have over fifty percent of global seafood sourced from countries with sound fisheries management policies. CEA calculates that 38% of seafood production comes under some sustainable management regime. It is not clear to what extent this amount of seafood production is linked to the Foundation's support. Similarly, despite IUU-related international agreements and legal and regulatory advances, it continues to be a major problem.

**Biodiversity protection:** The OSF aims for regionally and globally recognized targets for marine biodiversity protection in the focal countries to be achieved or exceeded by 2030. Using country commitments to MPAs as an indicator, progress in biodiversity protection in the Foundation's focal countries has been slow. As this was a long-term objective, increases were expected to be slow. Concerning, however, is the fact that budgets for the management of established MPAs is largely nonexistent or insufficient.

**Aquaculture:** As indicated in EQ1, Foundation support to aquaculture has not kept up with investments related to fisheries or MPAs. This is consistent with OSF intention to expand support to aquaculture according to relevance to focal countries, staff capacities, and opportunities for large-scale change.

## Key takeaways:

- Foundation focal countries have made progress in securing industry commitments toward sustainability, through the extent this has led to improvements on the water is not always clear. The team lacked sufficient information to determine the extent to which improvement is a result of Foundation support.
- The work carried out by all Strategies is advancing scientific and economic knowledge, policy and regulatory reforms, and building organizational and leadership. This is often done in mutually reinforcing ways. Application and enforcement of the law and regulations remains a major challenge.
- While progress toward the three major OSF global goals—sustainable fishing, aquaculture, and biodiversity protection—has nonetheless been slow, the Foundation has approached high level goals flexibly. Goals have been useful tools to provide direction to Foundation's Country and Global Strategy work and to derive lessons across its portfolio.
- There are many indications that the Foundation work has contributed to the enabling conditions for transformation towards sustainable ocean management. There are also reports that the Foundation's support has contributed to enhanced organizational capacities and science-informed policy and management outcomes. Nevertheless, information gaps prevented the ET from assessing extent to which Foundation initiatives contribute to changes, how other factors that have contributed or hampered accomplishments.

# OSF Report Executive Summary: Findings

## EQ4 **EQ4: Equity. In what ways is OSF advancing (or not advancing) equity, particularly in program design and beneficiary impact?**

In line with current trends in philanthropy (e.g. Olivarez, 2019), the Foundation has begun to articulate how diversity, equity, and inclusion (DEI) relate to its work. Interviews with Ocean Team staff revealed support for these considerations. However, grantees' most common response to questions about equity during fieldwork was that they had not yet explicitly incorporated equity into their work with the Foundation, though they were interested in better understanding the Foundation's approach to equity. The US Marine Strategy has made the most progress in incorporating DEI into grantmaking through specific human-centered indicators and outcomes, and DEI-conscious grants.

Some grantees promote procedural equity—equity in who participates in decision-making—through engaging underrepresented groups in program design or hiring them as staff. Grantees who work directly with fishers believe that their activities are promoting fishers' livelihoods and empowerment through providing them training, access to government services, and forums through which to understand and discuss environmental programs. Grantees provide positive examples of grassroots consultations and understanding of grassroots power dynamics, which they incorporate into program design. Such consultations, according to external research, improve outcomes. Nonetheless, many grantees have not yet thought about how to include equity in their work and would value the Foundation's guidance. Given the low sample of fishers in the KIs, the evaluation cannot present a representative perspective of the fishers. There are not monitoring, evaluation, and learning (MEL) data to systematically measure possible benefits to fishers or community members.

Another important aspect of equity pertains to unintended consequences and the distribution of the benefits and the risk entailed by the initiatives the Foundation supports (see EQ1.0/1.2). Three considerations in this respect are: 1) The extent to which the intervention includes strategies to ensure distribution of benefits and mitigate risks of growing inequality among the affected populations (including special attention to gender); 2) The extent to which initiatives seek to mitigate risk of unintended consequences related to the articulation of local economies to global markets through one or few commodities; 3) The risk that the trends of the global seafood trade which is supplying quality seafood to the international market (mostly for the US and Europe) also run a risk in the long run (2030) of resulting in nutritional deficiencies in the fish-exporting countries in the Global South. Power is a key factor that underlies the social distribution of costs, benefits and risks. These factors are largely missing in the Foundation's strategies and risk unintended consequences that exasperate inequalities, make livelihoods more vulnerable and undermine food security in fish exporting countries.

The Foundation's approach of building local NGO capacity and new leaders promotes the capabilities, access, and power of those with less voice, though the approach also carries a risk of choosing winners only among those who already have access. The Foundation's moves toward increasing diversity of grantees, particularly in the US, Mexico, and Indonesia, are steps in the right direction, though concentration of grantee capacity remains more of a risk in Japan, where the Foundation has focused on work with prominent organizations that have access within the existing government power structure, and China, where regulations on international organizations necessitate a model of working with re-granter foundations that take a more top-down approach to grantee interaction.

# OSF Report Executive Summary: Findings

## Key takeaways:

- The Foundation is in the process of shaping its approach to equity, as equity is not fully considered in strategy documents, communication with grantees, or outcome measurement systems. Aspects relevant to a Foundation strategy on equity include equity consideration of interactions with grantees, the social distribution of benefits generated by Foundation grants and Foundation-supported market chains, and the risk of unintended consequences stemming from the Foundation's strategies.
- The extent to which the Foundation grants benefit local communities is difficult to assess because the Foundation does not keep systematic data on outcomes for communities. Nonetheless, circumstantial evidence indicated that Foundation grants are resulting in benefits to local communities. Many of the national and local grantees work closely with local communities and incorporate social benefits to their programs. Yet, communities are not explicitly incorporated as stakeholders with a voice in Foundation grants. Similarly the Foundation should distinguish between the different stakeholders involved in the activities it supports (considering factors such as gender and the position of stakeholders in the market chain).

## EQ5: *Durability*. What has been done in each strategy to promote durability of outcomes? What seems promising/likely to work (scale, replication, capacity building, leaders, institutions, networks, etc.)? EQ5

The Foundation's goal is to bring about global transformations in sustainable use of resources that can support all forms of life that depend on the oceans. In so doing, the Foundation seeks to address root causes that, in the long run, will bring about the desired changes. In this context, durability of results becomes a crucial aspect of its strategy.

Four main approaches under different strategies have proven promising to promote durability:

- Integrated approaches addressing multiple enabling conditions reinforces outcomes through ensuring that stakeholders at different levels are engaged and working on a common agenda.
- Building capacity and alliances helps ensure durability of grant results.
- Awareness raising and information dissemination that builds support by the public and consumers can positively pressure markets and policy makers.
- Long-term support to and flexibility with grantees promotes an enduring civil society acting on OSF priorities which reinforces durable outcomes in both capacity building and policy.

The major risks to durability of the results of the Foundation's work are related to policy variations and staff turnover during administration changes, financial resources to support expansion and scaling of results (including agency budgets and financing diversity among grantees), competition among actors (redundant or contradictory projects as well as competing interests among stakeholders), and climate-related impacts that disrupt supply chains, local societies, stocks, and ecosystems.

# OSF Report Executive Summary: Findings

Scaling for this evaluation is defined as “expanding, adapting and sustaining successful interventions (policies, processes, programs or projects) in different places and over time to reach a greater number of people,” and is closely related to durability. Three mechanisms commonly used for scaling and to enhance durability of development initiatives are: mainstreaming initiatives into law, policies, or programs; replicating initiatives under similar scales and conditions; or scaling-up over larger geographic area which frequently requires engagement with a broader and more complex set of issues and type of stakeholders (GEF 2012). Several OSF strategies include aspects of scaling. For example, the GSM strategy adopted a comprehensive approach to scaling that includes approaches such as model FIPs as tools to demonstrate approaches that can be mainstreamed through policies and regulatory reforms and guidelines, as well as models for industry engagement that can be replicated across market chains. The Indonesia Strategy similarly develops archetype fisheries with the objective to mainstream, replicate, and scale up approaches applicable to different types of fisheries.

While integrating some key aspects for scaling, most country and global strategies have not adopted a systematic and explicit approach to enhance of durability and scaling. Evaluation literature indicates that approaches incorporating scaling strategies early on the process, that regularly update strategies, and that use strategies to adapt to changing conditions are most effective.

Key components to consider in the strategy are:

- Demonstration and communication of the benefits of the model or innovation,
- Identification of changes, and their timing, that need to take place,
- Identification of the levels at which changes need to take place (i.e. local, national, global),
- Identification and commitment from stakeholders that must be engaged at different stages and levels,
- Identification of the necessary financial and technical resources needed, and
- Monitoring of progress and contextual factors that might require adjustments to the strategy.

**Key takeaways:**

- Durability and scaling are closely related and are best approached with strategies that integrate these two objectives. While the OSF teams have incorporated approaches and mechanisms that seek to enhance durability and scaling results, the extent to which this has been done in a systematic way varies from Strategy to Strategy and among individual initiatives. A more systematic tactic that gives attention to durability and scaling from the start, that develops a strategy that can help navigate, monitor, and adapt to changing conditions, could significantly enhance progress towards the OSF goals.



# OSF Report Executive Summary: Recommendations

**Recommendation 1:** *The Foundation should adopt a more comprehensive approach to issues related to DEI.*

The Foundation should incorporate measures of human and social outcomes in grants and Strategies wherever applicable to better incentivize and measure distribution of benefits or detriments. This will allow the Foundation to better understand where its work is or is not producing positive and negative equity results (EQ 4.0) and adjust accordingly. The Foundation should also, in consultation with grantees, develop DEI guidelines for its work. In developing the Foundation's approach to DEI, consider the extent to which community and underrepresented groups should be consulted and/or engaged in planning and design of strategy and different types of grants. DEI guidance should also address risks inherent to Foundation strategies. This will allow the Foundation to set a standard practice and targets for such inclusion, as well as to expand its awareness of how its work intersects with contextual equity (EQ 4.0).

*Confidence Level: Medium*

**Recommendation 2:** *The Foundation should regularly assess the OSF's potential for unintended, short-term and long-term risks to local and marginalized populations and explicitly consider how to mitigate these risks.*

Integration with global markets offers valuable opportunities for populations to better their livelihoods and grow their local economies. However, these ties can carry heightened vulnerability to unintended consequences stemming from market shocks, distribution of wealth, as well as other unintended consequences. In some instances, the Foundation promotes local specialization in one or a few related commodities that presents risks to the resilience of local communities. Long-term market trends may also result in nutritional deficiencies in tropical, seafood-exporting countries.

One method to address such risks is helping local communities to diversify their market and commodities to link to domestic and regional markets. (EQ 1.6).

*Confidence Level: Medium*

**Recommendation 3:** *The OSF team should develop a strategy that guides the Foundation's contributions to the evidence base, methods, capacities, and institutions to manage and adapt fisheries, biodiversity conservation, and aquaculture to climate change and ocean acidification.*

We are only beginning to understand the extent to which climate change affects widespread change in the oceans, but the existing knowledge base is sufficient to start planning for it. The ET recommends the Ocean team explicitly strategize for, and support capacities around, addressing climate change and ocean acidification. Evidence indicates that sound fisheries management and management of MPAs are key to their climate resilience. There is also evidence that fish stocks are responding to changes in temperature and chemical composition of the water by changing size and migrating to different geographies. These factors are likely to impact areas of the Foundation's work, require changes in regulations (e.g. around minimal size policies), and affect current fisheries administration schemes. Shifts in stocks are likely to result in country-specific impacts while also requiring the involvement of robust transboundary institutions. (EQ 1.0, 1.2).

*Confidence Level: Medium*

# OSF Report Executive Summary: Recommendations

**Recommendation 4:** *The Foundation should explore opportunities to catalyze a broader global approach to GSM transformation, with an expanded focus on Asia and consolidation of progress in North America, Europe, and Japan.*

The OSF evaluation team concurs with the GSM Evaluation recommendations presented on page 85 (Ross Strategic et al. 2020:85), particularly that “While the Foundation’s GSM strategies have enabled substantial progress on the journey to sustainable seafood market transformation to date, they have been insufficient to achieve the foundations’ goals thus far. Additionally, continuing with the current approach potentially could drive transformation of the supply chains serving North America, EU, and possibly Japan, but that would be insufficient to achieve transformation of global seafood markets overall. Accelerated ‘shifts’ in strategic focus for the GSM movement are needed to get out of the trajectory of making incremental progress toward market transformation.”

*Confidence Level: Medium*

**Recommendation 5:** *The Foundation should more intentionally plan for durability and scalability in its intervention strategies.*

To ensure the Foundation’s project results are durable, Ocean teams should consider integrating more explicit pathways and strategies for the scalability and durability of results from inception. These strategies should continue demonstrating the relevance and benefits of models or innovations, but also clearly delineate how the scaling is expected to take place. To ensure the durability of results in the context of climate change building capacities to address transboundary maritime concerns. One way is to explore the feasibility of collaboration with organizations that have developed lasting partnerships with multiple governments such as PEMSEA or the UNDP-GEF Small Grants Program (EQ 5.0, 1.0, 1.2).

*Confidence Level: High*

**Recommendation 6:** *Given the Ocean teams’ increasingly complex work, limited staff resources, and low level of Foundational priority in aquaculture, the Ocean teams should reassess OSF-wide engagement and targets around aquaculture.*

The Foundation recognizes advances in sustainable aquaculture will be important to meeting the global demand for seafood, to reduce pressure on capture fisheries, and to prevent practices that are harmful to wild species and habitats. According to program teams, an Ocean-wide focus on aquaculture is planned once improvements are realized in fisheries work. Yet, emerging, confounding factors affecting fisheries are increasing the complexity of the Foundation’s existing programming. These increase the workload of the Ocean program’s lean staff whose bandwidths are already strained. The Foundation should assess where its work on aquaculture is likely to have the highest impact (likely China) and focus aquaculture activities only in those geographies rather than rolling it out more broadly. The opportunity cost of engaging in aquaculture more generally could impact the Foundation’s ability to respond to other needs, including capacities and governance frameworks in Global South (particularly Asia) sustainable fisheries and seafood markets; increasing attention to human rights and DEI issues in global fisheries, and mitigating emergent risks of global market integration to local societies and economies.

*Confidence Level: Medium*

# OSF Report Executive Summary: Recommendations

**Recommendation 7:** Staff workloads and resources should factor into decisions surrounding integration, collaboration, and implementation.

In the last five years, integration has taken place in the Ocean teams in three general ways: OSF development and Global/Country Strategy refreshes, collaboration across strategies, and communication and facilitation across teams. Each has implied tradeoffs in terms of the benefits derived and staff time invested. The ET recommends that the Foundation place emphasis on completing the Strategies that are in development. This, coupled with monthly meetings and the help of the OSF Director, could ensure that the work of Strategy teams remain consistent and complementary. Opportunities for additional formal collaboration among teams (or collaboration with other programs) should take into consideration existing work and funding limitations. One criterion could be the extent to which collaborative work can substitute existing work already carried out by the team. For example, in the case of leadership capacity development, if the results of working with OE are deemed of higher quality and lower burden for staff than their current capacity-development activities, the former should substitute the latter (EQ 2.1).

The Foundation should consider the staff composition and resources dedicated to the China Strategy, as work in this country has progressed rapidly and is now approaching the levels of engagement of a fully fleshed out Country Strategy. Given that China is the highest producer and consumer of seafood in the world, this country is critical to the objectives of OSF.  
*Confidence Level: Medium*

**Recommendation 8:** The Foundation should make more explicit the role of financial conditions in the achievement of the long-term goals of the OSF. While the OSF does not explicitly include financing among its key enabling conditions, in practice, support to financial conditions takes place in many different forms across the teams' work. Including finances as a key enabling condition in the OSF or Theory of Change would better map and communicate the Foundation's existing work (including non-grant support). It would similarly call further attention to a key factor hampering the achievement of conservation objectives, and under conditions where enabling factors are not in place to for the deployment of market instruments, or where they otherwise have limited applicability (EQ 1.3).

*Confidence Level: Medium*

**Recommendation 9:** The Ocean teams should further prioritize efforts to foster integration and complementarity among grantees. One of the Foundation's major challenges is ensuring that grants to widely diverse organizations can contribute to a common set of objectives. One method is through the development of Country and Global Strategies and by using these Strategies to guide the development of the of grant portfolios, which several Strategy Teams are doing. Work that fosters grantee integration such as the Pescadero Program has helped build relationships among cohorts of leaders and has contributed grantee collaboration (EQ 2.1, 3.1). As indicated in Recommendation 7, the OSF Team should consider substituting collaborative work with further OE engagement.

*Confidence Level: High*

# OSF Report Executive Summary: Recommendations

**Recommendation 10:** *As the Foundation engages with more diverse stakeholders and fosters complementarity among its existing grantees, Ocean teams should prepare to assume a more proactive role in facilitating collaboration among grantees.*

As the Foundation adopts strategic approaches that require joint planning and implementation by different grantees, POs will need to engage with grantees to identify and consider the trade-offs of collaboration, including potential tensions that can disrupt collaborative work (EQ 2.3). In China, the Foundation needs to work closely with re-granters to build re-granter capacity for mentoring and working collaboratively with grantees. This is an opportunity to make re-granter and grantee relationships more productive and to share some of the Foundation's best practices (EQ 3.8). The team recognizes there are time and resource implications, but believes the payoff to be worth that investment.

*Confidence Level: High*

**Recommendation 11:** *Strengthening the MEL Systems.*

The process of conducting this evaluation highlighted several recommendations regarding the use of MEL systems. Attention to these areas could support enhanced evidence-based decision making moving forward, particularly if they are done at the outset of grant and strategy work. Some specific measures include:

- Categorize indicators and grants against the OSF outcomes and approaches to be able to better measure and analyze progress against the Theory of Change.
- Integrate grantee-level progress indicators into the database to better enable reporting on grant contributions toward change.
- Define identify stakeholders in local society and communities and track the benefits and risks or unintended consequences derived from Foundation support.
- Articulate Theory of Change assumptions to better enable evaluation of their validity in the future.

*Confidence Level: High*

## Focal Country Executive Summaries: China

**EQ2.4** (China) *Is the China Strategy sufficiently integrated/coordinated with non-philanthropic donors/funders?*

**EQ3.6** (China) *Where and how are CSOs listened to and used by different levels of government?*

**EQ3.7** (China) *What mechanisms are CSOs using to engage with government and influence policy?*

**EQ3.8** (China) *What are CSOs' objectives and how do they align (or not) with Packard objectives?*

**EQ3.9** (China) *What kinds of non-grant support have been most important to supporting grantees?*

The Foundation is successfully building CSO capacity in China, both responding to a lack of Chinese NGOs in the marine space and increasing opportunity for their technical engagement with local and provincial governments. Respondents noted that government respects highly professional CSOs, particularly when they can provide high-quality scientific approaches and data on issue areas that are in line with government priorities. However, a difficult political environment allows limited space for INGOs with this sort of capacity to engage. The Foundation's approach to building local champions, institutionalizing the capacities of exceptional individuals, and encouraging the growth of, and collaboration within, the national CSO community, is likely to further the Foundation's goals. Both government and other CSOs/NGOs referred to China Blue as a model organization for this approach. Respondents noted that local and provincial governments are more responsive to NGO assistance than national governments are, and that they sometimes lack models and capacity to respond to central directives. Beyond CSO/government engagement, the Foundation is also supporting initiatives to establish ties between CSOs and the scientific community, though some grantees noted that industry also has a strong relationship to government and tripartite engagement between government, industry, and civil society helps to ensure policies are feasible and actors have necessary buy-in for implementation.

The Foundation's grantees reported priorities that align with Foundation objectives, including a focus on fishery reform, conservation, capacity-building and aquaculture. Grantees spoke appreciatively of the Foundation's open attitude, including flexibility in scope and operations, long-duration grants guided by non-static outcomes, transparent communication and two-way feedback cycles, as well as its capacity-building support for administrative and executive functions.

In the donor space, respondents noted some tensions with the Foundation's re-granting partners, expressing displeasure at a more top-down approach to the funder-grantee relationship, high overhead costs, little operational flexibility, less of an emphasis on capacity-building and less professionalism. Philanthropic culture is at an early stage in China and some KIIIs pointed to an opportunity for the Foundation to help build domestic philanthropic capacity. The Foundation is well-regarded by other funders in China (or by those who are assessing options to expand engagement in China) and its participation in collaboratives such as the China Marine Funder's Alliance (CMFA) lends credibility to these initiatives and helps to catalyze involvement from other donors. The CMFA has become an important source of information exchange in a challenging environment, but there are opportunities for further integration and engagement with non-philanthropic actors such as the UNDP-GEF's Small Grants Program.

# Focal Country Executive Summaries: Indonesia

**EQ1.6** To what extent is the model we've put in place sound? (i.e. Is it effective? Have you put in place enabling conditions?)

**EQ3.4** To what extent has our investment built or strengthened capacity?

**EQ3.5** To what extent has our technical assistance to ministry staff affected policy? What have been the enablers and barriers?

**EQ4.1** Who within these communities have benefited and how? Where have our efforts potentially spurred inequity?

**EQ4.2** To what extent are we adequately listening to local partners? Are they interested and engaged with our strategy?

*The ET interviewed stakeholders in Jakarta, Bali, and Lampung. While this included a cross-section of a variety of approaches from the Indonesia portfolio, the fieldwork data collection related to the Indonesia Strategy's Blue Swimming Crab (BSC) interventions in Lampung was relatively more in-depth than that of other interventions. Consequently, this section pulls many examples from the Foundation's BSC work in particular.*

The Indonesia Marine Strategy's (IMS) work in policy, capacity building, and archetype fisheries - snapper and mixed-species fisheries at the national level and blue swimming crab (BSC) at the provincial level – demonstrate successes against the Strategy's three main pillars: Provide Evidence of Good Fisheries Management, Inform Fisheries Management Policy Reform, and Capacity and Leadership Development for Improved Management. However, some elements of the model, including coalitions to advocate with government and scaling up of the models, have not yet been fully tested.

At the national level, technical assistance to the ministry has led to some reforms, including provision of high-quality stock data leading to the inclusion of snapper as one of MMAF's six national priority species. The Foundation has seen success engaging directly with government stakeholders to understand their priorities and pursue relationships that are a prerequisite for further engagement on policy. These have included training government officials on IUU issues and the use of economic and stock data analysis for management decisions. While initiatives continue to be hampered by high rates of turnover at all levels of government and a lack of coordination between high-level offices and stakeholders, the Foundation's flexibility to respond to emerging needs enabled them to demonstrate value and take advantage of emerging opportunities for

engagement. Beyond technical assistance at different levels of Indonesia's government, the Strategy's work in enabling local CSO advocacy was noted as a key input to long-term policy change.

At the provincial level, tripartite engagements involving industry, government, and community partnerships in Lampung have enabled implementation of fisheries management best practices and have led to policy changes including the introduction of a government-approved Sustainable BSC Fisheries Management Committee and a provincial BSC Zoning Plan. The Committee is a multi-stakeholder engagement among Foundation grantees, fisheries, middlemen, industry, and MMAF. It has supported the implementation of management plans where the provincial government lacks both budget and fisheries management capacities, and strengthened fisher representatives' knowledge of best practices and their ability to manage and disseminate best practices to fishing groups.

Capacity building and coordination activities in IMS have taken place at local, provincial, and national scales and have included grant support, such as United in Diversity's BEKAL program, OE grants, and provision of core funding, as well as non-grant support such as grantee meeting coordination, development of joint workplans between local and international organizations, network building, and coordinating support among funders. Though time intensive, these efforts have increased local capacity for sustainable fisheries management and present a good starting point for local organizations to take on leadership roles. However, grantee capacity remains mixed, as INGOs are seen as possessing higher

## Focal Country Executive Summaries: Indonesia (Cont.)

**EQ1.6** To what extent is the model we've put in place sound? (i.e. Is it effective? Have you put in place enabling conditions?)

**EQ3.4** To what extent has our investment built or strengthened capacity?

**EQ3.5** To what extent has our technical assistance to ministry staff affected policy? What have been the enablers and barriers?

**EQ4.1** Who within these communities have benefited and how? Where have our efforts potentially spurred inequity?

**EQ4.2** To what extent are we adequately listening to local partners? Are they interested and engaged with our strategy?

*The ET interviewed stakeholders in Jakarta, Bali, and Lampung. While this included a cross-section of a variety of approaches from the Indonesia portfolio, the fieldwork data collection related to the Indonesia Strategy's Blue Swimming Crab (BSC) interventions in Lampung was relatively more in-depth than that of other interventions. Consequently, this section pulls many examples from the Foundation's BSC work in particular.*

Barriers remain to establishing and implementing models for sustainable fisheries management. The government at all levels lacks capacity to apply fishing regulations, particularly to near-shore fisheries. Grantees find government capacity and relationship-building difficult due to high amounts of turnover and bureaucracy. Government stakeholders are worried that sustainable fishing policies will have negative economic impacts on fishermen. The IMS is working to change these perceptions through a science-led capacity building approach with government stakeholders, as well as elevating awareness of ocean issues through communications grants and capacity-building with CSOs that can help communities advocate for their right to a sustainable future. The Foundation's work with industry in FIPs has also advanced adherence to sustainable management best practices, though the ET's firsthand access to industry respondents was limited.

On equity, the ET found IMS staff are moving toward more local engagement in program activities, though the effects of the Foundation's programming on fisher's short-term economic status and livelihoods is not known due to lack of related MEL data and limited access to community respondents. The Strategy's archetype focus on one or a few species could increase vulnerability of local societies and economies to global market downturns.

In terms of local versus international ownership of program activities, most of the Strategy's funding goes toward large INGOs, though the Foundation plans to substantially increase the percentage of funds going to local NGOs over the coming years. Large INGOs tend to have long-standing relationships with the Foundation and these organizations are better equipped to respond to grant solicitations. That stated, local partners continue to need resources for capacity building, and government prefers working with local NGOs because it sees local organizations as a more sustainable mode for development. Local partners are deeply engaged in the Strategy's work and efforts to coordinate their messages and workstreams are building the sector's capacity toward local ownership, long-term policy and sustainable management objectives – though government respondents felt local NGOs still required more capacity-building support.

## Focal Country Executive Summaries: Japan

- EQ3.10** What have been Packard's most effective techniques to affect and respond to domestic policy changes? (how we pull organizations together, how we orient them, etc.)
- EQ3.11** What have been the most effective forms of non-monetary assistance to our grantees and what other types of assistance (non-grants) would be valuable in the future?

*As the Japan Marine Strategy's significant, market-driven components are largely extensions of the GSM Strategy, these evaluation findings are based on a small amount of information and the ET largely defers to findings from Ross Strategic's 2020 GSM Evaluation and CEA's 2020 Global FIP Review, which will provide more robust findings relevant to this strategy.*

The Japan Marine Strategy (JMS) has built momentum around fisheries policy change and engaging important stakeholders in government and civil society. The Foundation's grantees' work in awareness-raising with government officials, provision of science-based information, and capacity-building with civil society actors were contributing elements to Japan's signing of the Agreement on Port State Measures to Prevent, Deter, and Eliminate IUU Fishing and the passage of a historic fisheries reform bill in 2018 that included expanded the use of stock assessments, increased the use of Total Allowable Catch (TAC) quotas, required recovery plans for overfished stocks, among other provisions.

The Foundation's work with the IUU NGO Coalition, joint work-planning, and capacity-building grantmaking has helped grantees align their activities to their strategic advantages, become more networked, and coordinate their messages when engaging with government. However, as the NGO sector professionalizes, key informants cautioned that existing talent could easily become concentrated in leading organizations and noted that NGOs in Japan widely need ongoing organizational development support. Coordination with funder collectives such as Oceans 5 and Sustainable Seafood Funders Group, as well as with individual philanthropies like the Walton Family Foundation (WFF), has led to efficiencies such as co-funding, complementary funding of different grantee activities, and cooperatively maintaining grantee coalitions. Respondents warned that as more donors enter Japan, further coordination to find common goals and to minimize project overlap will be crucial.



# Focal Country Executive Summaries: United States

*EQ2.7 Is the US Strategy sufficiently integrated/coordinated with the IUU, Climate and Science Strategies?*

The US Marine Strategy (USM) is well integrated with climate change initiatives, the Science sub-program, and the IUU program. For example, funded through the IUU strategy, USM tracks progress in the 2016 US Seafood Traceability Rule. Climate work is explicitly incorporated into USM activities, and USM supports work protecting communities from offshore oil and gas drilling and advocating for continued protected area designations. The Science sub-program and the US Marine strategies are explicitly integrated, with co-funding to support US West Coast fisheries and habitat management in California and Oregon.

Changes in the US administration have resulted in less CSO access to national policymakers, budgetary cuts for environmental programming, and environmental policy and regulatory rollbacks. The Foundation has responded to changes in federal administrations by adopting “Federal Response” programming that strategically targets resources to defend the role of science and evidence-based decision-making in government. The USM has been successful at using grantee coalitions to coordinate policy positions and messaging, building the leadership capacity of individual leaders and fishing communities to advocate for their communities. The US Marine Strategy has also incorporated human-centered outcomes and indicators related to diversity in its grantmaking, recognizing the need to explicitly acknowledge diverse groups and the value diversity adds.

# Focal Country Executive Summaries: Mexico

**EQ2.6** *Is the Mexico Strategy sufficiently integrated/coordinated with the IUU and Climate Strategies?*

**EQ3.12** *How effective have Packard's efforts been in addressing small-scale fisheries IUU?*

Although IUU is not explicitly part of the Mexico Marine Strategy, the Foundation recognizes IUU as a major challenge to achieving OSF goals. Grants underway target elements important to curbing IUU, including work on monitoring and database compilation used by the government to improve transparency and traceability. Fisheries management improvements are being advanced by Mexico grantees through capacity-building with small-scale fishers, CSO actors, and government stakeholders, improving development and enforcement of regulatory frameworks for coastal-marine resources, and helping to align advocacy positions among CSO actors.

The Mexico Strategy similarly does not explicitly address climate change, though related initiatives are integrated in its strategy; and climate issues were a priority area among respondents. Climate-related research initiatives with the Science sub-program include an assessment of mangrove carbon stocks and technical assistance to CONABIO to assess monitoring of mangrove cover throughout the country

The Pescadero capacity building program through OE was noted as particularly successful for helping grantees on management, governance, strategy, and fundraising capabilities. It also was successful in promoting integration and cooperation among grantees. The Foundation has a long history of supporting CSO/government collaboration and working closely with the National Commission of Natural Protected Areas (CONANP) has been key for major conservation achievements in the Gulf of California. Fondo Mexicano, a historic Foundation partner, is often presented as a model of national environmental funds internationally.

The Mexico strategy also achieved successes related to biodiversity and supply chain sustainability. These include successful contributions to MPA management, application of sustainable practices piloted in the Gulf of California being applied to the Peninsula of Yucatan, and retailer commitments to sustainable seafood nearing their target.

# Focal Country Executive Summaries: Chile

## *EQ2.5 Is the Chile Strategy sufficiently integrated/coordinated with non-philanthropic donors/funders?*

The Chile Marine Strategy, included under the OSF in 2018, is the Framework's most recent addition. Evaluation of the strategy recognizes it has had comparatively less time to make progress towards OSF goals than other strategies.

Though the Chile Marine Strategy is closely coordinated with WFF and the Marisla Foundation, efforts to support an emerging funders collaborative and to engage with non-philanthropic funders are still at an early stage.

Successes in the Chile strategy since formation of the OSF include market-based outcomes related to territorial use rights for fisheries (TURFs) and kelp fisheries, work on fisheries' traceability, protection of coastal areas, coastal wetlands management planning, fisheries, and advancing MPAs with the Science strategy. Recently, grantee exchange workshops have raised grantees' awareness of the Foundation's country portfolio, and respondents noted they were useful for coordination. Achievement of goals supporting policy, regulation, and application of laws was slow, but showed incremental progress, including advancing MPAs, limiting expansion of the salmon industry into Patagonian fjords and protection of the Punta de Lobos.

Widespread social unrest in Chile, triggered by an increase in the price of metro tickets, have caused broader backlash against environmental initiatives, is a hampering exogenous factor to the Foundation's work there.

## Introduction

The Packard Foundation has contracted Social Impact, Inc. (SI) to conduct an evaluation of its Ocean Strategic Framework (OSF) across the Ocean Team's Focal Countries and Global Strategies. The purpose of this evaluation is to inform the future design and implementation of the OSF, which is scheduled for a refresh in 2020-21 and contribute learnings toward the refreshes of individual Strategies in 2021-22.

# The Ocean Strategic Framework

In March 2016, the David and Lucile Packard Foundation (the Foundation) adopted the Ocean Strategic Framework (OSF) to reinforce its longstanding commitment to marine conservation. The OSF was largely developed to guide the activities of its ocean-related Country and cross-cutting Global Strategies toward ambitious, shared, long-term outcomes. While the Foundation acknowledges that long term outcomes need to be flexible, the OSF adopted the following targets:

## SUSTAINABLE FISHERIES

More than half of global seafood will come from countries and regions with sound fisheries management policies and regulations in place.

## SUSTAINABLE AQUACULTURE

More than half of seafood sourced from the most damaging forms of marine aquaculture will come from countries with responsible marine aquaculture management policies and regulations in place.

## MARINE BIODIVERSITY

Within the focal countries, regionally and globally recognized targets for marine biodiversity protection will be achieved or exceeded.

## FOCAL COUNTRIES



Chile

China

Indonesia



Mexico

Japan

United States

## GLOBAL STRATEGIES



Global Seafood Markets (GSM)



Marine Birds



Illegal, Unreported, and Unregulated (IUU) Seafood



Climate Change and Ocean Acidification

# The Packard Foundation's MEL Principles and Priorities

## **Monitoring, Learning, and Adapting Principles**

The Foundation is guided by a longstanding commitment to reflection and continued learning in pursuit of a better future for children, families, communities, and the natural world. In 2018, the Foundation codified its approach to monitoring, evaluation, and learning (MEL) with a set of five guiding Principles and practices:

- Continuously Learn and Adapt
- Learn in Partnership
- Use a Variety of Information
- Cultivate Inquiry
- Share Learning to Increase Impact

## **Engagement with Grantees**

The Foundation engages with its grantees as partners in overall learning and adaptation. Grantees are considered key stakeholders with whom the Foundation shares lessons learned, and from whom they collect feedback. The Ocean Team places great value in direct engagement with the grantees and experts within their programmatic spheres. Likewise, the Foundation generally seeks to learn the context grantees are operating within and leverage their perspectives when making decisions regarding programming and use of the Foundation's voice.

# OSF Theory of Change

The OSF **theory of change (TOC)** assumes capacity building and leadership development serve as a central means of achieving the long-term goals. The TOC can be summarized as follows:

Working with multi-sectoral partners to develop and enhance enabling conditions for sound marine resource management in countries with globally significant marine biodiversity, and that account for the majority of global seafood production. Reinforcing the trajectory of that work by strengthening market demand for sustainable seafood and reducing trade of Illegal, Unreported, and Unregulated (IUU) seafood.

Building capacity and leadership across civil society and government stakeholders in focal countries to strengthen their abilities to engage and create durable institutions and reforms for the long-term sustainability of their ocean and coastal resources.

Equipping partners with knowledge relevant to their decision-making about the impacts of climate change and ocean acidification so that they can proactively support the ability of coastal and marine ecosystems to withstand pressures over time while providing growing benefits to human communities.



Figure 1: The strategic approaches and global levers of change that underpin the OSF TOC

Photo Credit: Packard Foundation Ocean Strategic Framework, 2016

## Evaluation Questions

EQ1

### Relevance:

To what extent are the Country and Global Strategies' theories of change (TOC) still valid and relevant?

EQ2

### Integration:

To what extent are the Foundation's Country and Global Ocean Strategies sufficiently integrated?

EQ3

### Effectiveness:

To what extent has OSF achieved its objectives nationally and globally? What has worked or not, and why or why not?

EQ4

### Equity:

In what ways is OSF advancing (or not advancing) equity, particularly in program design and beneficiary impact?

EQ5

### Durability:

What has been done in each Strategy to promote durability of outcomes? What seems promising/likely to work?



## Evaluation Questions: EQ1

### EQ1 Relevance:

To what extent are the Country and Global Strategies' theories of change (TOC) still valid and relevant?

**EQ1.1** How have exogenous factors affected the relevance and appropriateness of the Country and Global Strategies? (to country context/needs; relevance to broader OSF context)

**EQ1.2** Have our assumptions turned out to hold true and is change happening as we'd anticipated?

**EQ1.3** To what extent are the country and global TOCs truly encompassing of the Foundation's work (including non-grant work)?

**EQ1.4** To what extent are TOCs grounded on a strong evidence base?

**EQ1.5** To what extent have the TOCs adapted based on learning?

**EQ1.6** (Indonesia) To what extent is the model we've put in place sound? (i.e. Is it effective? Have you put in place enabling conditions?)

**EQ1.7** (Science) What have been the most effective models the Science team has used to build capacity across OSF Country/Global Strategies?

## Evaluation Questions: EQ2

**EQ2 Integration:**  
To what extent are the Foundation's Country and Global Ocean Strategies sufficiently integrated?

**EQ2.1** What have been the high-reward opportunities for integration? Have there been any missed opportunities?

**EQ2.2** To what extent has the use of the Foundation's voice and brand/profile affected integration?

**EQ2.3** How effective have non-grant resources been at improving integration?

**EQ2.4** (China) Is the China Strategy sufficiently integrated/coordinated with non-philanthropic donors/funders?

**EQ2.5** (Chile) Is the Chile Strategy sufficiently integrated/coordinated with non-philanthropic donors/funders?

**EQ2.6** (Mexico) Is the Mexico Strategy sufficiently integrated/coordinated with the IUU and Climate Strategies?

**EQ2.7** (USA) Is the US Strategy sufficiently integrated/coordinated with the IUU, Climate and Science Strategies?

## Evaluation Questions: EQ3

**EQ3 Effectiveness:**  
To what extent has OSF achieved its objectives nationally and globally? What has worked or not, and why or why not?

**EQ3.1** What model/structure (implementation modality) works best?

**EQ3.2** To what extent has the Foundation's non-grant investments been effective?

**EQ3.3** To what extent has the use of the Foundation's voice and brand/profile affected achievement of objectives?

**EQ3.4** (Indonesia) To what extent has our investment built or strengthened capacity?

**EQ3.5** (Indonesia) To what extent has our technical assistance to ministry staff affected policy? What have been the enablers and barriers?

**EQ3.6** (China) Where and how are CSOs listened to and used by different levels of government?

**EQ3.7** (China) What mechanisms are CSOs using to engage with government and influence policy?

**EQ3.8** (China) What are CSOs' objectives and how do they align (or not) with Packard objectives?

**EQ3.9** (China) What kinds of non-grant support have been most important to supporting grantees?

*Continued on next page.*

## Evaluation Questions: EQ3

**EQ3 Effectiveness:**  
To what extent has OSF achieved its objectives nationally and globally? What has worked or not, and why or why not?

**EQ3.10** (Japan): What have been Packard's most effective techniques to affect and respond to domestic policy changes? (how we pull organizations together, how we orient them, etc.)

**EQ3.11** (Japan) What have been the most effective forms of non-monetary assistance to our grantees and what other types of assistance (non-grants) would be valuable in the future?

**EQ3.12** (Mexico) How effective have Packard's efforts been in addressing of small-scale fisheries IUU?

**EQ3.13** (Science) Under what preconditions have internal and external stakeholders been able to most benefit from Science investment? (What are the appropriate levels and interactions of knowledge sharing/etc. What leads to use?)

## Evaluation Questions: EQ4 and EQ5

**EQ4 Equity:** In what ways is OSF advancing (or not advancing) equity, particularly in program design and beneficiary impact?

**EQ5 Durability:** What has been done in each Strategy to promote durability of outcomes? What seems promising/likely to work?

**EQ4.1** (Indonesia) Who within these communities have benefited and how? Where have our efforts potentially spurred inequity?

**EQ4.2** (Indonesia) To what extent are we adequately listening to local partners? Are they interested and engaged with our strategy?

**EQ4.3** (Science) How has the Science sub-program address equity issues in itself and assist other Programs and Strategies in addressing these?

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**EQ5** does not contain sub-questions.

# Evaluation Approach and Methodology

The OSF evaluation followed a mixed-methods approach, supplementing qualitative interview data with a desk review of over 400 Ocean strategy documents, grantee reports, academic literature, Ocean partner evaluation products, and grey literature from Foundation partners, a grant portfolio mapping and analysis, and in-person workshops in Jakarta and Los Altos to ground-truth emerging findings and recommendations with Foundation staff, grantees, and partners.

From October 2019 to January 2020, the evaluation team (ET) conducted fieldwork consisting of 1) in-person key informant interviews (KIIs) in California with Foundation staff and partners, 2) in-person KIIs and direct observation in deep-dive countries, China and Indonesia, and 3) remote and in-person KIIs with high priority stakeholders relevant to the remaining country and global strategies included under the OSF. The ET applied purposive sampling, with the help of Ocean program staff, to identify KII participants. In China and Indonesia, the ET used snowball sampling to find interview participants via in-person recommendations to get as close to local community respondents as time allowed.

The ET coded all primary qualitative data using the analysis software Dedoose and analyzed data by stakeholder type, country, institution, and role to capture divergences. Once coded, the ET triangulated data from individual interviews with other respondents, grant reports, and the external literature.

## Key Informant Interviews

	Packard	Grantees	Gov.	Industry	Co-funder	Community	External Experts	Total
Chile	1	3	1		1			6
China	1	18	4		2	3	5	33
Indonesia	2	19	7	6	2	1	1	38
Japan	2	3			1			6
Mexico	1	6			1			8
US	1	10						11
Birds	1	3						4
IUU		1						1
Science	1	1			1			3
Tuna	1	2						3
Cross-Cutting		2			1			3
<b>Total</b>	<b>11</b>	<b>68</b>	<b>12</b>	<b>6</b>	<b>9</b>	<b>4</b>	<b>6</b>	<b>116</b>

Table 1: OSF Evaluation Key Informant Interviews by Stakeholder Group

# Limitations

	Description	Mitigation
<b>Sampling</b>	Sample selection was largely guided by consultations with Ocean Team and cross-cutting program staff. This can result in selection bias, as stakeholders may be more likely to guide evaluators toward those who have had positive experiences with the Foundation’s work. The number of government and community informants was very limited, as were respondents from the non-deep dive focal countries and strategies.	The ET supplemented qualitative interview data with a rigorous desk review of grant reports, academic papers, and gray literature while coordinating with other ETs to fill in gaps (namely the Global Seafood Market’s). The ET believes that sampling gaps remained with respect to government and particularly community informants.
<b>Response Bias</b>	Some grantees’ operations and livelihoods are contingent on the Foundation’s funding, which could lead to respondents overstating the benefits of the Foundation’s contributions and corresponding outputs.	The Foundation’s letter to grantees asking for transparency and emphasis on capacity-building rather than programmatic outcomes helps to mitigate this risk. The ET also used an introductory script for all interviews highlighting the evaluation as a learning exercise where feedback was useful and welcome.
<b>Breadth of evaluation</b>	The OSF evaluation covered six focal countries and four global, cross-cutting strategies through five main evaluation questions and 29 sub-questions. Outside of deep-dive countries China and Indonesia, this necessarily limited the amount of data collection that could be conducted in each country and strategy. It also limited the ability of the team to conduct substantive community-level interviews. Substantive differences exist in KIIs and efforts allocated to deep dive vs non-deep dive countries and strategies, and the ET urges interpretation of results accordingly.	The ET triangulated information from multiple data sources, including across separate, concurrent Packard evaluations, external literature, and Foundation documents where primary data collection was limited.
<b>Remote Fieldwork</b>	KIIs outside of California, China, and Indonesia were conducted remotely, over phone or Skype. This can alter the dynamic of the interview, as the ET was unable to incorporate body language and other non-verbal cues into the KII.	The ET began interviews with explanations of evaluation purpose and questions about overviews of respondents’ activities to build rapport and ended interviews with open-ended questions to give respondents space to express themselves. This typically did lead to additional information garnered.
<b>Available data</b>	The design of this evaluation was based on qualitative fieldwork and desk review, meaning that no primary quantitative data were collected and the ET relied on the Foundation’s MEL data for supporting quantitative evidence of findings. Systematic MEL data were not available in all cases.	The ET has marked our level of confidence in each finding throughout the report to note how reliable findings are. The ET has also cross-referenced findings with best practices and external evidence from the literature, including quantitative studies.

## Navigating this report.

This report is organized by evaluation question (EQ), with each main evaluation question acting as a chapter. Cross-cutting evaluation sub-questions (those not specific to a focal country or the Science sub-program) are sections within these chapters, and each of these chapters ends with a summary slide highlighting the main conclusions for the EQ.

Following EQ 5.0, the report contains chapters for each focal country and the Science sub-program which address the sub-EQs specific to those Strategies and Program.

The report concludes with cross-cutting conclusions — themes that arose throughout different evaluation questions — and recommendations. Recommendations are grouped broadly by EQ, though some recommendations may stem from more than one EQ. The EQs and sub-EQs to which the recommendations are linked are indicated in parentheses at the end of each recommendation.

Each slide which presents findings includes a **confidence index** in the bottom-right corner.

These include an approximate assessment of whether the ET has high, medium, or low confidence in the finding, and a brief reason why. Most have high confidence and very few will have low confidence, as the ET tried to verify data to the extent possible and eliminate low-confidence findings as much as possible. These are intended to help the reader in interpreting findings and conclusions.

**High confidence** is where there is agreement between external/scientific sources and our primary data collection where relevant, or consensus among respondents where the question was more specific to the Foundation.

**Medium confidence** is where either relevant primary data collection or external literature was limited, but the other was consistent.

**Low confidence** is where the evidence is limited to a few interviews and not verifiable with external literature.







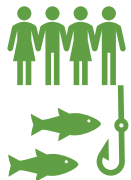
## EQ 1: RELEVANCE

**To what extent are the Country and Global Strategies' theories of change (TOC) still valid and relevant?**

### EQ 1.2: RELEVANCE

**Have our assumptions turned out to hold true and is change happening as we'd anticipated?**

This report combines the discussions of EQ 1.0, dealing with the validity of the OSF TOC overall, and EQ 1.2, which questions the validity of the Ocean team's assumptions about the OSF. While these assumptions are not explicitly articulated in the OSF TOC, the ET's analysis generated four main hypotheses that underlying the TOC. The ET engaged in sense-making with Ocean staff to ensure these hypotheses reflected the assumptions of the OSF team. In this way, our discussion of the validity of the OSF hypotheses will speak to the validity of the TOC.



## Selection of Focal Countries, Pragmatism and Flexibility

The Ocean team's selection of Focal Countries was systematic, science-based, and aimed at transforming the geographies most relevant to global wild capture and small-scale fisheries, marine aquaculture, and biodiversity. The underpinning rationale (influence and relationship to intended outcomes, existing data, etc.) that supported their inclusion is still valid and relevant.

That stated, the root problems that the Foundation seeks to address are not limited to specific geographies but cut across them. As such, and in addition to the country strategies, the Foundation also adopted strategies focusing on three global drivers\*:

- Global Seafood Markets,
- Illegal Unreported and Unregulated fishing,
- Climate change and acidification of the ocean.

The Foundation has also continued to support initiatives related to Marine Birds.

The complex challenges addressed by the strategy require that the Foundation adopted a pragmatic and flexible approach which:

- Adapts multiple approaches to actual conditions, and at a variety of levels of management, governance, economic activity, and social engagement.
- Approaches cross-cutting strategies with flexibility, as well as flexibility with respect to the extent and timing of interventions for fisheries, aquaculture, habitat and biodiversity protection according to the opportunities and needs.
- Adopts a long-term view to securing durable change and flexibility toward the accomplishment of long-term goals.

\*The Foundation also addresses drivers through resources to reduce emissions that contribute to global climate change (through its Global Climate Mitigation and Climate and Land Use strategies), and on global population growth, including promoting women's reproductive health and rights (through its Population and Reproductive Health program).

## Though not explicitly stated, four key hypotheses underpin the OSF.

The OSF TOC is driven by four major hypotheses related to the current trajectory of the ocean's marine resources, the factors driving this trajectory and the conditions that will steer change in the ocean toward the Foundation's long-term objectives:



**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.



**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation: commercial fishing, climate change, coastal and habitat destruction, and pollution.

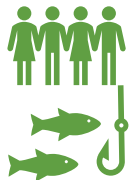


**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

- Sound policies, regulations, and their application
- Decision making based on best available knowledge and information
- Market incentives for sustainable and responsible marine resources
- A citizenry aware of the dangers and opportunities
- Competent institutions and leadership across sectors



**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.



## Current studies support Hypotheses 1 and 2: Overview

**Human utilization of the ocean is increasing. Growing demand and new technologies have rendered much of the ocean accessible to economic utilization which has resulted in a race among diverse and often competing interests for ocean food, materials, and space (Jouffray et al., 2020).**

Since the 1960's, seafood has become a growing commodity. Technological advances have allowed humans to fish at greater depths and farther distances: yet yield of wild capture remains stagnant, indicating declining global stocks.

As land-based resources have declined, extraction of an increasing number of ocean-based materials has become economically attractive, including hydrocarbons, mineral deposits, construction aggregates such as sand and gravel, and marine genetic resources.

Infrastructure and equipment for fishing and boats, ports, aquaculture farms, wind farms, fiber optics, pipelines, and deep-sea mining equipment and mining concessions all compete for space in the ocean. Of all major discoveries of hydrocarbon deposits between 2000 and 2010, 70% took place offshore. Exploratory mining licenses have been granted for 1.3 million km<sup>2</sup> of seabed in areas beyond national jurisdiction, and more than 16,000 desalination plants have been built.

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

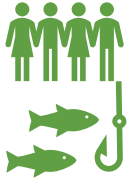
**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

**Anthropogenic factors such as climate change, over-fishing, land-based and marine pollution have a cumulative impact habitat destruction, marine ecology and fisheries.**

Halpern et al., (2019) report that 59% of the ocean is experiencing an increasing cumulative impact of human activity, while only 5% of the ocean human impacts are decreasing. The most prominent sources of stress include climate change, ocean acidification, overfishing, and pollution.

Other studies also point to specific anthropogenic factors that continue to threaten marine biodiversity and ecosystem integrity including land-based pollution, sea mining, coastal development, agricultural run-offs, and the rapid increase in maritime transportation (Bruno et al., 2018; Hurd et al., 2018).

A combination of these factors has resulted in greater coastal habitat and coral reef loss and has increased the impacts of floods and hurricanes for 100 million to 300 million people living within coastal areas (Dias et al., 2019).



## Current studies support Hypotheses 1 and 2: Climate Change and Ocean Acidification

The effects of climate change and ocean acidification have intensified and, in combination with unsustainable management practices, are resulting in ecosystem degradation and fisheries disruption.

### Fluctuating ocean temperature negatively affects ecosystems:

- The period of 2015 to 2019 registered the highest ocean temperatures on record as well as increased ocean acidification (IPCC 2019).
- The Intergovernmental Panel on Climate Change reported marine species have shifted geographical range and seasonal activities in response to ocean warming, sea ice change, ocean circulation, and biogeochemical changes to their habitats such as acidification and oxygen loss. These factors have caused changes in species composition, abundance, and ecosystem biomass production (IPCC 2019).
- IPCC conclusions are backed by multiple sources indicating species are adapting to changing water temperatures by shifting habits or moving to new locations (Hall-Spencer and Harvey 2019; Miller et al., 2018; Gaines et al., 2018).

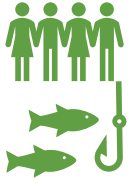
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“A lot of us can agree that climate change is the number one threat to ocean health... if I had any comment on [the OSF], it might be that... their future plans could elevate the issue of climate change. It’s important to building resilience in the ocean space.”

“We realized that Packard doesn’t have a climate change policy or strategy... We as an organization see it as our responsibility to work against climate change, but we don’t see that within Packard as a vision. They don’t seem to be focusing on climate change or funding programs related to it.”

16 KIs noted climate change as a high priority issue, though they did not see the Foundation as currently actively addressing this issue.



## Current studies support Hypotheses 1 and 2: Cumulative human impacts on oceans

### Human behavior is increasingly impacting marine ecosystems:

Halper et al., (2019, 2015) examined the annual intensity of 14 human stressors and their impact on 21 marine ecosystems over 11 years (2003–2013) to assess pace of change in cumulative human impacts (CHI) on global oceans.

- Increases in the frequency temperature events of high sea surface account for about 75% of the observed increase in CHI at the global scale, and ocean acidification is the next fastest increasing impact, with an additional 16% of the increase in CHI.
- Nearly 66% of the ocean and 77% of national jurisdictions show increased human impact in their ecosystems, particularly on coral reefs, seagrasses, and mangroves, which are at most risk. Only 5% of the ocean is experiencing a significant decrease in CHI.
- Regions with a median score of CHI acceleration will experience a doubling of those impacts in about 10 years.

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

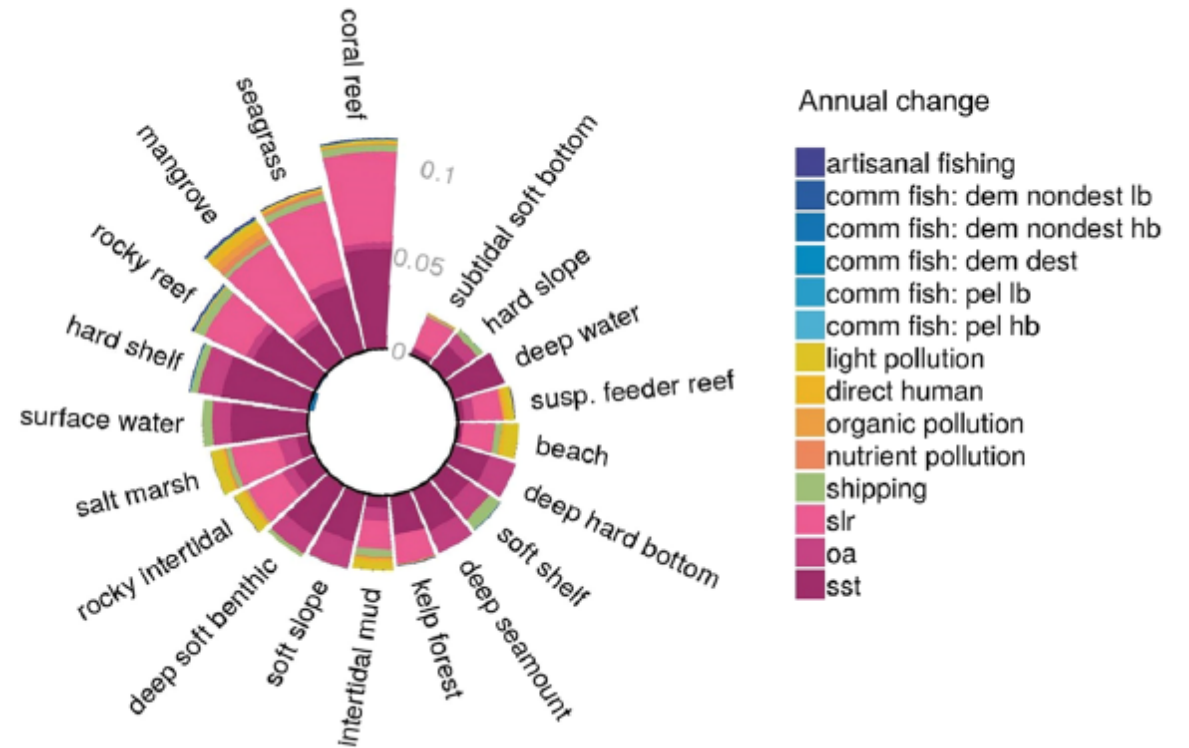
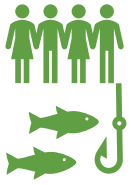


Figure 2. Annual change in marine ecosystems due to human stressors. Credit: Halper et al., 2019



## Current studies support Hypotheses 1 and 2: Cumulative human impacts on oceans

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

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### Human behavior is increasingly impacting marine ecosystems (cont):

- Other important, global-level stressors are fishing, land-based pollution, and shipping. Klls perceived plastics to be an emerging issue in need of further attention.
- Most demersal fishing impacts increased globally, but 53% of countries experienced declines in three or more of the five categories of commercial fisheries pressures.
- When sea surface temperature (SST) trends were removed, the cumulative impact of the remaining 13 stressors still increased over time for 92% of countries. This suggests that stressors other than SST, often functioning at local scales, are significantly increasing across most of the globe, and current management at these scales is doing little to slow the pace of increasing change (Halper et al. 2019, Halper et al. 2015).

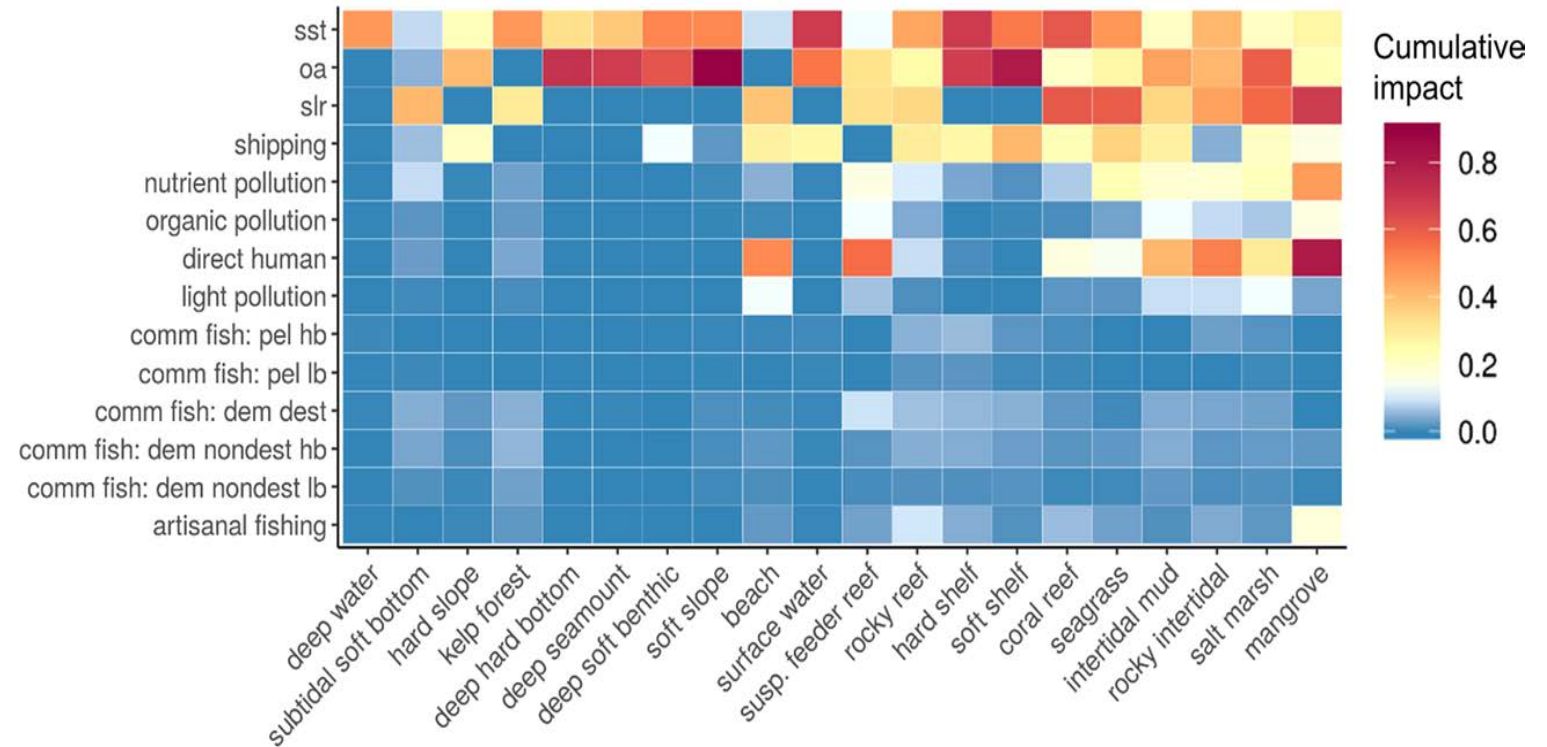
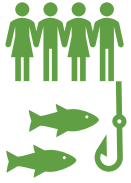


Figure 3. Annual change in marine ecosystems due to human stressors.  
Credit: Halper et al., 2019





# Current studies support Hypotheses 1 and 2: Overfishing

**Over half of global stocks are fished at a biologically sustainable level. Nonetheless global stocks have continued to decline, with overfishing a major factor. Global fisheries are under increasing pressure despite some progress in rebuilding stocks and improving conditions in some fisheries.**

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

## INCREASED SEAFOOD CONSUMPTION

Population growth and rising incomes have contributed to a sharp rise in global seafood consumption, which grew from 9.0 kg per capita in 1961 to 20.2 kg in 2015, at an average annual rate of about 1.5% (FAO 2018).

## CAPTURE FISHERIES

FAO (2018) estimates that in 2015, 59.9% of the global stocks were fished at a biologically sustainable level. CEA (2020) estimated that about 28% of the global wild capture come from fisheries that are relatively well managed or are MSC certified, and an additional 10% comes from fisheries in active FIPs. Some fisheries have recovered in the recent decades.

Despite these evidence that sound management of fisheries is possible, the stocks fished at biological sustainable levels have declined from 90% in 1974 to 66.9% in 2015, while unsustainable managed stocks have increased from 10% to 33.1% in the same period. FAO reports that 33.1% of the fisheries are overfished or collapsed and only 7% are underfished (FAO 2018). Other studies report a faster decline (Pauly and Zeller 2016).

## DROP OF PRODUCTIVITY IN CAPTURE FISHING

Capture fishing has declined or plateaued (see Figure 4). Despite improvements in technology, the catch per unit of effort has declined by 50 percent since 1950. Even with the extension of the geographical reach of the fleet, the catch per ocean area still declined by 22% since 1991 (FAO 2018). The drop of productivity per unit of effort and the diminishing productivity despite the expansion to new ocean areas indicates that global fisheries might be reaching the geographical limits of expansion.

## AQUACULTURE

Aquaculture represents 47% of total fish consumption and is projected to provide 60% of fish for human consumption by 2030 (FAO 2018). While the expansion of aquaculture fills the growing demand for seafood, demand for only a few species increases risk of disease spread that can affect supply. Also, the rising prices of fish feed has resulted in more vegetable-based fish feed, altering the nutritional content of aquaculture seafood, including a reduction in omega-3 fatty acids (Golden et al., 2016).

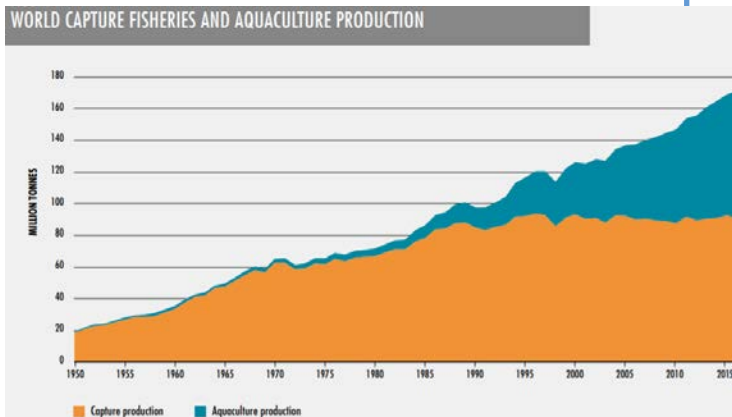
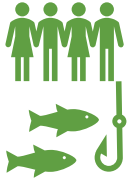


Figure 4: World Capture Fisheries and Aquaculture Production. Credit: FAO 2018



## Current studies support Hypotheses 1 and 2: Climate change and ocean acidification will severely affect fisheries.

### Climate change and pollution affect stocks in varied ways.

- A model simulation using data on 915 single and mixed-species stocks and encompassing 67% of the world fisheries found that climate change will likely disrupt most current fisheries (Gaines et al., 2018).
- Other studies report that fishing and aquaculture are particularly vulnerable to the impact of marine pollution when coupled with other factors such as overfishing and climate change (Beaumont et al., 2019).
- Climate change's impact on fisheries is relative to the condition of stocks. Stocks that are exploited for longer periods of time are likely to fare worse (Free et al., 2019; Gaines et al., 2018).
- Although only 22% of stocks will experience future increases in both harvest and biomass, this subgroup includes some of the highest-yield stocks and cumulatively makes up about half of the total global yield (Gaines et al., 2018).
- “Stock movement is ultimately beneficial to one country and detrimental to another, which changes the incentives to cooperate in effective management” (Gaines et al., 2018).

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

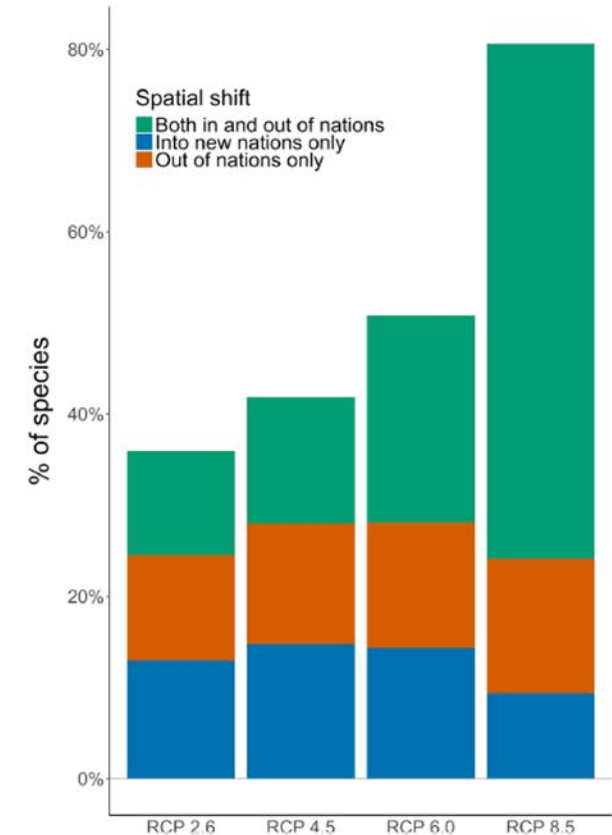
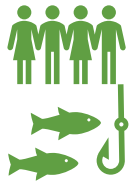


Figure 5. The percentage of individual species that will shift across [RCP 8.5]  
Credit: Gaines et al., 2018



## Current studies support Hypotheses 1 and 2: Strategies can mitigate anthropogenic stresses on fisheries

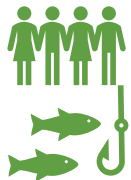
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### Mitigating negative effects of climate change on fisheries:

Studies indicate the following approaches help build resiliency to climate change within fisheries:

- Sound fisheries management, including the control of overfishing, timely information, sound governance, flexible management, and timely information to track the size of stocks to continuously adjust allowable catch to biologically sustainable levels (Miller et al., 2017).
- Control of factors that undermine resilience, such as loss of biodiversity, habitat destruction, pollution, invasive species, and pathogens (Miller et al., 2017).
- Investment in transboundary solutions, including robust transboundary institutions, monitoring of species migration across jurisdictions as species migrate, and capacities to negotiation among marine managers as stocks shift jurisdictions (Miller et al., 2017; Free et al., 2019; Gaines et al., 2018).



Current studies support Hypotheses 1 and 2: The OSF is relevant to altering the degradation trajectory.

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

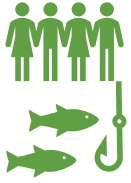
### The Foundation is directly contributing to making fisheries more sustainable.

- The Foundation has contributed to the acceleration of efforts to improve systems and to develop capacities to manage fisheries. A growing proportion of the global fish catch (currently 38%) is relatively well managed (CEA 2020: 40)
- The Foundation directly supports FIPs in Mexico, Chile, Indonesia, and Japan.
- The Indonesia Marine Strategy is developing FIP archetypes that can be applied at local, provincial, and national scales and develops approaches supporting timely information for fisheries management such as DLM systems (supported by the Science sub-program), SNAPPER and Blue Swimming Crab initiatives.
- The Foundation has contributed to the development of support systems (such as MSC certification) and to the establishment, development, and spread of market chains of sustainable seafoods with strong industry participation.
- The Foundation's has provided scientific information to inform policies and regulations for sustainable management of fisheries
- The Foundation is active in public information and awareness raising

MSC certification and FIP engagement are important instruments through which the Foundation supports fisheries management improvements. MSC certification and FIPs contribute to ecosystems protection by addressing issues such as:

- Endangered, threatened and protected (ETP) species
- Ghost gear
- Bycatch
- Key low trophic level species requirements
- Shark finning
- Accessibility to squid, crab, and octopus fisheries
- A risk-based framework to ensure accessibility for data-limited fisheries

(MSC Annual Report, 2019)



## Current studies support Hypotheses 1 and 2: Overfishing is contributing to the depletion of ocean and marine resources.

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

### IUU continues to be a major factor contributing to unsustainable fisheries and human rights abuses.

#### A PRIORITY ISSUE

While IUU is difficult to calculate, available studies indicate that in 2015, IUU fishing was around 10–17% of the total landings (Sumalia et al., 2020). IUU figures prominently in the international agenda and countries have adopted measures to combat IUU. Among Organization for Economic Co-operation and Development (OECD) countries, most have designated communication channels and standards pertaining to IUU (FAO 2018).

#### APPLYING LAWS AND REGULATIONS

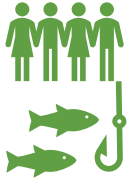
Despite these developments, many countries still have weak regulations, lack mechanisms to encourage compliance, and maintain subsidies that support IUU fishing. IUU operators in turn move their operations to jurisdictions with weak regulations (Hutniczak et al. 2019; FAO 2018).

#### EMERGING TACTICS

Given IUU encompasses a large proportion of the global catch, tackling IUU effectively supports stock recovery at little-to-no cost to current legal fisheries (Cabral et al., 2018). Technologies that may improve monitoring include handheld devices, user-friendly Global Positioning System (GPS), improvements in data storage and analysis, use of drones and satellite imagery, onboard cameras and Automatic Identification Systems (AIS), and Vessel Monitoring Systems (VMS). Certification schemes have helped introduce many of these technological innovations.

#### OBSTACLES

The adoption of new technologies imposes high costs for small vessels as well as the need for trained operators, which small fishers cannot afford. Gaps in coordination between agencies, NGOs and relevant jurisdictional authorities also hinders effective information sharing and integration of IUU programs (Girard and Du Payrat 2017).



## Current studies support Hypotheses 1 and 2: Addressing Overfishing

**We have the methods and tools to reverse the current degradation trajectory in fisheries.**

Pons et al., (2017) write that “implementing and enforcing total allowable catches (TACs) had the strongest positive influence on rebuilding overfished tuna and billfish stocks. Other control rules such as minimum size regulations or seasonal closures were also important in reducing fishing pressure, but stocks under TAC implementations showed the fastest increase of biomass. Lessons learned from this study can be applied in managing large industrial fisheries around the world.”

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

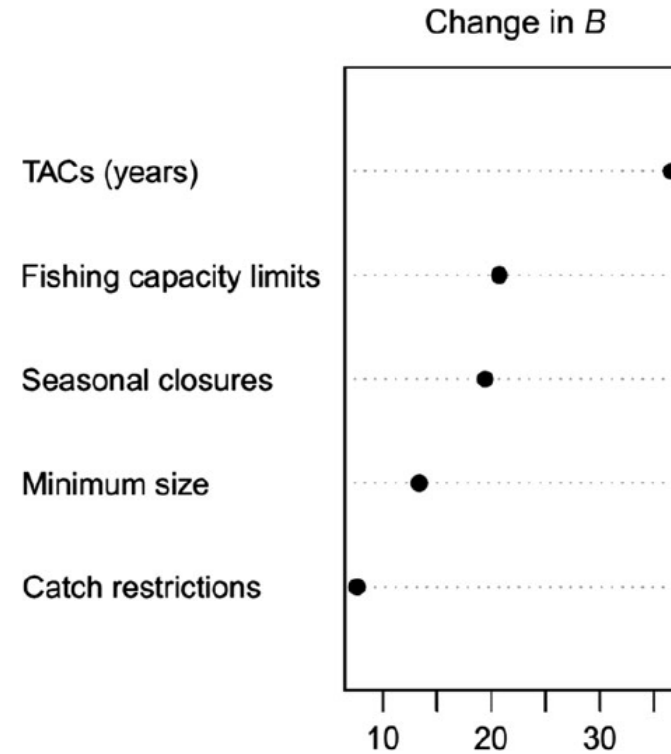
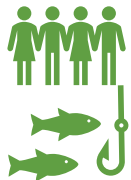


Figure 6. Impact of control rules on stock biomass increases  
Credit: Pons et al., 2017



Current studies support Hypotheses 1 and 2: Pollution is contributing to degraded marine resources.

**Hypothesis 1:** Human activity is the leading cause of the depletion of ocean and marine resources.

**Hypothesis 2:** It is possible to alter the current degradation trajectory by changing human behaviors that are driving resource degradation.

### **Pollution and fisheries:**

While plastics are a form of pollution for which ecological effects are not yet fully understood,

...some studies report that fishing and aquaculture are particularly vulnerable to the impact of marine plastic when coupled with other factors such as overfishing and climate change (Beaumont et al., 2019).

“[We] look for emerging issues and the biggest one lately has been plastic pollution....It’s not in the top ten threats to ocean health today, but it is ripe for action and we have the potential to make major change. Consumers, government, industry are lining up to make major change and strike while the iron’s hot....But Packard and others have taken a hard line against this. My sense is it’s a fidelity to their plan, and that the research they’ve undertaken has not identified this as one of the biggest issues for marine wildlife...but I think it’s one that could have potential to down the line...getting the public more aware of the ocean in general.”



# Hypothesis 3: OSF’s enabling conditions are consistent with external literature.

**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

The OSF identifies **five key conditions** that will enable a sustainable development trajectory of the global fisheries. These include:

1. Sound policies, regulation, and their application
2. Decision making based on best available data and a holistic understanding of the system
3. Market incentives
4. Effective communication of dangers and opportunities
5. Competent institutions and leadership across sectors

## Examples from the literature uphold the efficacy of all five conditions:



### Knowledge, Policy and Markets:

In Ecuador, the Mahi Fishery Improvement Project (FIP), financed by the Foundation, supported the development of a National Plan of Action under which FIP goals could be aligned. This approach been applied to different fisheries in the country. Working with key industry players contributed to the broader adoption of the approach, and industry players are now initiating their own FIPs.



### Knowledge, communication, institutions:

In Sweden, a successful transition to more sustainable wetlands management illustrates the use of science to develop new knowledge and raise awareness, collaboration of actors across scales, and the adoption of new governance systems that supported sound ecosystem management (Olsson et al., 2004).



### Policy, institutions, knowledge, communication:

An evaluations of the GEF Climate Change portfolio, covering 120 completed projects, concluded that projects were most successful in transforming market segments or adopting low CO2-emitting technology typically targeted policy and regulations, institutional capacities, science, technology, awareness raising, and financing (Zazueta 2017).



**Institutions and knowledge:** Similarly, a Global Environment Facility (GEF) evaluation of twenty years of support to protected areas concluded that the best conservation outcomes occurred when projects simultaneously contributed to conservation governance systems, built protected area management capacities based on best available scientific information, and engaged local populations.



### Knowledge, markets, communication:

A fisheries value chains evaluation in Indonesia concluded that awareness raising, science and technology, stakeholder involvement, and value chain development were all key enabling conditions for developing sustainable and equitable use of marine resources (UNIDO 2020).



**Knowledge and communication:** Gelcich et al., (2010) point out that sound scientific knowledge, awareness of stock depletion, and small-scale demonstration and learning projects were important factors in addressing collapsed fisheries.







## Hypothesis 3: Types of CSO leadership required vary based on context.

**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

**The OSF recognizes civil society organization (CSO) leadership as an important factor to promoting change. Leaders, entrepreneurs, and champions are often mentioned as important contributors to innovation (Maidique 1980) and varied contexts likely require varied roles and allow for different opportunities (Westley et al., 2013). The Foundation’s work has similarly adapted according to opportunities found in different situations.**

**For example:**

### MORE OPEN

Of the OSF focal countries, within the US, Mexico, Indonesia, and Chile, the political system has been conducive for CSOs to play a variety of roles that have included policy advocacy for regulations and budget allocations, coordination and collaboration with national or provincial governments, providing technical support to communities, collaboration with industry, and legal action to stop infrastructure development likely to have negative effects on marine ecosystems.

### MORE CONSTRICTED

In China, the space for CSO action is more restricted. Under these conditions, the opportunities for CSO engagement tend to be more confined to the scientific and technical realms such as engaging academia in informing policies. At the national level, the Foundation has played an important supportive role in the incorporation of scientific evidence in ocean policies in China by supporting key individuals or organizations with high credibility from policymakers. Foundation has also supported the work of CSOs with provincial, local governments and fishers and seafood traders to develop supply chains supportive to sustainable fisheries.

### SITUATIONAL

Supply chain roundtables (SRs) are widely viewed as an effective platform for education and engaging supply chain companies. There are currently 16 SRs operating globally with 69 FIPs including 151 companies (CEA 2020: 108). However, outside the US, SRs do not seem to be very effective avenues to engage governments in policy reforms. The organizations facilitating SRs are mostly concerned with retaining and expanding the participation of companies and are “hamstrung by needing to keep companies at the table” (CEA 2020: 109). Thus, there is a need for a “third party agitator” to compel greater action, a role CSOs can play.



## Hypothesis 3: The Global Seafood Markets Strategy (GSM) provides a framework that guides the OSF work in fisheries

**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

Evidence pertaining to GSM and OSF work on fisheries is integrated here from:

- the draft of the GSM evaluation carried out by Ross Strategic et al., (2020), and
- the FIP review carried out by CEA Consulting (2020).

### Two key assumptions of the GSM Strategy:

- “GSM strategies are based on the theory of change that creating business demand for sustainable seafood, coupled with engagement from the supply chain, motivates and enables seafood producers and partners to improve practices and the management of fisheries to enable seafood supply to meet this demand.”
- “GSM strategies also focus on mobilizing changes in policies and governance to drive responsible practices and sustainability in seafood markets and to prevent illegal, unreported, and unregulated (IUU) fishing, in part by engaging market actors to support such changes.”

(Ross Strategic et al., 2020:6)

### The CEA Fishery Improvement Projects Review concluded:

- “Consistent market demand is central to the success of FIPs; stronger and differentiated market benefits are desired at every level of the seafood supply chain.”
- “Government capacity and engagement in FIPs are essential for success; most FIPs in low-governance settings cannot make progress without government action”

(CEA 2020:9-10)

### The GSM Evaluation concluded:

- “Many major US, European, and Japanese seafood buyers have made sustainability commitments
- GSM tactics and tools such as standards, ratings, and certifications programs have been developed and implemented to support supply to meet this demand (more than 43% of wild capture seafood in N. America and Europe is certified), and new tools are being developed to support issues such as traceability
- Improvement mechanisms, such as (FIPs), have developed to move more fisheries toward sustainability standards, seeking to further incentivize improvements on the water
- Diverse platforms have developed to enable industry and NGO collaboration in addressing market challenges across seafood commodities (e.g., pre-competitive collaborations) and GSM tactics”

(Ross Strategic et al., 2020:7)



## Hypothesis 3: There are two emerging challenges to the Global Seafood Markets Strategy (GSM)

**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

Evidence pertaining to GSM and OSF work on fisheries is integrated here from the draft of the GSM evaluation carried out by Ross Strategic et al., (2020)

“Despite [the Strategy’s] progress, the evaluation suggests that investments and strategies have been insufficient to meet most of the foundations’ near term goals; shifts in focus and approach would be needed to accelerate market transformation to attain the foundations’ existing goals targeting the markets of North America, EU, and Japan and possibly expand to broader global impact” (Ross Strategic et al.2020: 7).

“Seafood market trends are also posing challenges; rapid growth of seafood consumption in Asia, Latin America, and Oceania, combined with China’s growing clout in seafood import markets, is weakening the influence of N. American and European markets; climate change and other issues are raising key uncertainties” (Ross Strategic et al., 2020: 8).



## Hypothesis 3: Access to financing is an enabling condition consistently addressed by Foundation grants that is not referred to in the OSF TOC.

**Hypothesis 3:** Five conditions can enable behavioral change toward a development trajectory conducive to the long-term goal of the Foundation:

### Financing as an Enabling Factor:

During development of the OSF, the Foundation considered access to financing a key enabling condition to achieving its 2030 goals. It was withdrawn upon finding that engagement with financial institutions was contingent on appropriate governance and regulatory systems being in place. If these conditions are built, financing could follow. This assumption applies to approaches that can generate goods and services tradable in the market. For example, CEA (2020) reports that in over half of the FIPs industry provides substantial support – almost doubling available resources.

While this assumption holds firm in some aspects of fisheries and aquaculture, it is less applicable to aspects related to habitat protection and MPAs. The critical need for MPA financing was mentioned by KIIs in Chile, Indonesia and Mexico. These are all countries in which large ocean areas have been placed under different forms of protection, but with no or very little budget to support their management. Similarly, when addressing environmental concerns, there is often a need to develop business models applicable to small producers (Keith et al., 2013). One example of the support provided by the Foundation is China Blue’s work developing insurance business models for aquaculture producers in Hainan. With the Foundation’s support, The Melony Fund and Catch Together work with small fishers in Indonesia and Philippines and have developed business models to manage the risks of financing fishing entry prices (Basu, 2018).

“First-generation marine-focused impact private equity and venture funds have not invested in FIP implementation, but next-generation approaches to FIP financing are under development, including WWF’s FIP Fund and the Multiplier Fund” (CEA 2020:25).

The Foundation has played a key role in developing funder collaboratives and other philanthropic initiatives to channel financing for FIPs and market demand generation for sustainable seafood.



## Hypothesis 4: Engagement with government in the formulation and application of laws and regulations.

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

### Engagement and Alignment with Governance

Governments are particularly important stakeholders in the management of ocean resources because they have jurisdiction and the legal right to set and enforce rules. Alignment with government policies is crucial to projects seeking long-term changes in marine resource usage, but governments have multiple goals and face pressures from diverse stakeholders that require constant tradeoffs and rebalancing.

A full alignment between philanthropic initiatives and government policy is not always possible. On the other hand, projects that find areas of alignment and cooperate with government also tend to have more influence on policies. Low government capacity, however, presents a challenge to collaboration and requires investments of time and money to raise awareness of critical issues and build capacity to understand and address them.

The most effective FIPs typically demonstrate good goal alignment with the government and engagement with other key stakeholders (CEA 2020). Examples include Morocco, where the FIP was found to make important contributions to the government and industry; Ecuador, where the FIP collaborated with government and industry to develop a National Action Plan; and Nicaragua, where the FIP established a coordinating working group with neighboring Honduras. The Foundation has a long history of supporting collaboration between CSO and governments. In Mexico, the Foundation's support of multiple CSOs working closely with the regional office of the National Commission of Natural Protected Areas has been key for major conservation achievements in the Gulf of California. In Indonesia, Foundation-financed FIPs are helping to establish harvesting strategies and control rules for blue swimming crab and snapper.



Hypothesis 4: The magnitude of the challenges requires the Foundation to work in partnership with key actors to accomplish its goal: Multilateral Institutions.

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

### Exploring Partnerships with Multilateral Organizations

The OSF assumes that the magnitude of challenges facing our oceans requires the Foundation to work in partnership with other key actors to accomplish its long-term objectives. The OSF explicitly mentions civil society organizations, scientists, industry, and governments. The Foundation has also worked with multilateral organizations in the past. Given the emerging, global challenges caused by climate change and the need to expand support in the Global South, this section explores of options to engage with multilateral organizations.

**This section** briefly presents the some of the work the Foundation has carried out with multilateral organizations and outlines potential opportunities for engagement related to:

- access to governments and policy making process,
- addressing transboundary concerns and impacts of climate change; and
- providing avenues to address administrative challenges and risks some countries pose to foreign philanthropies.

This section also briefly recounts the Foundation's engagement with global financial institutions.



## Hypothesis 4: The Foundation has a history working with multilateral and bilateral organizations.

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

The Foundation is aware that philanthropic resources alone are unlikely sufficient to achieve the OSF's expected 2030 outcomes. The Foundation's engagement with multilateral and bilateral organizations include at the global level, collaborating with the World Bank in the Sunken Billions report and the Foundation's participation in the ProBlue initiative. At the country level in Indonesia, the Foundation participates in an advisory board for the World Bank and coordinates activities with the United States Agency for International Development (USAID) and the Walton Family Foundation (WFF) through the SNAPPER initiative. In the 1990's, the Foundation also contributed to the GEF-supported Fondo Mexicano para la Conservacion de a Naturales (FMCN).

### Case Study



In the 1990s, the Foundation joined the GEF in the creation of the Fondo Mexicano para la Conservacion de la Naturaleza, now one of the most successful conservation funds in the world. Fondo Mexicano continues to be a key partner for Packard's Mexico Strategy and it is often presented as a model of national environmental funds internationally.



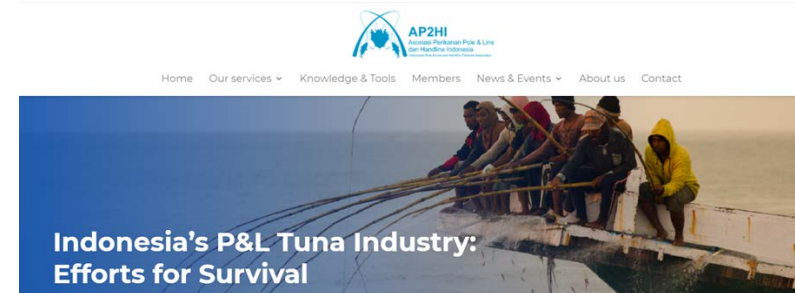
## Hypothesis 4: Multilateral institutions are neutral avenues to contribute to policies, laws and regulations.

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

Given the variety of economic factors, policies, and institutions that affect the utilization of ocean resources, it has been increasingly important to collaborate across sectors of the economy and among nation-states, as well as to engage stakeholders operating at different scales. These principles guide global collaboration such as the United Nations Sustainable Development Goals (SDGs) and initiatives under the umbrella of the Blue Economy (World Bank and United Nations Department of Economic and Social Affairs, 2017).

While bilateral and multilateral organizations have different modes of operation from philanthropies, further linking these organizations for specific purposes could be valuable. The operations of multilateral and bilateral organizations are often closely linked to government programs and priorities and are avenues to influencing policy, regulatory and institutional reform. One example is the current United Nations Development Programme (UNDP) Global Marine Commodities project, which supports FIPs and national policy coordination platforms in Costa Rica, Ecuador, Indonesia, and the Philippines. CEA (2020) reports that, in Ecuador, government engagement has in the small pelagic FIP has been critical to the current accomplishments.

## Case Study



In Indonesia, the SECO-funded SMART-fish project implemented by the United Nations Industrial Development Organization (UNIDO) also provided an avenue for communication and dialogue between a Foundation supported initiative and the Ministry of Marine Affairs and Fisheries (MMAF), through the establishment of a round table on tuna pole & line with the participation of Pole & Line and Handline Fisheries Association (AP2HI), the MMAF, universities and CSOs. The funding from SMART-fish to AP2HI was small compared with funding the Foundation and others were providing to AP2HI, but the engagement of SMART-fish provided a neutral forum in which AP2HI could present evidence on issues of concern to its membership such as the fishing ban in the Banda Sea, which AP2HI claimed was not supported by the scientific evidence, or on the tax rate of P&L tuna fishing, which was much higher than the tax to net tuna fishing even though P&L tuna is a more sustainable fishing method. AP2HI believed it would have been difficult to have such a forum for candid interactions with MMAF without the official link between the project and MMAF.

Photo: AP2HI





## Hypothesis 4: Multilateral institutions present avenues for addressing climate change and transboundary concerns.

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

### Climate impact and transboundary stock migration

Fish and water move across borders, requiring transboundary institutions to respond to marine pollution and climate-related fish stock migration. As climate change is likely to be detrimental to more than half of the catch of world's fisheries, robust institutions are needed to manage more intense competition for these resources (Gaines et al., 2018). Regional Fishing Management Organizations (RFMOs) are the primary instruments used to manage high sea fish stocks, and the Foundation supports some RFMOs through grants to MSC. However, most RFMOs have not yet initiated measures allowing for effective oversight of fishing operations, nor have many effectively halted overfishing (Cullis-Suzuki and Pauly 2010).

### Opportunities for collaboration

Over the last 25 years, inter-governmental organizations such as Partnerships in Environmental Management for the Seas of East Asia (PEMSEA) and Secretariat of the Pacific Regional Environment Programme (SPREP) have emerged as important, country-driven agents. Unlike RFMOs, these organizations do not have jurisdiction over the sea. Instead, they focus on supporting member countries to address challenges related to coastal zone management, pollution and litter, coastal fisheries, marine protected areas, and transboundary marine concerns. They are typically financed by a mix of funding from member country fees and multilateral or bilateral donors. These organizations coordinate very closely with governments and are well-tuned to country priorities. They also engage multiple stakeholders in their operations and are considered a valuable resource by member countries (GEF Evaluation Office 2012). Organizations like PEMSEA provide CSOs and academic institutions with avenues for policy dialogue with local, provincial, and central governments. They also have well-established country and regional structures that can serve as a testing ground for replicating and scaling results and to addressing transboundary coastal and ocean concerns.



## Hypothesis 4: Multilateral institutions are avenues to overcome onerous administrative requirements to foreign philanthropy.

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

### Opportunities for collaboration (cont.)

The UNDP/GEF Small Grants Program (SGP) is a country-focused, multilateral organization which operates under the United Nations collaborative agreements with governments. SGP has been operating for nearly 30 years and has a tested and well-established system for delivering small grants to community groups and NGOs, is a highly professional in its operations, and prioritizes capacity development. As such, the SGP may provide an avenue for grantmaking in countries such as China that present onerous requirements for international NGOs or philanthropies to operate.



The GEF/UNDP Small Grants Program provides financial and technical support to projects that conserve and restore the environment while enhancing people's wellbeing and livelihoods. The program provides grants of up to \$50,000 directly to community-based organizations and other non-governmental groups for projects in Biodiversity, Climate Change Mitigation and Adaptation, Land Degradation and Sustainable Forest Management, and International Waters and Chemicals. Since its inception in 1992, the Small Grants Program has provided over \$580 million to more than 21,500 projects around the world. In China for example, the SGP has operated over one hundred grants since 2009 for a total of just over \$5 million US dollars.



## Hypothesis 4: The magnitude of the challenges will require the Foundation to work in partnership with key actors to accomplish its goal: Financial Institutions

**Hypothesis 4:** The magnitude of the challenges will require the Foundation to work in partnership with varied, key actors to accomplish its goal and outcomes, including Non-Governmental Organizations (NGOs), academia, governments, bilateral and multilateral organizations, and other donors.

### Engagement with funders

Engaging with financial institutions requires models to manage the risks specific to small fishing enterprises and allow the volume of investment that investments funds may bring. An example of this kind of engagement is the collaborative arrangement supported by the Foundation between The Meloy Fund and Catch Together. These two organizations have developed business models that manage risks of financing fishing entry prices, working with small fishers in Indonesia and the Philippines. Catch Together focuses on defining harvest levels and negotiating sustainable catch quotas with the community (Basu 2018). The Foundation's Mission Investing (MI) team also partnered with the Ocean Team to invest in the [Althelia Sustainable Ocean Fund](#) based on the Foundation's MI criteria and risk assessment.

### Engagement with global platforms

The UN Global Compact Action Platform for the Ocean, which cultivates business leadership for sustainable ocean management (Folke et al., 2019), and investor codes of ethics such as Principles for Investments in Wild-caught Fisheries, helps entice industry to make commitments to sustainable ocean management. The Foundation also helped develop and has endorsed the Principles for Investment in Wild-caught Fisheries. All of these are initiatives that seek to engage financial sector actors in sustainable fisheries.



## EQ 1.2 Have our assumptions turned out to hold true and is change happening as we'd anticipated?

### Addressing Potential Unanticipated Consequences of the OSF

The Foundation is in the process of developing an approach to addressing issues related to diversity, equity and inclusion (DEI).

**This section** is meant to explore unintended, long-term risks of the OSF to local societies and ecologies which need to be tracked and managed. Some of these risks are already systematically tracked and addressed in the Foundation's work, such as risks fishing to species and to the ecosystem. Other risks, such as those to local economies and society (such as exasperation of inequalities) are addressed by some grantees who adopt a triple bottom line in the promotion of fisheries but are not systematically address by the Foundation. Still some risks, such as vulnerabilities of local society to market downturns merit a closer look and the development of systematic approaches by the Foundation. Another risk that merits attention is the unintended long-term nutritional impacts in the Global South of the current trends of seafood trade.



## EQ 1.2 Have our assumptions turned out to hold true and is change happening as we'd anticipated? (Risks of Unanticipated Consequences)

### Addressing risks to the ecosystem

The Foundation aims to support healthy, productive, and resilient ecosystems. Where conventional fisheries and aquaculture focus on maximizing the productivity of one or a few species, the Foundation promotes management practices that ensure catch is kept at biologically sustainable levels and that fishing and aquaculture schemes minimize detrimental effects to other species.

The Foundation's support for marine ecosystem resilience is incorporated in its Tuna and Marine Birds grantmaking, its country strategies' FIP financing, and GSM's funding for leading certification and rating programs. Examples of these measures include establishing biologically sustainable catch limits, conducting research to improve scientific knowledge on factors affecting marine species and habitats, pushing adoption of best practices around bycatch reduction and protection of forage and keystone species, and habitat protection.

Many industry representatives understand that marine resources are declining thanks to data collected for FIP management. For example, coastal processors in Indonesia and Nicaragua pressure fishers to adopt sustainable practices by refusing to accept fish that do not meet regulations nor from fishers that do not participate in the FIP (CEA 2020:11).

From 2003 to 2009, the Foundation launched the Ecosystems Based Management (EBM) Initiative. An internal technical report concluded that EBM projects had contributed toward a better understanding of ecosystems and tools for their analysis. However, the ecosystem management knowledge generated was constrained by social and institutional factors (David and Lucile Packard Foundation 2009). Projects could not address all the threats facing the ecosystem and had to prioritize issues. Projects that were able to advance the most were those that started small while keeping a larger ecosystem vision in their long-term goals (Leslie et al., 2015).

Other examples of Foundation support include its US-based swordfish fisheries to address mammal bycatch and a campaign to feed seabirds and other species by generating consensus among fishers on which areas to set aside for forage fish stock. Foundation grantees have also been engaged in the Pacific Fisheries Management Council's ecosystem assessment and the overarching fisheries ecosystem plan, which links fisheries management of several species to bycatch risks across the West Coast.



## EQ 1.2 Have our assumptions turned out to hold true and is change happening as we'd anticipated? (Risks of Unanticipated Consequences)

### Addressing risks and building resilience in local societies and economies

Potential unintended consequences include:

#### Social Risks

Significant literature exists showing that individual transferable quotas can result in negative social, economic, and equity outcomes, including:

- Consolidation of wealth and supply chain leverage in vertically integrated corporations and
- Negative impacts such as job losses, flow of capital away from rural areas, exacerbation of class divisions, and shifts in cultural values and identity falling disproportionately on less powerful segments of the industry, including crew, small business owners, and rural communities.

“Faced with new challenges in less developed countries and small-scale fisheries, FIPs are being drawn into the world of human rights, economic development, poverty reduction, and food security—likely for the better—making implementation more intensive and costly” (CEA 2020:26).

#### Tradeoffs between ecology and economy

For example, ensuring sustained maximum yield might support the sustainability of a fish species, but could negatively impact fishers' economic security. A study in Mexico concluded that management of fleet overcapacity and rent dissipation tended to push the income of fishers below the poverty line (Giron-Nava et al., 2019). Some fishers may choose to exit fisheries, but their ability to do so depends on their dependence on fishing to support their livelihoods and other national and global factors (Daw et al., 2012).



## EQ 1.2 Have our assumptions turned out to hold true and is change happening as we'd anticipated? (Risks of Unanticipated Consequences)

### Addressing risks and building resilience in local societies and economies

#### DISEASE RISK

Diseases affecting aquaculture can have devastating effects on regional production (Stentiford et al. 2017), such as with the spread of mortality syndrome disease in shrimp through all major producing countries in Southeast Asia and reaching as far as Mexico in early 2013, resulting in up to 60 percent losses in the affected regions compared to 2012 (Lee et al. 2015).

#### MARKET RISK

The recent trade war between the US and China severely disrupted the tilapia market chain in Hainan, China that supplied fish to the US markets. With the aid of China Blue, farmers and industry are now seeking to explore national markets and insurance schemes to mitigate risks of future losses. Similarly, while this evaluation was taking place, the COVID-19 pandemic severely disrupted the market supply chains supported by the Foundation in Indonesia and California, requiring a rapid response on the part of the Foundation and its partners. In California, the Foundation has financed organizations to make a case for federal relief to small fishers and to assist in the quick dispensing of relieve. The Foundation is also helping to ensure long-term resilience of local fisher communities by ensuring the equipment and fishing right remain under the control of local fisher associations. While in Indonesia the safety net institutions are weaker, at the time of the interview with the PO, the Foundation had found it more difficult to identify suitable responses in that context..

#### BUILDING RESILIENCE

NGOs like Conservation International, Fair Trade USA, FishWise, Future of Fish, Ocean Outcomes, Pronatura, SmartFish, The Coral Triangle Center, and China Blue have adopted a triple bottom line approach and seek to engage fishing communities in FIPs as a way to provide local incentives for resource stewardship (GSM Review 2020). Market diversification features in strategies of several of these organizations.



## EQ 1.2 Have our assumptions turned out to hold true and is change happening as we'd anticipated? (Risks of Unanticipated Consequences)

### Long term nutritional risk of current global seafood trade trends

Fishing is most prominent as a source of food and livelihoods in Asia. The continent has over 23,000 fishers from a worldwide total of 28,000 (FAO 2018) and about 53% of the global catch of capture fisheries is by Asian countries. China alone accounts for 20% of the global catch (Golden et al., 2016). While the expansion of aquaculture has contributed to meeting the growing demand for seafood, current trends in global seafood markets raise equity concerns related to the availability of seafood for future generations, particularly among the poor.

Aquaculture products with high nutritional value also tend to concentrate in a few species (shrimp, tilapia and pangasius), which are mostly exported to developed countries. Species increasingly available to low-income populations in developing countries are of lower nutritional value (such as carp). The rising prices of wild catch fish is also increasing vegetable content and decreasing fish protein content in feed for aquaculture. This trend is altering the nutritional content of seafood produced by aquaculture, particularly omega-3 fatty acids. Under current trends, 1.39 billion people worldwide or 19% of the global population (who are mostly in developing countries), will be vulnerable to micronutrient deficiencies by 2030 (Golden et al., 2016). Competition for land and space in the water also poses risks to the expansion of low-value aquaculture production (FAO 2018).





## EQ 1.1: RELEVANCE

How have exogenous factors affected the relevance and appropriateness of the Country and Global Strategies?

# Major exogenous factors affecting the relevance and appropriateness of Country and Global Strategies have been:

## + Enabling

- Passage of a fisheries reform bill and signing the Port State Measures Agreement in Japan
- Government pivot in China to prioritizing eco-civilization
- Growing public awareness of ocean related issues

These **enabling factors** have accelerated the Foundation's ability to make contributions through the existing Theories of Change. These have made the Foundation's strategy more relevant in those countries.

## — Hampering

- Administration changes in the US and Mexico resulting in less CSO access to national policymakers, budgetary cuts for environmental programming, and environmental policy and regulatory rollbacks
- Increased incidence of climate-related events
- Widespread, social unrest in Chile.
- COVID-19's disruptions for seafood market chains, requiring emergency support responses from the Foundation

These **hampering factors** have resulted in new challenges that are requiring adaptation in the way country and global strategies are carried out. The following slide explore the Foundation's response to the changes in the US Federal Administration.

The Foundation has responded to change in federal administrations in the US by adopting new strategies to support CSO coalition building and State policies.

### BACKGROUND

Following the 2016 US election, the Foundation created a Foundation-wide “Federal Response” that strategically targeted resources to defend the role of science and evidence-based decision-making in government. This included allocating additional or redirected resources to support the coordination of grantees and other organizations to the policy and administrative changes of the federal government. Preliminary evidence from an evaluation of the Federal Response initiative indicates that the Foundation's support has helped participating organizations have a unified voice.

### COALITION BUILDING

Over a five-year period, the Foundation funded the National Ocean Policy Coalition (NOPC) to bring 60 organizations into a coalition to advocate for protecting special places in the ocean, and more recently, to fight efforts that would eradicate protected area designations.

### STATE GOVERNMENT

The National Caucus of Environmental Legislators (NCEL), a grantee, is working with state leaders to protect their communities from the expansion of offshore oil and gas drilling.



## EQ 1.3: RELEVANCE

To what extent are the country and global TOCs truly encompassing of the Foundation's work (including non-grant work)?

The grants and other support provided are well within the boundaries established by the OSF and the different Country and Global Strategies.

In the ET's desk review of grant reports and summaries, analysis of MEL data, and KIs with grantees and Ocean Team members, no grants identified fell outside the bounds of the OSF and Country and Global Strategies. Grants were clearly linked to one or more of the three OSF outcomes (fisheries, aquaculture, and biodiversity) and one or more of the approaches (market incentives, policy, scientific and economic knowledge, and leadership and capacity building). A systematic review of grant data against the theory of change was not possible because of data quality issues with the grant database, though a preliminary review using these data supported this conclusion.

## The Foundation approaches aquaculture as a long-term issue and intends to address it over time.

Strategy MEL Data Provided	# grants mentioning aquaculture in dataset	# unique grants in dataset
Indonesia	1	25
Chile	0	15
Japan	1	15
China	3	15
Marine Birds	0	36
OSF	2	8
Mexico	2	42
Science	0	16
US	0	32

Table 2: Aquaculture grant distribution

### Aquaculture is not a current focus in the Foundation's grantmaking.

In the Foundation's 2019 MEL reporting, "aquaculture" is mentioned in eight grant descriptions out of 210 unique grants. Biodiversity and fisheries are included in numerous grants throughout, though the setup of the grant data does not allow for a systematic comparison of grants that fall into these three categories without substantial cleaning. This review should be taken as illustrative, given that the Foundation's grant-tracking and MEL system does not explicitly map grants against the OSF's expected outcomes except in the OSF-level indicator reporting. However, the overall finding of little aquaculture work aligns with the ET's review of Country and Global Strategy documents and KII qualitative assessments of the OSF portfolio. According to one KII, Country and Global Strategy teams have struggled to find a natural fit between aquaculture and their portfolios. Another KII noted that during strategy development, aquaculture was a longer-term issue and particularly relevant to China where aquaculture comprises two-thirds of the seafood production.

# Important non-grant work done by Foundation staff to support Strategies is not captured by the OSF TOC or Country and Global Strategies.

These include:



## MENTORING:

Ongoing support from Foundation staff to grantees in the form of strategic advice, information, and recommendations to other funders.



## GRANTEE LINKS:

Emphasis on fostering communication, coordination, and collaboration among grantees, including annual or biannual grantee workshops and incentives for joint proposals.



## USING VOICE TO ADDRESS FINANCING NEEDS :

Coordination and information exchanges with donors, including the support of funders groups, joint complementary funding with other funders and engagement with multilaterals and institutional funding instruments.

This work was appreciated and pointed out as effective in KIIs. They are described further EQ 2.3 and 3.2.



## EQ 1.4: RELEVANCE

To what extent are TOCs grounded on a strong evidence base?



The OSF, global, and country TOCs are founded on up-to-date scientific knowledge, and have evolved as the scientific evidence has evolved.

Program Officers widely consulted with Foundation stakeholders and grantees to develop and refresh strategies. Through these consultations, the Foundation also accessed research from institutions conducting research on ocean science and conservation. These include Foundation-commissioned reports from their learning partner, CEA Consulting, such as *Our Shared Seas* and the *Global Oceans Trends*, which review the state of support to oceans and identify the challenges and emerging developments in the sector. Such reports have been updated regularly, usually after two years. The Global strategies on GSM, IUU and Marine Birds, and the foundation work carried by the Science team on Climate Change and Ocean Acidification, address critical marine issues and opportunities widely discussed in the field (Dias et al., 2019). The addition of IUU and climate change as global strategies in 2016 followed the emergence of these issues as critical. These findings correspond to the scientific and academic literature more broadly, and specific supporting evidence of each strategy is discussed in detail in EQs 1.0 and 1.2.



Photo Credits: CEA 2019



## EQ 1.5: RELEVANCE

To what extent have the TOCs adapted based on learning?

The OSF, global, and country TOCs incorporate lessons and perspectives derived from previous Foundation activities. These are applied in ways that are consistent with evolving country needs.

The OSF TOC and Country and Global Strategies incorporate learnings from years of support provided by the Foundation. In the US, Mexico, and Indonesia, the Foundation drew on many of its previous partners and capacities when shifting from an emphasis on biodiversity to fisheries management.

In China, the Foundation's strategy was based on lessons learned from its earlier work there on climate change, including working with the scientific community in China and linking scientists and universities between the US and China.

The Asia Capacity and Leadership Development (ACLD) Framework has promoted cross-strategy learning through semi-annual meetings among the China, Japan, and Indonesia Strategies with organizational effectiveness (OE) to share progress, lessons learned, and agree on next steps.

Overall, the Foundation consistently updates its work based on learning, though these are only periodically formalized in Strategy updates.

The table to the right illustrates two examples of Foundation strategies adapting to new information and fieldwork-derived learnings.

Broader updates to the OSF TOC are based on learning from scientific research, syncing the TOC's focus to emerging critical issues, are described in EQ 1.4.

Strategy	Learning Point	Update
Mexico	Progress on MPAs in the Gulf of California and Yucatan Peninsula have moved forward the national-level discussion of conservation areas, and integration of GSM into the Mexico strategy.	Having made important contributions to MPA management and equipping small fishers in the Gulf of California with sustainable practices, the program is now expanding to the Peninsula of Yucatan and to support initiatives that generate national demand for sustainably produced seafoods.
OSF	OSF is experimenting with different forms of non-branded communication, such as grants to Communications, Inc. for coordination and amplification of ocean messaging. The Foundation has also recently commissioned a public opinion survey from Kantar which indicates a growing concern for ocean issues in focal countries.	OSF intends to use the findings from this work to develop a more explicit strategy for communications in future iterations.

Table 3: Examples of OSF learning through implementation. Source: Kantar (2020) *Perceptions of the Ocean and Environment*

## Relevance: Key takeaways

To what extent are the Country and Global Strategies' TOC still valid and relevant?

- The OSF Theory of Change remains highly relevant and useful to accomplishing the long-term objectives of the Foundation while also allowing for flexibility to respond to unexpected developments.
- Capture fisheries and MPAs continue to receive more support, while newer strategic priorities (aquaculture and Climate Change) have received less support than planned.
- While the Foundation consistently addresses financing in its work, the OSF TOC does not fully encompass financing as a key enabling condition for OSF operations.
- While overfishing, climate change, and ocean pollution continue to be major source of stress to fisheries and marine ecosystems, the rapid acceleration of the effects of climate change and ocean acidification require a more structured approach by the Foundation.



## EQ 2: INTEGRATION

To what extent are the Foundation's Country and Global Ocean Strategies sufficiently integrated?



## Integration takes place across different levels:



### STRATEGIES

The integration between the six Country and four Global Strategies (and with the exploratory Tuna work where relevant).



### GRANTEES

Within a Strategy, the integration between different grantees and activities to maximize synergies and minimize inefficient duplication. Grantees are covered in EQ 2.3.



### DONORS

Strategy integration and coordination with other donors to maximize synergies and minimize inefficient duplication or contradictory approaches. Donors are covered in EQ 2.2 and 2.3.



## Integration takes place across Strategies and in three main ways:



**THEMATIC OVERLAP AND CONSISTENCY ACROSS STRATEGIES**  
through the collaborative development of the OSF and the refreshes of the Country and Global Strategies.



**COLLABORATION ACROSS STRATEGIES**  
entails cooperation around specific activities, such as joint grants or work coordination, typically among two strategy teams.



**COMMUNICATION AND FACILITATION ACROSS TEAMS**  
by the Ocean Team management includes, though is not limited to, regular Ocean Team meetings and informal sense-making and strategizing among staff. In addition, the Deputy Director of the Ocean Team maintains a broad view of Strategy portfolios and facilitates complementarities.

The findings on these evaluation questions are structured to look at the integration of each Global Strategy with the Country Strategies, with sidebars on integration between Global Strategies where relevant. Because climate change is implemented under the Science sub-program, these two are grouped together. The ET considers “sufficient integration” to mean that the Foundation has reached diminishing returns on further collaboration.





## Different methods of integration carry unique tradeoffs



### THEMATIC OVERLAP

Coordination is less visible and achieved when one (usually Country) Strategy includes work using the same approach as another (usually Global) Strategy and supports the same objectives. These are not co-funded. This approach requires a high investment of time at the beginning but also produces recurrent payoffs in the form of consistent work among Strategies and within the OSF priorities.



### COLLABORATION

Achieved when Strategies explicitly are collaborating through shared funding or intentional coordination, the payoffs of this approach are accrued by the Strategy teams involved and have a relatively high ongoing or recurrent cost as it pertains to staff time.



### COMMUNICATION ACROSS TEAMS

Achieved when teams learn from one another, this approach has a high cost on management's time, moderate costs to strategy teams, and has high recurrent pay off.

## Strategic guidance and coordination

The Foundation has provided support and coordination to develop and implement the Ocean Strategy Framework over the past five years.



In 2015, the Foundation hired an Ocean team Deputy Director to better coordinate the program's Strategies in response to key, higher-level challenges on the ocean. The Ocean Strategic Framework laid out 15-year goals intended to help guide Strategy teams' priorities and directions towards long-term outcomes. The OSF has served as a vehicle to encourage updating or newly developed Country and Global Strategies to leverage their strategies and areas of expertise toward these shared priorities. Integration within the Ocean program has also entailed practices such as monthly Ocean Team meetings that enable cross-strategy communicating and learning. According to Foundation staff, having an individual responsible for facilitating communication among strategy teams and looking for opportunities for strategic cooperation took the burden of coordinating off individual Strategies and eased the integration process.

Photo Credit: Packard Foundation 2016



## The Country and Global Strategies are highly integrated through thematic overlap.

Country Strategy	GSM	IUU	Marine Birds	Climate & Science	ACLD
Chile	+	+	+	+	N/A
China	+	+	-	+	+
Mexico	+	+	+	+	N/A
Indonesia	+	+	-	+	+
Japan	+	+	-	+	+
US	+	+	-	+	N/A
Ratio	6/6	6/6	2/6	6/6	3/6

According to Foundation staff, the above integration with the Marine Birds Strategy was intentionally de-prioritized because either there was no clear programmatic outcome served by integration or the return on investment of integration was likely to be low. Because integration is time-intensive and only valuable when it results in better quality or higher efficiency, observations of less integration should not be taken as a recommendation for additional integration. The ACLD Strategy was designed to address specific capacity needs in the focal countries in Asia.

Table 4: Country and Global Strategies Integration



## GSM is integrated with all country strategies

All Country Strategies have components linking fisheries to sustainable seafood market chains. Grantees in Mexico, Indonesia and China are exploring ways to develop sustainable domestic markets and share related findings.

Country Strategy	Strategic complementarity	Work coordination	Nature of Integration
Chile	+	-	The Chile Strategy includes market-based outcomes related to territorial use rights for fisheries (TURFs). There was an intention to coordinate kelp (for the cosmetics markets) with the GSM Strategy and markets in Japan and China, but this did not take place due to supply chain conditions.
China	+	-	The China Strategy focuses on civil society and government capacity building. However, many grantees work on fisheries management and fishery improvement projects that are strategically in line and complements the work carried out by the GSM Strategy at the global level.
Mexico	+	+	The Mexico Strategy includes links with the GSM Strategy that is helping to develop fisheries and aquaculture that target export and domestic markets, contributing to the regulation of fisheries and working on certification and sustainability standards. This began through activities to improve fisheries management and are not linking to sustainable seafood markets.
Indonesia	+	+	The Indonesia Strategy was designed with input from GSM to link fisheries to sustainable seafood markets while also addressing governance concerns engaging NGOs, Scientists and Industry. The teams coordinate regularly and have carried out several coordinated grants and joint grants. IMS in collaboration with GSM are piloting three supply chain archetypes (blue swimming crab, snapper and tuna) that were selected because they are widely applicable in Indonesia and will be supported for scaling up in the future.
Japan	+	+	One of the Japan Strategy's main objectives is to build a sustainable seafood movement. The strategy ties the Foundation's Japan MEL to the GSM MEL plan and the budget has been supplemented by the GSM Strategy budget.
US	+	+	The US Strategy supports fishery initiatives that supply sustainable seafood to the US market. It also includes a partnership with the GSM Strategy to track implementation of the 2016 US Seafood Traceability Rule and scoping opportunities to address human rights issues in the seafood supply chain. Fisheries management work also promotes the supply of sustainable seafood.

Table 5: GSM Integration with Country Strategies



## IUU is integrated with all country strategies:

While there is no IUU strategy drafted, IUU work is coordinated with the Indonesia and Japan Marine teams. All focal countries strategies so incorporating IUU related issues related as part of their operations, including transparency, traceability, and good fisheries management.

Country Strategy	Strategic complementarity	Work Coordination	Nature of Integration
Chile	+	-	The Chile Strategy includes work on fisheries traceability, one of the pillars of the Foundation's IUU log frame. No coordination of specific activities with the IUU Strategy.
China	+	-	The China Strategy focuses on civil society and government capacity building and does not prescribe sectors. However, many grantees work on fisheries management, which can improve fishery compliance with regulations.
Mexico	+	-	IUU is not explicitly a part of the Mexico Strategy, though the Foundation works in improving fisheries management and making fisheries data available. These support the traceability and transparency pillars of the Foundation's IUU logframe (see also EQ 2.6 and 3.11).
Indonesia	+	+	The Indonesia Strategy includes coordinating within the Foundation on IUU Strategies. The Foundation works with the government's IUU Taskforce in Indonesia and supports improved blue swimming crab and snapper fisheries management, which should in turn improve compliance with regulations.
Japan	+	+	The Japan Strategy includes IUU reduction throughout its seafood markets and international policy engagement objectives. The Country team also financed activities related to IUU that contributed to the signing of the convention by Japan.
US	+	+	The US Strategy includes partnership with Oceans 5, funded through the IUU Strategy, to track progress in the 2016 US Seafood Traceability Rule. In the US the Magnuson-Stevens Fishery Conservation and Management Act (MSA) has led to a fairly well regulated. The key concern is more related to trade and the role of the US as an importer of seafood.

Table 6: IUU Integration with Country Strategies



# The Marine Birds Strategy Integration

The Marine Birds Strategy activities target geographies with high reward opportunities and are integrated with the Mexico, Chile, IUU, and Tuna Strategies.

Country Strategy	Strategic Complementarity	Work Coordination	Nature of Integration
Chile	+	+	The Chile Strategy explicitly outlines integration with the Marine Birds Strategy through protecting coastal areas including shorebird monitoring and protection in Chiloe Island.
China	-	-	
Mexico	+	+	Mexico is identified in the Marine Birds Strategy as a priority country and outlines specific conservation and capacity building areas for collaborative granting.
Indonesia	-	-	
Japan	-	-	
US	-	-	Sites in Washington and California are identified in the Marine Birds Strategy as priority sites for shorebird protection, though this is not the current area of focus due to re-assessment where resources can make the biggest impact.

Table 7: Marine Birds Integration with Country Strategies



### IUU:

The Marine Birds Strategy includes reducing seabird bycatch through regulation advocacy, increasing compliance, and other tactics.



### TUNA:

These bycatch reduction tactics include engaging tuna RFMOs in regulation implementation and supporting Birdlife International's participation in the NGO Tuna Forum.



## The Science sub-program Strategy Integration:

Science is mainstreamed throughout Country Strategies, though explicit coordination is most prominent in the US. Climate change is integrated in the US, Mexico, and Indonesia Strategies. Support to climate change and acidification have mostly address issues related to exploration of the impacts of climate change and of climate smart options to support the work carried out across the OSF teams.

Country Strategy	Strategic Complementarity	Work Coordination	Nature of Integration
Chile	-	+	Science is mainstreamed using research for work such as coastal wetlands management planning, fisheries, and siting MPAs.
China	-	+	Though the China Strategy and Science sub-program are not explicitly collaborating, the China Strategy gives grants to improve scientific knowledge related to fisheries management and to improve networks between scientists.
Mexico	+	+	Since 2018, the Mexico Strategy and Science sub-program have co-funded funded mangrove assessments. The teams are also studying the possibility of a scientific working group in Mexico to address blue carbon.
Indonesia	+	+	The Science sub-program and the Indonesia Strategy jointly funded research landscape mapping in Indonesia, including one set of pilot activities to support Ocean Climate Initiative, a Foundation initiative to integrate ocean and climate work.
Japan	-	+	Though the Japan Strategy and Science sub-program are not explicitly collaborating, the Japan Strategy aims to promote science-based fisheries policy.
US	+	+	The US Marine and Science Strategies are explicitly integrated, with co-funding to support US West Coast fisheries and habitat management working with California and Oregon.

Table 8: Science Integration with Country Strategies



### MARINE BIRDS:

The Science sub-program gave a grant to Island Conservation to support development of a threatened species database.



## Exploratory work on Climate Change and Acidification

In its 2017 Strategy, the Science team included a budget of 1.5 million US dollars to support work on climate change and ocean acidification. These funds have been used to support research organizations in the USA, Mexico and Chile.

Common themes addressed by these grants are:

- Assessing oceans impact of climate change,
- Accelerating the development and adoption of climate smart management.
- Building a scientific and technical case for climate change action in oceans, and
- Supporting communities of practice and networks .

The Ocean team reported that one of the key conclusions of the Foundation's climate change and ocean acidification research is that healthy fisheries and those that take ecosystem management into account are likely to be more climate resilient. This is consistent with the ET's findings presented in Q1. Scientific studies consulted by the ET also note climate-related changes of size, behaviors, and geographies of stocks (Gaines et al., 2018).





## OSF Strategies' Integration with the OE Program

The cross-cutting Organizational Effectiveness (OE) program seeks to bring business best practices to the Foundation's teams and grantees. For the Ocean program, OE administers grants to both individual organizations and cohorts. This program has been used consistently across Strategies (see right), and grantees speak appreciatively of this resource. The investment in this program has meant that there is a go-to resource for accessing funds for long-term capacity building and other resources (such as consultant referrals), supporting the "Leadership and Capacity Building" pillar of the Foundation's approaches across all Ocean Strategies.

In Mexico, the Pescadero capacity development program through OE helped grantees sharpen their management, governance, strategic, and fundraising capacities. The program also promoted integration and cooperation among grantees by working with cohorts of grantees from different organizations and by helping them build relationships among their leaders. KIIIs stated that the program also promoted a vision of leadership that promoted collective action and cooperation.



### COHORT PROJECTS

Cohort projects focus on giving longer-term support to multiple organizations or individuals at once, putting them through a common capacity building program. These have included the Pescadero program in Mexico, the Roger Arliner Young (RAY) Fellowship in the US, and Bersama Kelola Alam Adil Lestari (BEKAL) in Indonesia. Such projects have covered (or will soon cover) all Strategies except Japan and Science. Though these grants are administered through OE, no inefficiencies were identified in working with Strategy grantees where applicable



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### ORGANIZATIONAL CAPACITY BUILDING GRANTS

These grants go to specific organizations to address tailored capacity building needs. Grants since 2016 have covered all of the Foundation's focal countries.



## EQ 2.1: INTEGRATION

What have been the high-reward opportunities for integration? Have there been any missed opportunities?



## Coordinating work across teams: High-reward opportunities

The evaluation considers high reward opportunities in view of their potential to produce concrete results for the collaborating teams, balanced against the high demand of collaboration on staff's time. To date, higher-level coordination (aligning strategies, for example) has had higher perceived payoffs vis-a-vis cost than lower-level coordination (i.e. joint grant-making).

Coordination is well-suited to tackling specific, high-value concerns which require the joint capacities and expertise of the different Strategy teams. Examples include:

- Science sub-program and the GSM Strategy collaboration on developing Data Limited Methods (DLM). This approach is now being adopted by other Strategies and by those beyond the Foundation's support (see EQ1.7 for more detail).
- Joint work between the Indonesia and GSM Strategies to develop and test fishery archetype models with the potential to scale up, which could provide valuable lessons and approaches applicable across all Country strategies.
- OE program capacity development support in Mexico and Indonesia, which is coming to China and Chile. OE has proven to be effective in building leadership capacities among grantees (see EQ3.1 for more).

These examples leverage the expertise of the different teams engaged while having the potential to offer value beyond the specific engagements themselves.



## Investing in the future

### Updating and Completing Strategies

Some geographically-focused Strategies were drafted prior to the OSF and Global Strategies, and two cross-cutting strategies (IUU and CC&A) have yet to be finalized. The Strategies are instruments that Foundation teams use to program their activities, as well as an important resource to communicate Foundation priorities to grantees, partners and governments.

### IUU

The Foundation's IUU white paper which provides recommendations for future work. While this evaluation concludes that all Country Strategies engage in activities that contribute to addressing IUU concerns (see EQ2.0), most activities are through grants related to FIPs or market linkages, or through tools for transparency or traceability. A defined IUU Strategy could enable a more cohesive, consistent approach to integrating IUU responses across the other Global and Country Strategies. It could likewise help grantees, governments, and other partners understand better how the Foundation sees its role addressing this highly complex issue.



## Investing in the future: A Strategy for Climate Change and Acidification

### Climate Change and Ocean Acidification

Climate change has emerged as a major factor affecting fisheries and evidence is emerging of preventive actions that can mitigate the negative impacts of CC&A. For example, as indicated in EQ1.0/1.2, most studies conclude that fisheries that are poorly managed and are under stress from overfishing, pollution and other stresses are likely to suffer the most. Current strategies to support healthy sustainable fisheries and ecosystems are likely to contribute to more climate change-resilient fisheries and ecosystems.

Studies also indicate that CC&A is affecting stock size and geographical distribution (see EQ1.0/1.2). Some of the tools and approaches the Foundation currently supports (primarily stock monitoring and catch limits) are relevant to addressing changes in stock size and other behavioral changes of fish stock. With respect to the geographic movement of stocks, it is likely that the the current Foundation will not to make a significant contribution in this area, as it would require much more attention on how transboundary concerns that are likely to affect all fisheries, not just migratory fish.

That stated, 16 KIIIs identified CC&A and its relevance to the ocean as an area where they thought the Foundation was not significantly engaged. As detailed in EQ1.0, climate change is incorporated with activities under the Mexico, US, and Indonesia Strategies currently.



## New Challenges come with new opportunities

While integration can yield important pay-offs, the opportunity costs of collaborative work is typically high given that teams are already heavily burdened. Under these conditions, improved efficiency alone is not a sufficient criteria for collaboration. Strategy Teams seem to find collaboration valuable in at least two instances:

When work leads to outcomes of **higher quality**. Two existing examples are:

- Collaboration of IMS and GSM in the developing market chain archetypes in Indonesia
- Collaboration with OE in strengthening leadership capacity.

When Teams can tackle issues **they alone can not fully address**. The two examples mentioned above (IMS and GSM collaboration and collaboration with OE) meet this criteria also as the different competencies of the teams resulted in the higher quality of outcomes. Examples of potential collaborations that also meet this criteria are two opportunities identified with the US and Mexico strategy teams:

- Addressing transboundary (Mexico/USA) implications of climate change-related species migration and emergent fisheries in the California current,
- Leveling the playing field related to bycatch in seafood imports from Mexico to the US.



Wall at US-Mexico Ocean Border  
Photo Credit: Scripps Media



## EQ 2.2: INTEGRATION

To what extent has the use of the Foundation's voice and brand/profile affected integration?



## The Foundation's voice and profile have promoted integration between donors.

The Foundation has longstanding relationships with key philanthropic organizations such as WFF and Oak Foundation. The Foundation is also an active participant in Oceans 5, an international collaboration between 12 foundations dedicated to protecting the world's oceans by investing in large projects to establish marine reserves and halt overfishing. During interviews, officers from other foundations consistently indicated their participation in these groups bettered their understanding of other funders' granting activities and allowed them to support broader initiatives and to identify opportunities for complementary support. Participation is time-intensive, so positive relations between the Foundation and other donors are key to producing productive outcomes. Stakeholders noted that the Foundation is a well-respected actor in ocean conservation and its participation in collaborative efforts lends them credibility. Foundation POs often serve in leadership roles and have founded or engage actively with funders collaboratives and other similar groups in all focal countries.

The Foundation's voice or profile were not notable factors in grantee integration, which grantees and others attributed more to Foundation investment of time and resources in bringing people together (see EQ 2.3).

"Packard was a partner from the very start. It was a long, expensive effort that took a lot of patience from philanthropic partners, there was litigation and the funders needed to stand up to some controversy. This took eight years. Packard was there all the way through and remain engaged during the implementation phase. There were several other funders too, but Packard's early commitment was really instrumental to the other partners coming in. I don't think I can overstate the importance of that role, having Packard signal something is important by participating; there's no one else in the ocean space who has that same pull."

- Funder KII

Five KIIs specifically attributed donor convening to the Foundation's reputation.





## EQ 2.3: INTEGRATION

How effective have non-grant resources been at improving integration?



## Grantee integration: All Country Strategies invest considerable time and resources in integrating grantee work.

The Foundation has supported workshops to facilitate grantee exchange of lessons learned over the past two years in the US, China, Mexico, Indonesia, and more recently in Chile. Grantees often reported that, prior to these workshops, they had not been aware of the extent of the Foundation's portfolio in their country. Most stakeholders reported that they found these exchanges useful. Integration also sometimes took the form of informal exchange of information or informal coordination through connections the Foundation suggested or made directly.

“The summits are incredibly useful to develop partnering initiatives and projects. Many joint projects have emerged. By promoting the collaboration, the Foundation has enabled better results...Organizations are coming together to do more than what they would be doing on their own. At the national level, the different groups have developed strategies to influence the federal budget of Comisión Nacional de Áreas Naturales Protegidas (CONANP).”

16 KIs thought grantee integration was effective.



## High Reward: Grantee integration to speak with one voice on policy positions.

“Our ability to play defense would never have been possible without grant support from Packard. It has been remarkably effective to bring the ocean community together with one voice and one position to combat rollbacks. There were rollbacks on public land monuments. ...We believe [this forum] was key in preventing marine rollbacks”

“The forum is aligning the position - that was really transformative....That’s why it has been so successful - on our topics, it’s been a loud, clear, consistent, and detailed agreement - the groups drill down.”

Six KIs attributed policy changes to grantee coalitions.

Grantee coalitions, both formal and informal, in the US, Mexico, Indonesia, and for Tuna have opened space for grantees to discuss policy positions and come to mutual agreement a shared position. KIs attribute subsequent policy successes to the fact that these Foundation-funded forums provided a place for grantees to build relationships with their peers, determine a unified message, and to have honest discussions where pre-existing disagreements existed. While these have required investments in time and planning from Foundation staff and grantees to ensure careful coordination, the payoffs have been high.

Other high reward opportunities described in more detail throughout this report are:

- Integration through donor collectives (EQ 2.2)
- Grantee integration through coordination and collaboration (EQ 2.3)



## Unifying grantees around a common approach has been an important, but challenging process.

One of the Country Strategies recently pivoted toward a more intentional integration of its grantee partners' work. The approach increase shared learning and capacity-building to better support the ability of local actors to advocate with one voice, and to create complementarities in programming. The Foundation has supporting joint and/or parallel project workplans incorporating national and international NGOs at local and national scales. While all grantees clearly share the long-term objectives of sustainable fisheries, they do not always agree on strategies. During interviews, the ET found that interest mismatches were the most pronounced between national and international grantees that received parallel funding as part of the same project. By promoting projects that are jointly implemented with parallel grants to national NGO and international NGOs (INGOs), the Foundation is leveling the playing field in partnerships that often used to concentrate decision-making with INGOs. Tensions have also emerged between some re-grantors (both domestic and international) and grantees over administrative procedures and treatment of grantees. In some instances, the tensions have required Foundation staff's proactive management of the relationships among grantees.

### Case Studies



In one case, the Foundation supports two partners to work jointly in the management of a set of fisheries. The national NGO supports fishing with sustainable management while the INGO supports a no-take conservation strategy. The two were initially co-leading a project, but facing a fundamental difference in approaches, resumed working independently.

Photo Credit: Conservation International



One program seeks to provide information on fish stocks and develop catch monitoring methods to be used in the future by a national fisheries governance body. The INGO is pursuing a highly systematic approach that has been reported as providing highly reliable data; the national NGO working much closer to MMAF is likely to be adopted nationally.

Photo Credit: TNC Indonesia Fisheries Program



While the Foundation's time investment in donor coordination has been heavy, the level of effort has been both necessary and valuable.

Funders indicated that they opened grantees' access to resources they could not otherwise provide through donor coordination mechanisms. The Foundation has played an important role in promoting integration and coordination among funders in China, Indonesia, Mexico, US, and increasingly in Chile by investing staff time and Foundation resources. While these investments have not always resulted in joint projects or specific collaborations, they have contributed to an ocean philanthropic sector that is more informed and more willing to engage in joint funding. Donors reported that better communication among donors has also reduced redundancies and identified gaps where there are opportunities for the better use of resources. The cases to the right illustrate examples where donor coordination led to complementary approaches and resulted in a more effective allocation of resources in the ocean sector. In this way, these investments represent important contributions to the long-term Foundation objective of sustainable fisheries. According to key informants, other donors lack the funding, time, or institutional will to coordinate these efforts.

## Case Studies



In Indonesia, donors jointly funded a snapper fishery initiative engaging several international and national NGOs. Each donor funds different project aspects and the group regularly meets to discuss its progress. Through this collaboration, the initiative has benefited from the diverse competencies and resources that each partner brings. For example, while USAID brings a direct official link to the MMAF, the Packard Foundation can support more sensitive aspects such as the public communications about destructive fishing practices.



In Mexico, KILs reported that the Foundation's focus is on MPA and fisheries management rather than on supply chains. The WFF funds market chain-focused work and structures their granting in close communication with the Foundation.

The Foundation also coordinates with Sandler, Marisla, and Wyss Foundations on a long-term program, implemented by Resources Legacy Fund, for coastal conservation.

Photo 1 Credit: OSF Evaluation Team, Fish tagged at iFish-aided processing plant, Bali

Photo 2 Credit: Packard Mexico Marine Strategy

## Integration: Key Takeaways

To what extent are the Foundation's Country and Global Ocean Strategies sufficiently integrated?

- Theories of change for the OSF and Country and Global Strategies are consistent and aligned.
- The vision, outcome areas, key enabling conditions and process assumptions for transformation are, for the most part, consistent across OSF, Country and Global Strategies.
- While a science-focused approach is mainstreamed across the Country Strategies, climate change is not.
- Integration with grantees and other donors is well-managed. That stated, continued integration of this type and quality will require continued heavy investment of Foundation staff time.

## EQ 3: EFFECTIVENESS

To what extent has OSF achieved its objectives (e.g. promote market and supply chain incentives; improve scientific economic and policy knowledge; support policy, regulatory and enforcement reforms; and enhance leadership and capacity) nationally and globally? What has worked or not, and why or why not?



# Market and Supply Chain Incentives: Foundation focal countries have made progress in securing industry commitments toward sustainability, though there is not sufficient evidence yet to say that this is leading to improvements on the water.

**The Foundation has commissioned a separate evaluation, currently underway, to evaluate its GSM Strategy. Consequently, this evaluation did not focus on stakeholders or questions specific to markets, or to grants under the GSM portfolio.**

Japan has shown progress in engaging fisheries and seafood companies in sustainability commitments, as shown by the MEL data on the right. In Mexico, retailer commitments to sustainable seafood are nearing the target.

*“CEA estimates that nearly 280 FIPs have reached Stage 2 since the model was created in 2006, with 155 currently active or completed. The scope of FIP-and MSC-engaged seafood has grown to almost one-quarter of global catch—and nearly 38% if you consider fisheries with good management regimes in place” CEA 2020:40).. “After almost 20 years of implementation, there is not yet a clear narrative around FIP impact on the water. This reflects the complexity of regenerating fisheries, the diversity of governance and market contexts, and the varying approaches for implementing FIPs. That said, the model has been applied to fisheries in the developing world in the last 10-12 years, while most projects currently operating in the developing world have been started in the last five years” (CEA 2020:19).*

\*MEL data shown in this section are illustrative indicators chosen to represent progress relevant to the topics on the slide, and to show both where more and less progress have been made. Data are through January 2020.

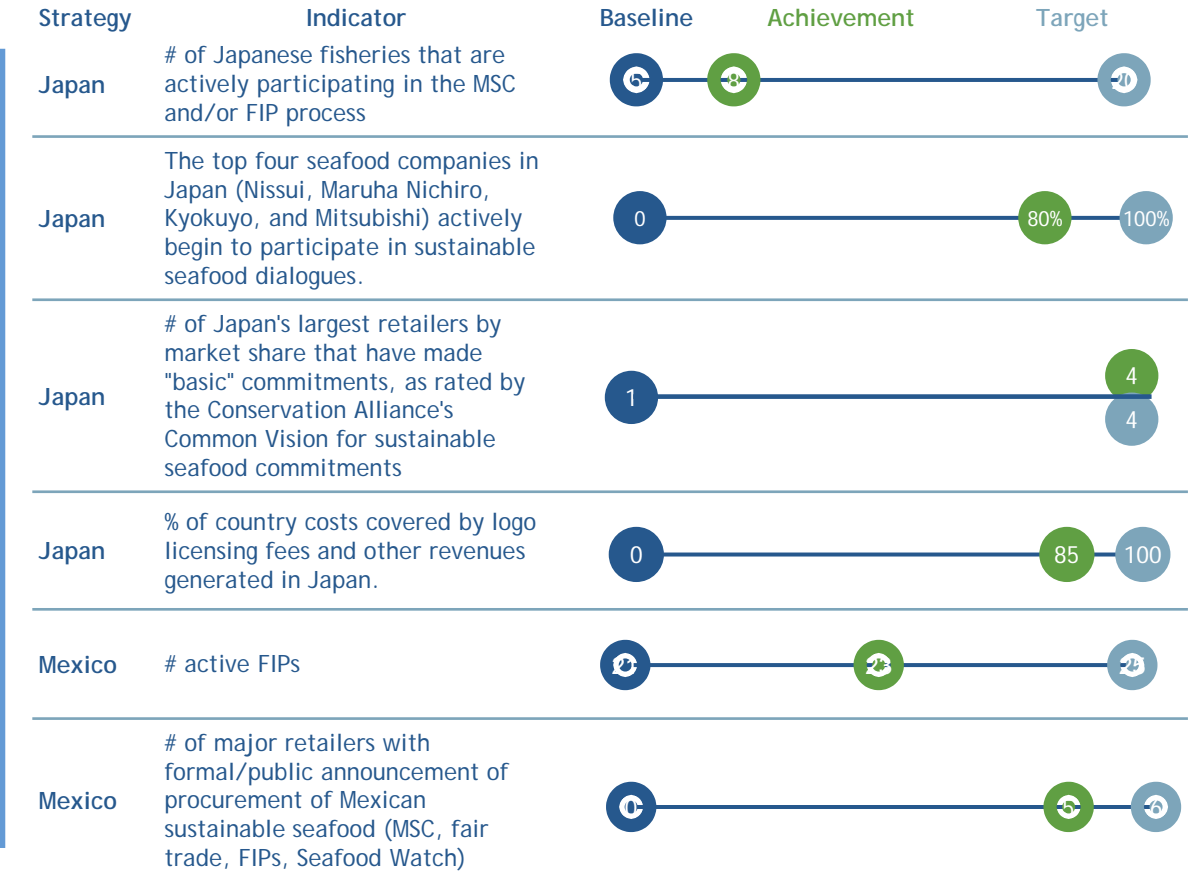


Table 9: Market and Supply Chain Incentive Indicators. Source: Packard Fluxx Data





## Scientific, Economic, and Policy Knowledge: There have been improvements in these knowledge areas especially for fisheries, including making knowledge more publicly available.

The Foundation’s investments in scientific, economic, and policy knowledge have primarily targeted fishery data and management. These include stock assessments, catch monitoring, making data and information available through online portals, and developing best practices such as for Fish Aggregating Devices (FAD). These knowledge products promote good fisheries management and promote traceability and transparency relevant to IUU. Strategy indicators on making knowledge more available also show steady progress; a cross-section is presented to the right.

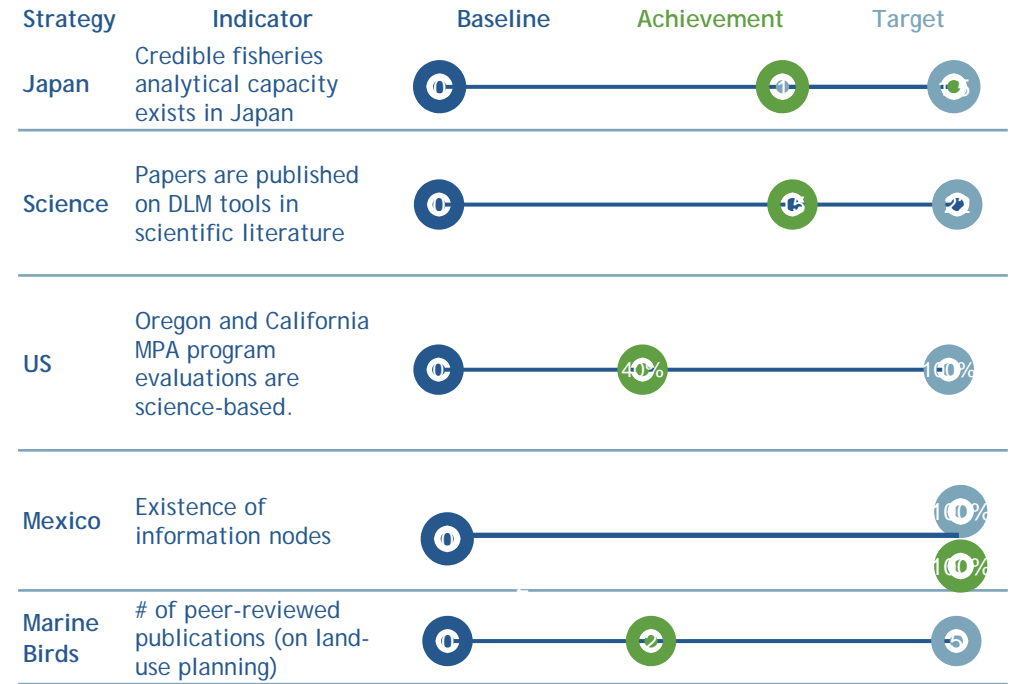


Table 10: Scientific, Economic, and Policy Knowledge Indicators.  
Source: Packard Fluxx Data



Scientific, Economic, and Policy Knowledge: There have been improvements in these knowledge areas especially for fisheries, including making knowledge more publicly available. (Continued)

## Case Studies



The NGO Tuna Forum convenes NGOs on issues where collaboration on generating knowledge would be most impactful. For example, the Forum produced a set of fisheries best practices around FAD endorsed by all its members. Organizations were able to discuss and negotiate within productively-framed conversations around contentious issues. Their unified position supports a clear, single set of scientifically-based guidance for FAD management.

Photo: NGO Tuna Forum

Caveats	Data Category
2 7 5 1	Temporal trend analyses (data time s
2 3 1	Temporal trend analyses (data time s
1 10 5 2	Basic understanding of the fishery
1 7 5 1	Basic understanding of the fishery
1 4 1	Basic understanding of the fishery
	Dispersed information

FishPath has filled a gap in stock assessments for small and artisanal fisheries, which struggle more than large fisheries to acquire data and analysis needed for stock assessments. FishPath is an interface that guides smaller fisheries with a questionnaire to appropriate monitoring and management tools, which smaller fisheries need in order to develop sustainable management practices. One risk is the existence of multiple DLM solutions from different NGOs, which the Foundation is mediating through forums like the DLM Convening held in 2019 (see EQ 1.7).

Photo: FishPath



## Support Policy, Regulations, and Application of the Law: In all the Foundation’s focus countries, there have been successes in policy and regulatory reform.

Country Strategy	Policy Reforms
Chile	Grantee work progressed MPAs including those between Karukinka and Alberto de Agostini, limiting expansion of the salmon industry into Patagonian fjords through rule of law and protecting the Punta de Lobos site through a combination of land acquisition, coastal zoning, fisheries reform, and communication campaigns.
China	Grantees have promoted policy reform through writing recommendations to the State Council, study tours which led to a fishery observers pilot later included in policy, and science-based recommendations currently under consideration.
Mexico	Grantee work has contributed to improved mangrove management policy based on the demonstration of the value of blue carbon and creation of MPAs. Defensa Ambiental del Noroeste (DAN) has supported enforcement through litigation offering legal expertise to government.
Indonesia	In Lampung, grantee work with government led to inclusion of blue swimming crab (BSC) in the regional development plan and a ban on sand mining. Nationally, grantees awareness-raising with government contributed to the protection of certain charismatic shark species for sustainable tourism purposes, and Packard’s support for the IUU Task Force contributed to policy advice, legal opinions, and fishing vessel data to inform regulations on trawling and foreign investment in Indonesia’s capture fisheries industry.
Japan	In 2019, Japan passed a major fisheries reform bill and became a signatory to the International IUU Treaty. KIIs state that the Foundation’s work in awareness raising with government using scientific data was important to these two milestones (EQ3.10).
US	In California, NGOs advocated for updating the Department of Fish and Wildlife’ Master Plan for Marine Fisheries and are partnering on projects to avoid whale entanglement. Nationwide, advocacy and organizing has contributed to preventing policy rollbacks (e.g., offshore drilling)

The Foundation’s work, detailed on the left, has promoted policy and regulatory reform by engaging with the government using scientific and economic data to demonstrate the value of reforms. Indicator data on high-level policy reform has shown the most progress in Japan and the US, as seen in the illustrative sampling of indicators on the next slide. These accomplishments are further discussed in EQ 1.1 and 3.10 respectively; progress in Indonesia is discussed in EQ 3.5. In Mexico and Chile, achievement of the Strategy-level policy goals measured has been slower, though both Strategies have shown incremental progress, and the policy climate in Mexico abruptly became less supportive of environmental policy reform in 2018 (see EQ1.1).

Table 11: Policy, Regulatory, and Enforcement Reform Indicators.  
Source: Packard Fluxx Data



## Support Policy, Regulatory, and Application of the Law: In all the Foundation’s focal countries, there have been successes in policy and regulatory reform. (Continued)

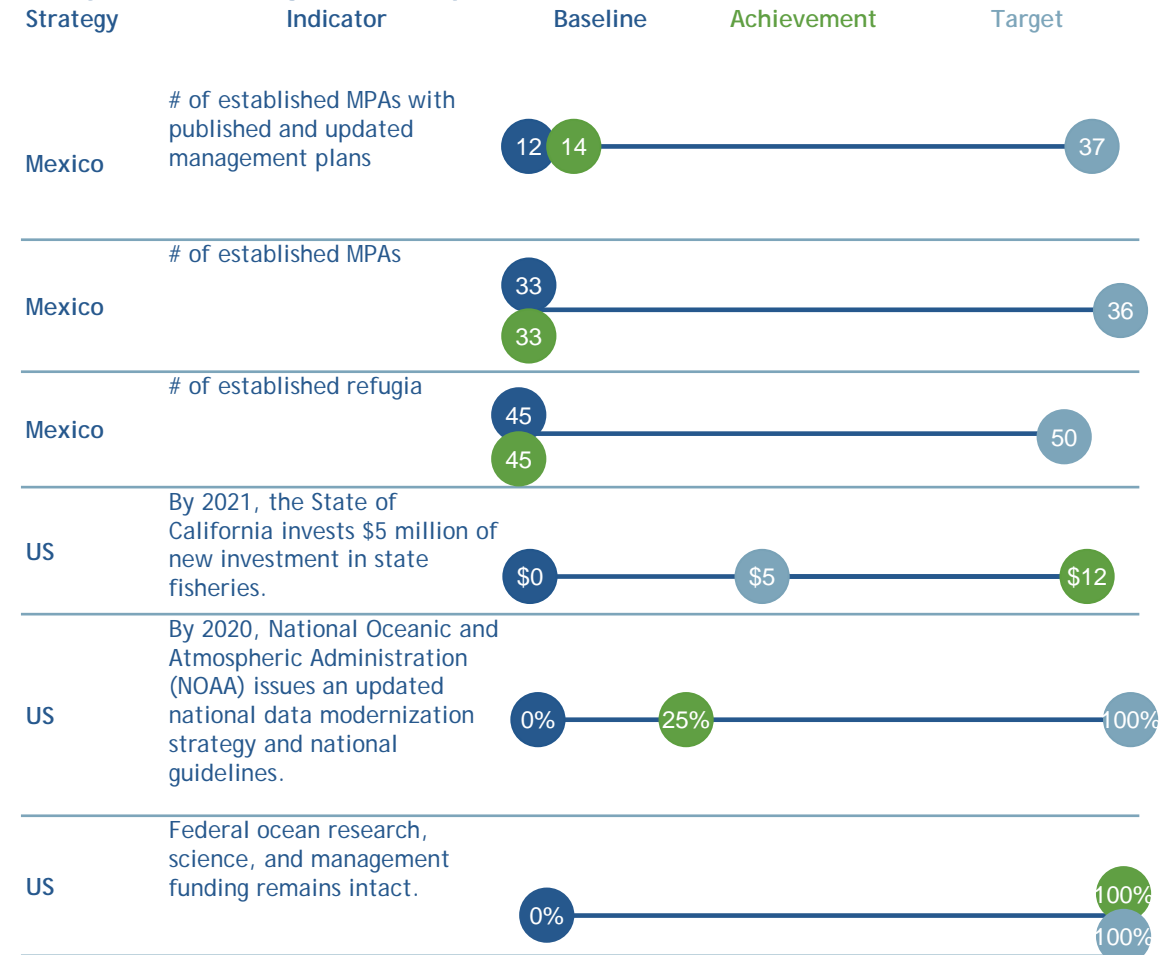
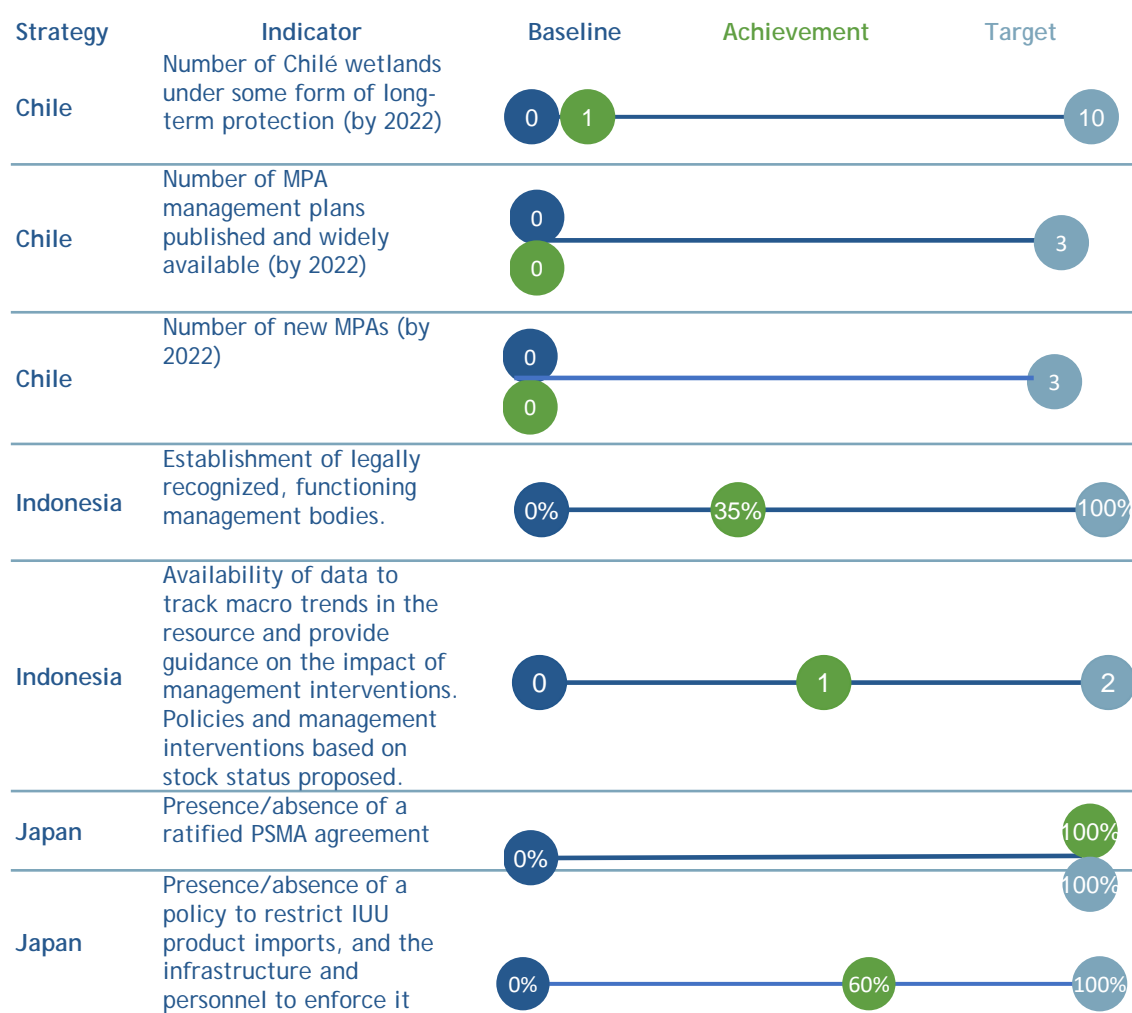


Table 12: Policy, Regulatory, and Enforcement Indicators.  
Source: Packard Fluxx Data



## Support Policy and Regulatory Reforms, and their Application: Application of laws and regulations remain a challenge.

Especially in Indonesia, KIIs stated that though there have been policy improvements, inability to enforce these policies means that IUU is still widespread. Therefore, benefits from policy reform have not yet resulted in stock improvements (20 KIIs; TNC interim report 2019). According to the literature, the driving factors for IUU include the link between illegal fishing and multinational crime, and the unintended burdens that regulations place on legitimate fishers (Chapsos and Hamilton 2019; Chapsos and Malcolm 2017; Satria et al. 2018). KIIs supported these findings, citing reasons driving IUU such as:

- Boat captains are penalized for non-compliance rather than owners, making prosecution of IUU less of a deterrent to boat owners;
- Slow boat licensing procedures leading to bribery, as fishers are continuing to work unlicensed;
- Bribery of coast guard officials when violators are caught;
- Middle men feel social pressure to take all of the fish fishers offer, regardless of its compliance with minimum size and other requirements;
- Vessels from other countries/provinces fish illegally in communities where the Foundation grantees work;
- Lack of resources for continuous monitoring, including the government ending its purchase of real-time satellite imagery and instead relying on Global Fishing Watch data, which is 3 days old.
- Lack of government focus on domestic fisheries management.

Similarly in Mexico, three KIIs stated the government is unable to enforce conservation of MPA space from IUU, especially for totoaba fishing, whose bladders are sold on the Chinese market by criminal cartels , and illegal fishing in US waters in the Gulf of Mexico (see also NOAA 2019 and World Politics Review 2018). Studies also show that unsustainable harvesting, IUU fishing, and an overall lack of regulation enforcement is threatening many fisheries in Mexico (Mangin et al. 2018). DAN in Mexico has been working on monitoring and accountability through legal action, which had numerous success stories but did not fundamentally change the application of environmental regulations.

Five KIIs in China also see the application of regulations as a possible challenge; even as new fisheries laws are passed, the government does not yet have the capacity to enforce them. In June 2017, China published the Vision for Maritime Cooperation under the Belt and Road, which expresses commitment to safeguard marine ecosystems and biodiversity. China is in the process of drafting a new law to address IUU and other maritime fisheries and aquaculture challenges. Consultations on the new law started in August 2019. Major concerns include the large size of the marine fleet, enforcing catch limits; the need to adopt new technology such as GPS, remote cameras, and onboard observers for monitoring; limited data availability; and lack of clarity on fishing rights (Shen and Heino 2014; Su et al. 2020).



## Enhance Leadership and Capacity: The Foundation has successfully focused on identifying and supporting leaders in the US, China, Indonesia, and Japan.

Central to the Foundation’s capacity building model is a focus on champion-building: investing in individuals in whose vision and capabilities the Foundation believes in, and then supporting them with resources and mentorship to grow their organizations. This has been particularly true of organizations the Foundation has seeded in the US, China, Indonesia, and Japan.

In the US, organizations following this model have included the Marine Resource Education Program and the Surfrider Washington Coastal Leadership Academy. These initiatives strengthened leadership within fishing communities to engage with government leaders and built capacity among coastal conservation leaders to advocate for their communities in advisory and advocacy roles.

A key focus of the Indonesia Marine strategy has been building the capacity of local organizations by supporting grantee networks, conscious integration of their workplans with INGOs, funding leadership development programs such as BEKAL, and coordinating OE grants.

In China and Japan, civil society, particularly for environmental issues, is not well-developed and there are few pre-existing partners for the Foundation’s work. In China, this model is exemplified by China Blue, which is widely recognized as being a leader in the emerging civil society. Government officials express great respect for China Blue’s work and professionalism, as do China Blue’s peer NGOs.

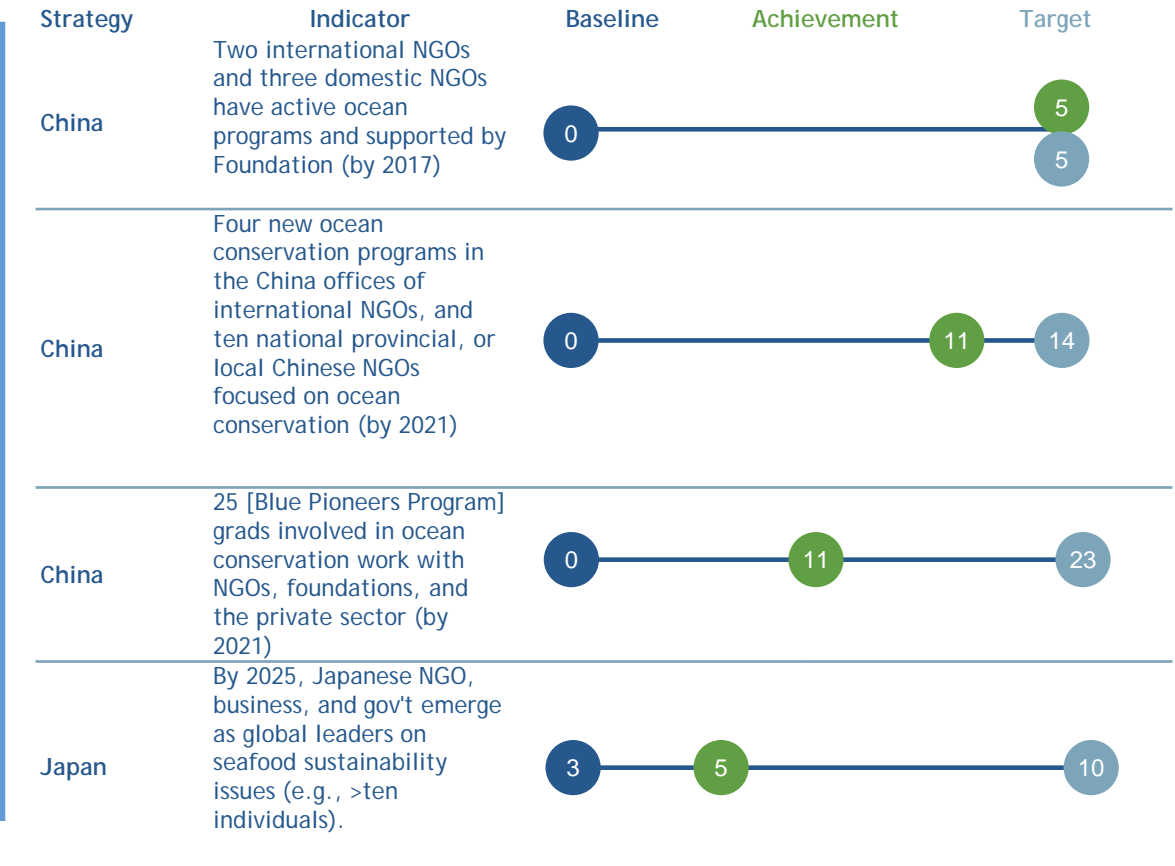


Table 13: Enhancing Leadership and Capacity Indicators.  
Source: Packard Fluxx Data



## Enhance Leadership and Capacity: The Foundation has successfully focused on identifying and supporting leaders in the US, China, Indonesia, and Japan. (Continued)

The China Strategy also includes the Blue Pioneers Program (BPP), which aims to cultivate future leaders in marine conservation through a series of capacity building trainings.

BPP is still determining appropriate approaches for whom to engage, for how long, and through what approach to add the most value; early years have not achieved the stated goal of supplying those working in the NGO sector with the tools they need to grow their organizations (four KIs), as demonstrated by the MEL data on the previous slide. This progress has slowly increased each year, however, indicating gradual improvements in the program.

In Japan, the Foundation has also seeded organizations like Seafood Legacy based on their belief in an individual's capabilities and vision. Seafood Legacy received an OE grant, and the OE program has conducted cohort capacity building workshops with CSOs in Japan. MEL data show that there has been some progress on this toward the 2025 target.



## Enhance Leadership and Capacity: NGO leadership and capacity has increased in Mexico through the Pescadero program and the Foundation's focus on civil society.

The Foundation conducted more formal institution building in Mexico with Pescadero, co-funded by a consortium from 2014 to 2018. KIIs were appreciative of the capacity-building resources it offered, and a program evaluation found that Pescadero had achieved its objectives of building organizational capacity. In keeping with the leader-focused approach, Pescadero utilized a “person-centered approach” that centered on building individual capacities, which participants then took back to their organizations. Nonetheless, Pescadero promoted group actions and collaboration toward common goals among organizations as an important aspect of leadership, contributing to a highly-networked and commonly motivated group of organizations in the Gulf of California. The Foundation is currently developing a similar program for its partners in Chile, in collaboration with three other funders.

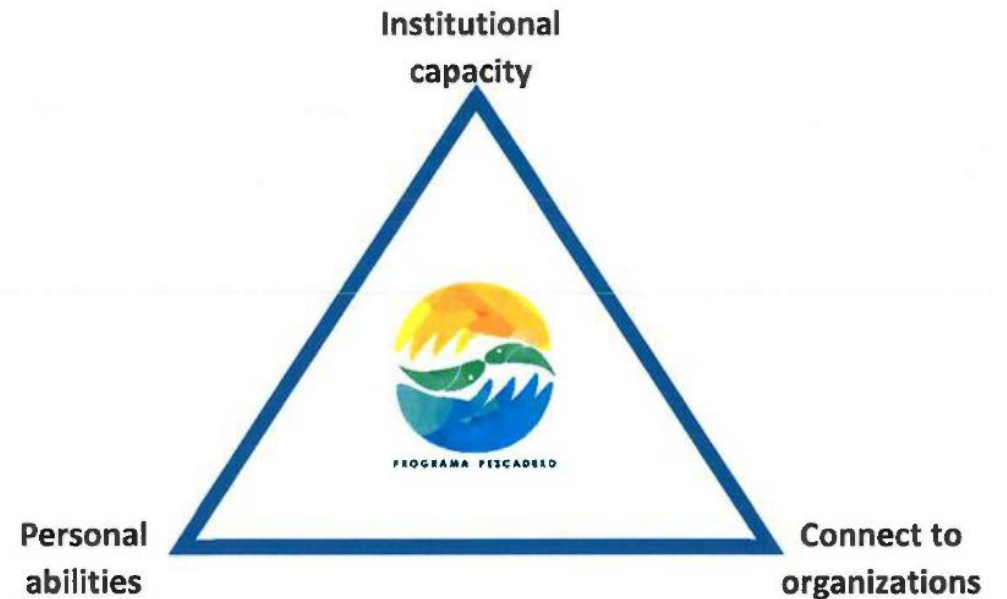


Photo: The capacity building priorities of the Pescadero Program. Taken from the Final Evaluation of the Pescadero Program (FONNOR, FMCN, August 2019).





## The Foundation’s scientific and policy work are contributing toward improving fishery management in most focal countries, though progress toward the global outcome target is incremental.

The Foundation’s generation of scientific and economic knowledge for policy reform is contributing to improved sustainable fishing in specific locations. The link between progress in market commitments and improved fishing practices, however, is not yet clear (EQ 3.0, Markets).

The cross-section of Strategy indicators presented on the next slide represent the change each Strategy measures in sustainable fisheries management. The indicators are not directly comparable — Mexico’s are at a high outcome level and are likely to show change slowly, while the other Strategies measure procedural steps that are likely to happen first. However, the indicators do demonstrate progress is being made toward improved fisheries management in the US, Japan, and Indonesia, as well as under the Marine Birds Strategy and Science sub-strategy. This aligns with findings that changes in scientific and policy knowledge and policy reforms have been successful.

However, the high-level global outcome target —the proportion of seafood sourced from wild capture fisheries with a fishery management index (FMI) score above 0.80— is progressing slowly. This is consistent with the external literature examined in EQ1.0 and 1.2, which found that overfishing and IUU continue to be serious global problems.

Proportion of seafood sourced from wild capture fisheries with sound fisheries management policies/regulations (as indicated by FMI score above 0.80).

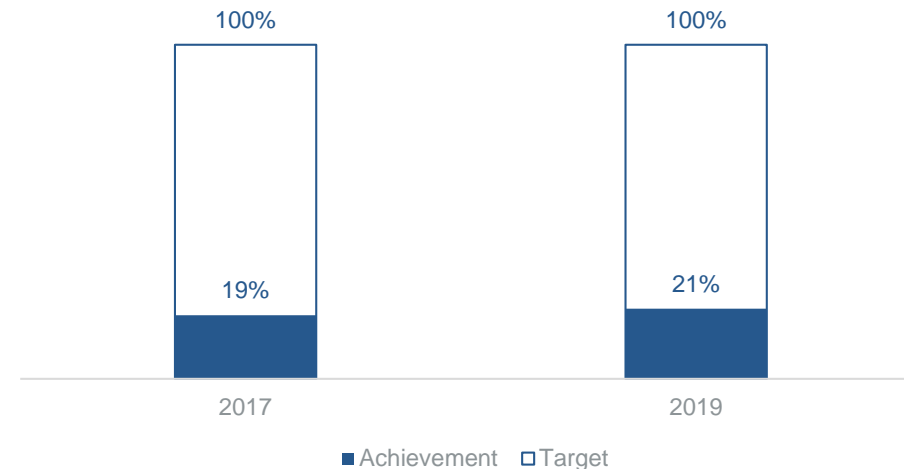


Figure 7: Proportion of Seafood Sourced from Wild Capture Fisheries with Sound Fisheries Management Policies.  
Source: Packard FLUXX Data



## The Science sub-program’s relevant and successful DLM work has focused on gaps other strategies were not covering and/or convening work being done under other Strategies.

### Realized impacts

The promotion of DLM is explicitly tied to the US Marine Strategy. The Science sub-program’s initial 2012 investment with the Marine Stewardship Council (MSC) to develop DLM spawned offshoots by the GSM, US, and former Western Pacific Strategies. The increase in DLM capacity across different Strategy areas succeeded because:

- In focusing on DLM development, the Science sub-program was focusing on a need that was not a perfect fit for a single Strategy, which was deemed relevant, and which other strategies were not focused on.
- After Strategies took up their own grants in this space, the Science sub-program remained engaged with this work and devoted resources to promoting cross-Strategy learning.

### Future impacts yet to be realized

Several parts of the this sub-program’s work - including the research landscape assessment for Indonesia and the mangrove assessments in Mexico—have not yet been linked to grant activities, though both have a strong potential for Foundation staff and grantees to use this information and build the scientific knowledge base. Similarly, the Science sub-program was collaborating with the Indonesia Strategy to develop a capacity building program for scientists in Indonesia, but this was at the design stage and too early to evaluate at the time of data collection for this evaluation.

According to MEL reporting, Science investment in DLM has resulted in 10 grants (against a target of five) from other Strategies funding DLM tools, and 22 published papers on the topic. The grants in question are not explicitly linked to this reporting in the Foundation’s MEL database.

Country Strategy	Collaboration
Chile	-
China	-
Mexico	+
Indonesia	+
Japan	-
US	+
Marine Birds	+
IUU	-
GSM	-
Climate Change	+
<b>Ratio</b>	<b>5/10</b>

Table 14: Science sub-program Collaboration with Country Strategies



# The Foundation's scientific and policy work are contributing toward improving fishery management in most focal countries, though progress toward the global outcome target is incremental. (Continued)

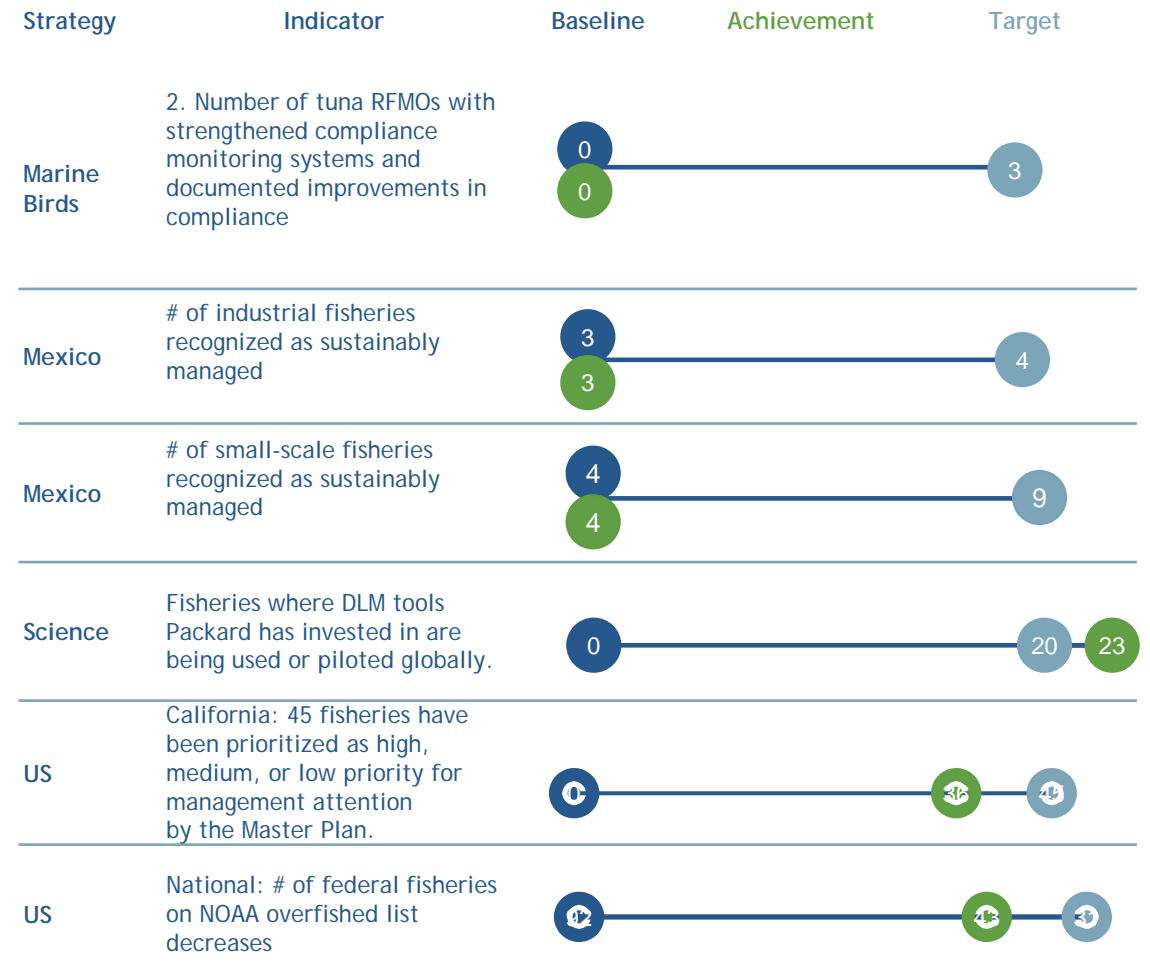
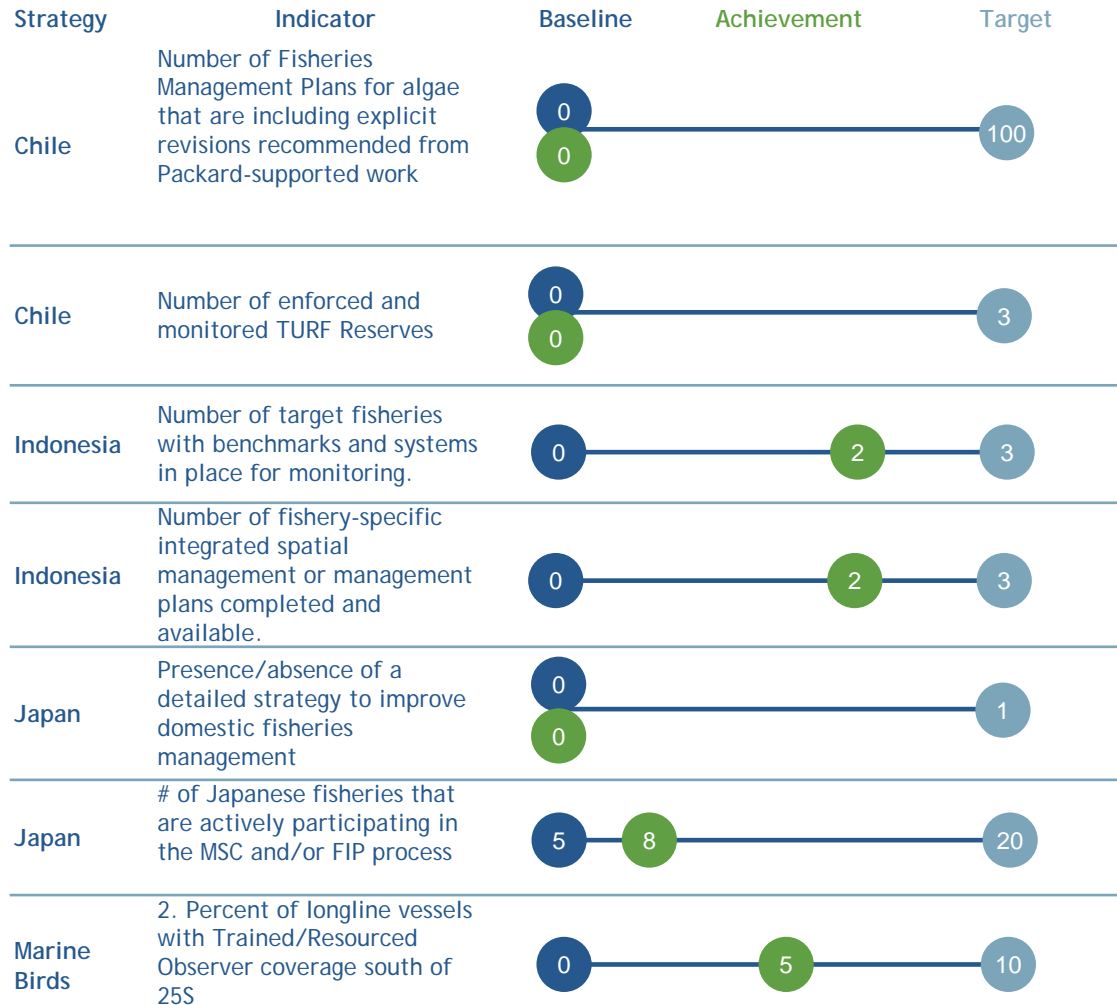


Table 15: Improved Fisheries Management Indicators. Source: Packard Fluxx Data



## The Foundation has approached aquaculture as a crucial, but farther-off focal area and has not yet been an area of heavy investment by the Ocean team.

The only Strategy with an explicit aquaculture indicator is Mexico, where reporting indicates that the development of an aquaculture TOC and approach was paused, but is now again underway through grantees. Reporting on the global OSF indicators suggests that changes in responsible aquaculture management are not yet being systematically measured and that there do not appear to be major recent changes in focal country aquaculture policy.

FOOTNOTE: The progress reporting for Mexico is based on PO estimates of progress and is not quantitatively benchmarked, but the overall assessment of 20 percent is in keeping with the ET's assessment of progress based on the qualitative reporting and is in line with the finding that progress developing aquaculture programming has not yet been focused on.

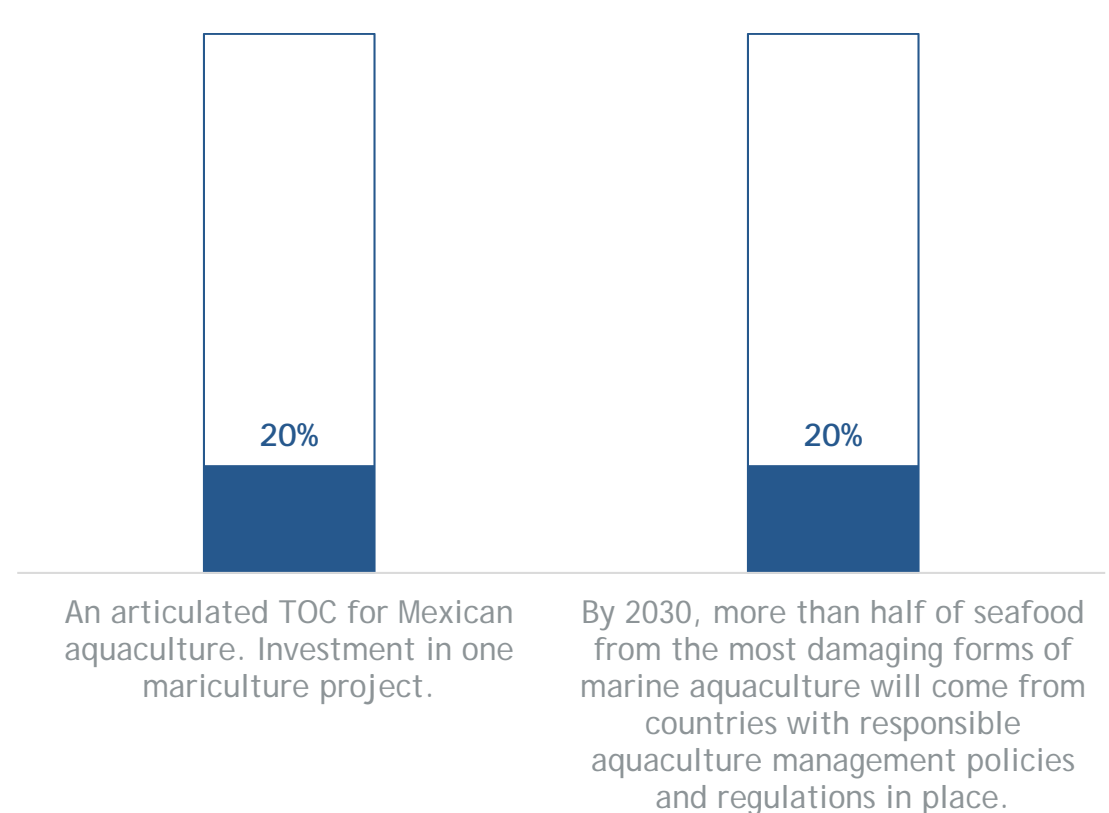


Figure 8: Progress Toward Mexico's Aquaculture Objective. Source: Packard FLUXX Data



## Biodiversity protection in the Foundation’s focal countries has been slow to increase the number of protected areas, which should be expected.

The Foundation supports work toward increasing biodiversity protection through policy and regulatory reform, scientific and economic knowledge, and building the capacity of organizations working on these issues.

The Foundation is measuring its progress in increasing biodiversity protection in Mexico and Chile and its success in preserving existing biodiversity protection in the US. These three countries have also already met the Aichi Target 11 standards indicated in the OSF-level biodiversity indicator, so additional progress in these three countries is not captured at the OSF level. While Chile and Mexico have met their Aichi targets of maritime area under protection, much less progress has been achieved in the management of MPAs, as the budgets allocated for that purpose are very small.

% of OSF focal countries that have reached the Aichi Target 11 of protecting at least 10% of their marine area.

% of OSF focal countries that have reached the Aichi Target 11 of protecting at least 10% of their coastal area as marine reserve.

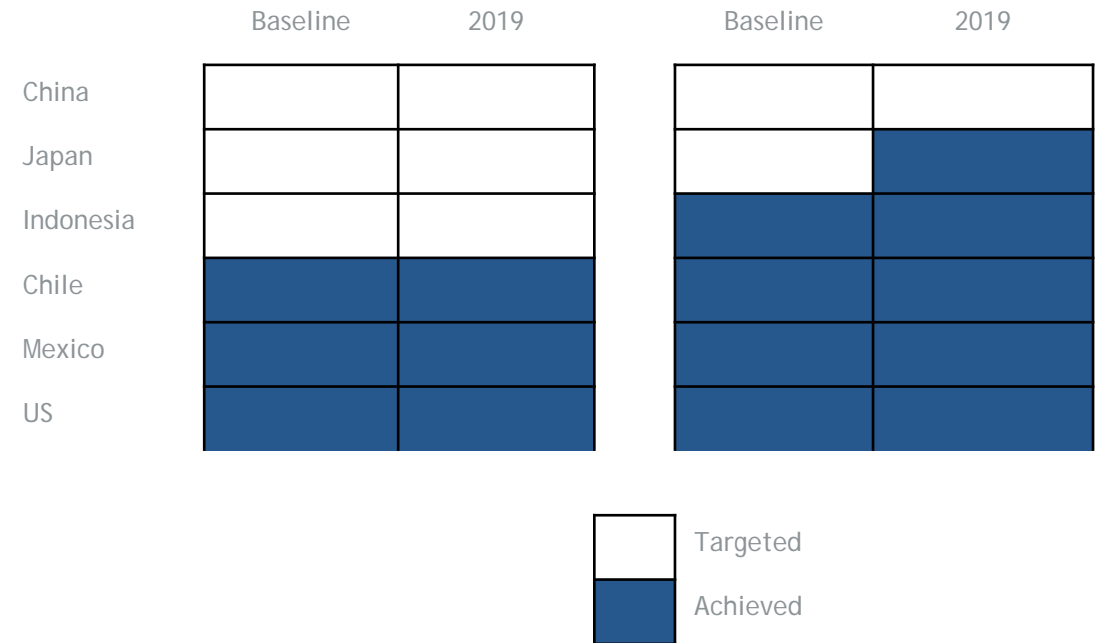


Figure 9: Progress Toward Biodiversity Protection. Source: Packard FLUXX Data



# Biodiversity protection in the Foundation’s focal countries has been slow to increase the number of protected areas, which should be expected. (Continued)

Except for the US defense indicators, the outcome-level (establishing new protections) results have not yet been met. Other indicators toward these higher-level results show progress toward improved management of existing MPAs and incremental progress toward getting new MPAs approved. Though some of these indicators allow for subjective assessment of progress made, they are backed by qualitative reporting that demonstrates the extent to which change has occurred.

The China, Japan, and Indonesia Strategies do not focus on biodiversity protection, and so do not have Strategy-level indicators. There is no clear link between Japan’s increase in coastal area protection and Foundation programming.

Strategy-Level Biodiversity Protection Indicators

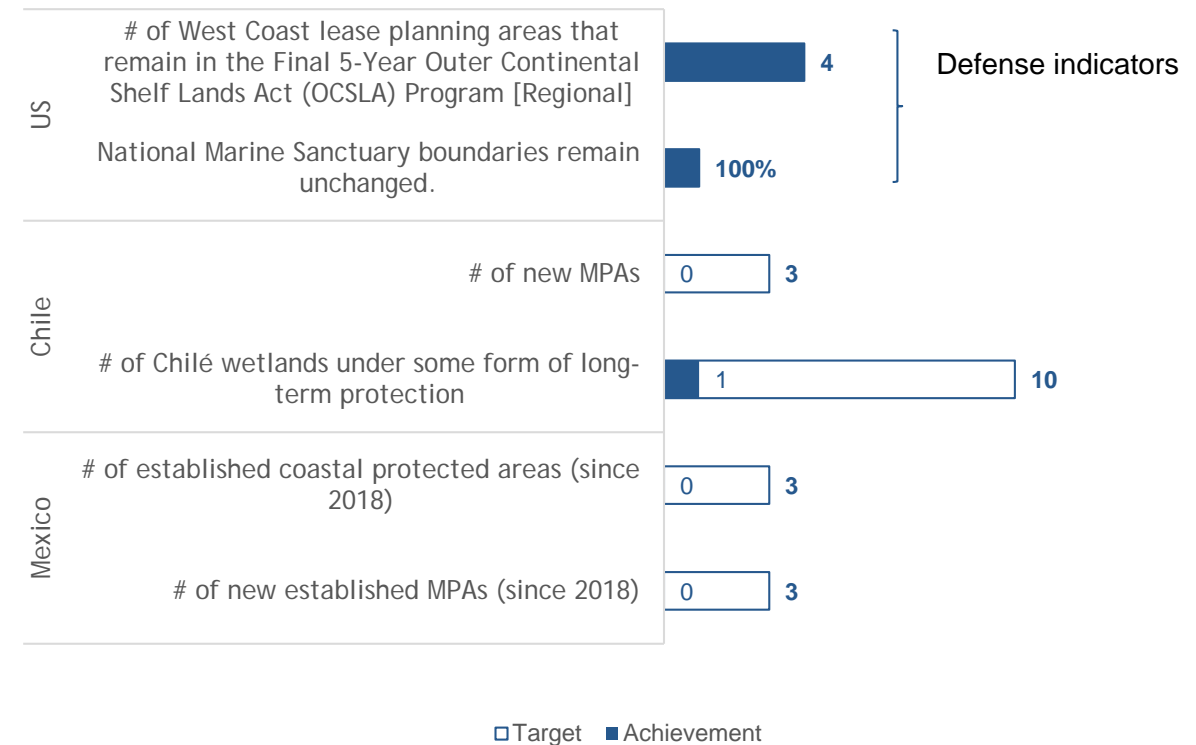


Figure 10: Strategy-Level Progress toward Biodiversity Protection Indicators. Source: Packard FLUXX Data

A person's hands are shown holding a piece of wood with a hole. The image is overlaid with a blue filter and decorative wave patterns at the bottom. The text is centered over the wood.

## EQ 3.1: EFFECTIVENESS

What model/structure (implementation modality) works best?

## Effective strategies included:



Cultivating relationships between scientists, CSOs, and government officials (China, Indonesia Mexico, USA, Japan)



Integrated approaches working at multiple levels (all countries)



Long term flexible grants that allowed grantees to build capacity, retain qualified staff, and make long term commitments (Indonesia, Mexico, US)



Reaching new stakeholders (GSM, IUU, Japan, USA, Indonesia)



Networks to exchange information, identify opportunities for collaboration, and mobilize political support (USA, Indonesia, Mexico, Japan)



Use of scientific evidence to support policy reforms and litigation (all countries)




Capacity building approaches and integration with OE (all countries)



Use of PF reputation and voice to draw attention and resources to specific regions and issues (all countries)





## Effective strategies included:


 Cultivating relationships between scientists, CSOs, and government officials (China, Mexico, USA, Japan)


 **Integrated approaches** working at multiple levels (all countries)


 **Long term flexible grants** that allowed grantees to build capacity, retain qualified staff, and make long term commitments (Indonesia, Mexico, US)

 **Reaching new stakeholders** (GSM, IUU, Japan, USA, Indonesia)

 Networks to exchange information, identify opportunities for collaboration, and mobilize political support (USA, Indonesia, Mexico, Japan)

 **Use of scientific evidence** to support policy reforms and litigation (all countries)

 **Capacity building approaches** and integration with OE (all countries)

 **Use of PF reputation and voice** to draw attention and resources to specific regions and issues (all countries)

Those in the green box were characterized as the most influential in effecting change according to KIIs and desk review, which the following slides will explore.



Leadership and capacity building has been a critical model in the US, China, Indonesia, Japan, and Mexico.



### IDENTIFYING LEADERS

The Foundation’s model is to identify specific leaders and allow them to build institutions around them through mentoring and resource provision. They have done this in China with China Blue, in Japan with the government and NGOs, and in the US with seeding startup NGOs such as Monterrey Bay Fisheries Trust. This is an effective strategy where civil society is either generally not strong or not yet strong on the Foundation’s priority issues.



### INSTITUTIONAL CAPACITY BUILDING PROGRAMS

The Foundation conducted institutional capacity building through the Pescadero program in Mexico (see EQ 3.0). This enabled grantees to improve administrative and managerial leadership abilities, organizational capacities and impact, communication and trust between CSO actors, and operationalization of best practices (Pescadero Final Evaluation 2019). Similarly, United in Diversity in Indonesia is conducting leadership-based organizational capacity building.



### CROSS-CUTTING OE GRANTS

The Foundation offers opportunities for organizations to build institutional capacity through Organizational Effectiveness grants, which seven KIs spoke appreciatively about. These range widely and include supporting a strategic plan process, accessing professional coaching, and hiring surge staff. The Foundation has awarded 66 OE grants to Ocean partners since 2016. These grants supplement the Foundation’s mentoring and programmatic grants, enabling organizations to access tailored, targeted support.



### ENTRY POINT

In countries where there is resistance or a narrowing space for international NGOs--China, Indonesia, Japan, and Mexico—capacity building of local organizations has been or has the potential to be an alternate entry point for Packard’s work.



## Long-term, flexible grants have been important in optimizing grantee effectiveness.

### LONG-TERM PARTNERSHIPS

The Foundation's long-term partnerships with grantees are valuable because much of grantees' work is long-term (capacity building, advocacy, awareness-raising, market shifts), so grantees can be confident that they will be able to continue their work over a long period (11 KIIIs).

### CORE FUNDING

Core funding enables grantees to respond to changing political circumstances rather than be locked into an approach from their proposal. Core funding also enables grantees access to grants from other foundations (often local foundations) that don't necessarily cover staff salaries (seven KIIIs). These models are rare (Wellner 2005) and distinguish the Foundation from its peers.

### TRADEOFFS

Because partnerships with specific organizations are often long-term, Foundation funding must also be dedicated to these specific partners. Therefore, the Foundation has less flexibility to respond to emerging issues (two KIIIs), though in urgent cases, such as the Federal Response, the Foundation has shown itself able to quickly and flexibly mobilize funds toward new partners and priorities.

### ROLE OF RE-GRANTERS

The Foundation conducts some grant-making through re-granters. In China, this is necessitated because of legal limitations on foreign organizations. However, while Packard's granting style is characterized by collaboration and capacity-building, re-granters in China have so far taken a top-down, deliverable-focused approach which has caused tensions with grantees and resulted in additional overhead (seven KIIIs). Respondents suggested that the Foundation more closely mentor these re-granters.



## Working at the policy level with key stakeholders using scientific evidence has been key to making change with the potential for widespread effects.

Successful methods for engaging governments have included using science to demonstrate the validity of proposed policies, investing substantial staff time in cultivating key government relationships, and building specific data or policy analysis skills in government officials. In particular, cultivating relationships takes time, but means that research is more likely to be considered and grantees' voices are more likely to be heard.

The relationship aspect of this finding is important; science often fails to influence policy unless key stakeholders are a part of the process. In Mexico and Indonesia, work with fisher communities and MPAs involved building close relationships.

"A lot more of my time goes to government relationship. ...At the end of the day the final product is really not that different [but] working with the government makes it a lot more impactful. We have a lot of government support behind it."

"We would like to affect policy, but [researchers] have made it clear that the research cooperation is based on science....We made it clear that we'd like to use the science to influence fisher management outcome. The reform is closely related."

"We used how much money the province earns from blue swimming crab...to influence the marine special planning process to ban sea sand mining....Using this calculation they convinced the government that crab is more profitable than sand mining."

22 KIIs identified government engagement as a key reason for success.



Taking a multifaceted approach to affecting change at multiple levels was effective, though not all forms of Strategy integration were visible.

The Foundation has addressed the problem of marine conservation through the lens five different enabling conditions (Hypothesis 3) and at different levels within these conditions, successes reinforce each other, making the Strategies more effective. In addition to the five enabling conditions, the integrated approach includes support for financing, as outlined in EQ 1.3. This is discussed in more depth in EQ 1.0 and EQ 5.0.

The OSF ET was not able to ascertain varied levels of coordination between Strategies. Integration is not fully documented and takes place in both formal and informal ways. It is difficult to assess the extent to which Foundation-supported activities contributed to policy and regulatory reforms.

A person's hands are shown holding a piece of coral. The image is overlaid with a semi-transparent blue filter. At the bottom of the image, there is a decorative graphic of stylized waves and bubbles in a lighter blue color. The text is centered on the image.

## EQ 3.2: EFFECTIVENESS

To what extent has the Foundation's non-grant investments been effective?



## Non-grant support helps grantees refine strategies and broaden networks, enhancing their effectiveness.

### **Mentoring and Advice**

Foundation staff have productive strategic or tactical discussions with grantees, giving them advice and information that they perceive as useful. Comments highlighted how knowledgeable stakeholders perceive Foundation staff to be, and that grantees have a high degree of respect for the Foundation's high-level perspective. Such advice helps grantees adjust to changing or unexpected circumstances, such as Foundation staff discussing grantees and other stakeholders' responses to unrest in Chile.

### **Connections and Networks**

Throughout the Marine Strategies, the Foundation provides both formal and informal connections between grantees and other relevant stakeholders. KIs were appreciative of formal meetings that brought grantees together, stating that such meetings offered an opportunity to share knowledge, learn from each other, and opened the doors to collaboration. Less formal introductions among grantees were also valuable. Grantees also reported that, in lieu of grantee meetings, they had a poor understanding of Packard's broader programming in their operating countries, and regular dissemination of grantee products/initiatives would be helpful for collaboration (nine KIs).

Most KIs found it difficult to give concrete examples because these forms of advice tended to happen many times over long periods, so specific instances did not stand out. They agreed, however, on the value that such advice and connections conferred.

“Things come up as you do your work that affect it greatly. Figuring out a way to overcome that is important. [When there's unrest, we discuss]: what are you hearing and what are you seeing? How does that affect next steps from government to the ground? How can we execute what we've set out to do, and what are other organizations doing? So, it's that lens of seeing what other organizations are doing in the space and coming to similar resolutions when there are these unexpected, tectonic shifts.”

“Packard will connect you with scientific, policy experts that they know will help inform your work. That is very unique. It's not just grant support or their reputation, it's their ability to connect what they're doing on science and policy and connect their grantees together. Things are changing, subject matter evolving, so it's valuable to have someone in the foundation arena doing this rather than expecting that you're going to find your way to latest information.”

13 KIs stated that Foundation staff advice or discussions were important to grant success.



## Donor coordination has been an effective aspect of non-grant investment in making grants more efficient and targeted.

The Foundation has invested time and money into donor collaboratives in all focal countries. Participants in these collaboratives saw them as enhancing coordination and decreasing program redundancy (or described their potential to do so). Prominent examples include the Foundation's coordination with the WFF to fund the same organizations for complementary purposes in Japan, and the memorandum of understanding (MOU) with USAID/Indonesia to support snapper fisheries and leverage both USAID's access to government and the Foundation's granting flexibility (see also EQ 2.2, 2.3, 2.4, and 2.5 for more case studies and details).

"Having everyone aligned on the direction they should be going and collaborating on what they're advising the ministry on is a pretty significant win, I think. It's also a pretty limited pool of grantees that have the experience to do the work. Given that, it's much more productive and useful to coordinate on what we fund and which organizations are going to pick up gaps....Instead of people competing for the funds, [Packard] and I had ...talked with the ministry about the priorities."

"Lack of cooperation [co-granting], but there is opportunity for different funders and donors to share information and learn what's happening....The funders are working on different focal areas that's why its difficult to have concrete cooperation....Different themes and geographic area."

Four KIs linked investments in donor coordination with better coordination.



The background of the slide features a blue-tinted photograph of a person's hands holding a fish. The fish is held horizontally, with its head to the right and tail to the left. The person's hands are visible, with fingers gripping the fish. The overall image has a soft, slightly blurred quality. At the bottom of the slide, there is a decorative graphic consisting of stylized, white, swirling wave patterns that resemble ocean waves or a decorative border. The text is overlaid on the central part of the image.

## EQ 3.3: EFFECTIVENESS

To what extent has the use of the Foundation's voice and brand/profile affected achievement of objectives?



## The Foundation has drawn attention to specific regions and issues, thereby drawing more resources and effort toward achieving related objectives.

Because of the Foundation's reputation as a leader in marine conservation, other donors paid more attention to issues that the Foundation prioritized, including work in specific regions (e.g. the Gulf of California and China), establishing California's MPA Network, and drawing attention to IUU.

Grantees noted that having a grant from the Foundation allowed them to attract additional funding and/or access to the stakeholders or networks they needed to be effective.

"One of the big things is that if Packard makes something a priority, it's likely to happen. If you look at the Marine Life Protection Act, Packard made that a priority and because of their ability to fund that work, but without their work on it I don't think it would have happened. When they support something, it brings a lot more magnetism and pull and support for that issue."

"The fact that Packard contributes often makes it easier to secure funds from other philanthropy because they are so well-respected, so if they contribute, their peers sit up and take notice....There's also the fact Packard is well-respected, so their interest in an issue helps elevate it in the policy space and with other funders. There's a specific value in the expertise of Packard staff on certain issues."

11 KIIs linked the Foundation's reputation and voice to engaging other donors.



The Foundation has appropriately kept a lower profile where local political environment necessitates.

In some countries, the Foundation's profile as a foreign donor poses potential risks. The Foundation has effectively dealt with this by:



Using in-country advisors in Indonesia and Japan to ensure local presence and culturally appropriate communication (Indonesia will also have one in 2020).



Working through local re-granters and NGOs in China to comply with burdensome government regulations.



Keeping close tabs on the political environment in all focal countries, and pivoting strategy as needed to react to changes in circumstances.



## Role of Communication in Ocean Programming

The Foundation's support for strategic communications includes grants to Communications, Inc. for non-branded strategic communications which included the development and communication of information and priorities pertaining to oceans in major international forums. The Foundation also supports TheGuardian.org for branded journalism on ocean conservation and to country-specific organizations for media coverage around ocean conservation. Strategic communications have the potential to promote public awareness or reframing of ocean conservation issues and guide public support toward pro-ocean policies (Drummond et al., 2018). TheGuardian.org is tracking engagement with its pieces, though changing public opinion and resultant policies is likely to be a slow process. The Foundation also supported the production of the Coastal Governance Index Outreach by The Economist Intelligence Unit as well as the report Our Shared Seas by CEA in 2016, which is an authoritative report on Oceans and was updated in 2019. The Foundation's support for public opinion polling on Ocean issues through Kantar Public, which conducted a first round of polling in 2019, will help the Foundation assess changes in public opinion over time. Though communications has become an increasingly important component of the Foundation's work, its role has not been explicitly reflected in the OSF Theory of Change.

## Effectiveness: Key Takeaways

To what extent has OSF achieved its objectives (e.g. promote market and supply chain incentives; improve scientific economic and policy knowledge; support policy, regulatory and enforcement reforms; and enhance leadership and capacity) nationally and globally? What has worked or not, and why or why not?

- Foundation focal countries have made progress in securing industry commitments toward sustainability, though there is not sufficient evidence yet to say that this is leading to improvements on the water.
- There have been cross-cutting successes among all Strategies in advancing scientific and economic knowledge, policy reform, and capacity building and leadership.
- Application of the law and regulations remains a major challenge.
- Non-grant investments such as staff time in grantee mentoring, grantee network-building, and donor coordination, supported by the Foundation's reputation, have positively contributed to the Foundation's objectives.
- Progress toward the three major OSF global goals—sustainable fishing, aquaculture, and biodiversity protection—has nonetheless been slow.



## EQ 4: EQUITY

**In what ways is OSF advancing (or not advancing) equity, particularly in program design and beneficiary impact?**



## The Foundation’s Conservation and Science (C&S) Program, which includes the Ocean Team, has begun to develop a Diversity, Equity, and Inclusion (DEI) approach, but this effort is still underway.

The work has included developing a vision statement with the following key elements:

### DIVERSITY

Actively engage with the diverse identities and perspectives of the regions and communities in which we work and of the issues we address;

### OPENMINDEDNESS

Exhibit a deep cultural understanding and willingness to learn;

### RESPECT

Demonstrate thoughtful, inclusive, and respectful language and actions;

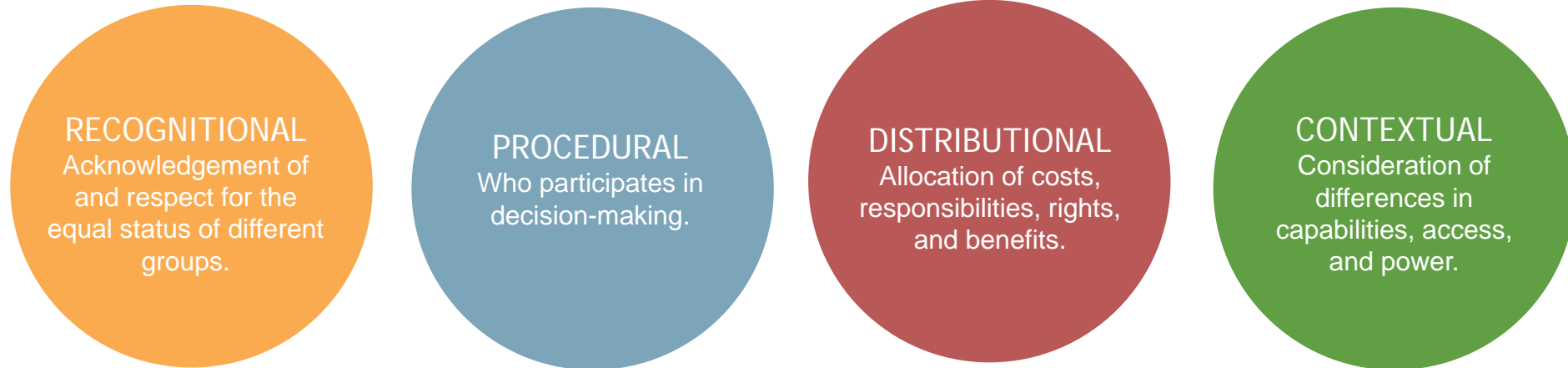
### INCLUSION

Include, learn from, and celebrate different voices, perspectives, and knowledge.

During fieldwork, this internal initiative was under development, so there has not been full opportunity for Programs and Strategies to fully incorporate equity into ongoing operations. Internal work to date has included an assessment of opportunities from Policy Link, a DEI 101 resource from CEA, and an internal working group. Nonetheless, some of the OSF Strategies have begun to incorporate and explore equity into programming. One limitation in this section was that the ET conducted fieldwork only in Indonesia and China, so relatively few communities and ground-level beneficiaries—especially from other strategies—were interviewed for this evaluation. This section explores what has been done so far, what grantees have done, and areas for continued growth.

Throughout **this section**, the evaluation refers to “diverse groups,” which may include people of color, women, youth, indigenous people, socioeconomically disadvantaged groups, and others. When the evaluation refers to “communities” or “community groups,” this refers generally to the people living in the area affected by the intervention.

# Framework for thinking about Equity



In responding to interview questions about the role of equity in their work, respondents most frequently said that they were not explicitly considering equity, and that they had not thought about the intersection between equity and their work. Of those that were considering equity, distributional (who benefits) and procedural (who participates in decision-making) were the most common lenses through which respondents thought about equity.

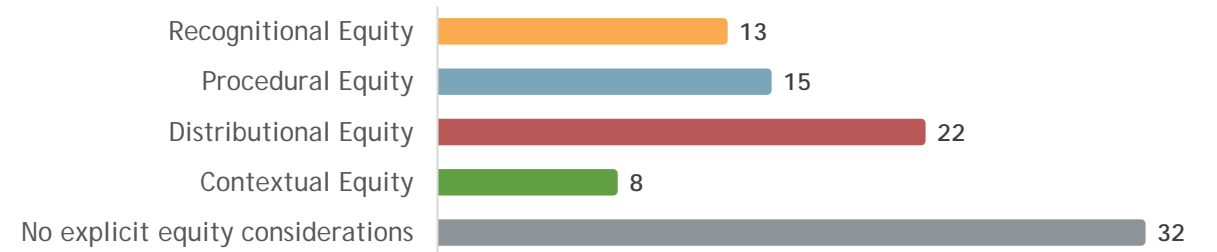


Figure 11: # of Respondents Considering Type of Equity in their Work

FOOTNOTE: Friedman et al. 2018.; Maharjan 2011; Meerow et al. 2018. This framework is commonly used in dialogue about equity, including equity in conservation.



## Recent Foundation shifts toward explicitly recognizing how its work intersects with diversity, equity, and inclusion has promoted recognitional equity within the Ocean Team, though this work is still nascent.

### POSITIVE PROGRESS

In line with current trends in philanthropy (e.g. Olivarez 2019), the Foundation has begun to articulate how diversity, equity, and inclusion (DEI) relate to its work. Interviews with Ocean Team staff revealed support for this move.

The US Marine Strategy has incorporated human-centered outcomes and indicators related to diversity in its grantmaking, recognizing the need to explicitly acknowledge diverse groups and the value diversity adds. Recent grants have included groups such as the Hispanic Access Foundation to promote the ocean conservation movement among Hispanic communities and the Ray Fellowship, an environmental leadership program to increase racial diversity in environmental NGOs.

Several grantees stated that their organizations had already developed and mainstreamed DEI policies.

### OPPORTUNITIES FOR GROWTH

Because of the stage at which the Foundation currently is in its development of an approach to DEI, equity values are not yet mainstreamed throughout official OSF documents beyond the C&S DEI Vision.

The most common response to questions about equity during fieldwork was that grantees have not explicitly incorporated equity into their work with the Foundation, typically because they had not been thinking about the equity implications of their work (32 KIIs). This is supported by the ET's desk review; coding grants, about half mention underrepresented groups, and about one-third promote recognition of underrepresented groups. In KIIs, such grantees expressed interest in better understanding the Foundation's approach to equity.

Grant coding\* indicates that nearly half of grant reports or proposals recognize diverse groups by at least mentioning such groups, and about a third promote recognition of such groups externally (often with government bodies). (n=41)

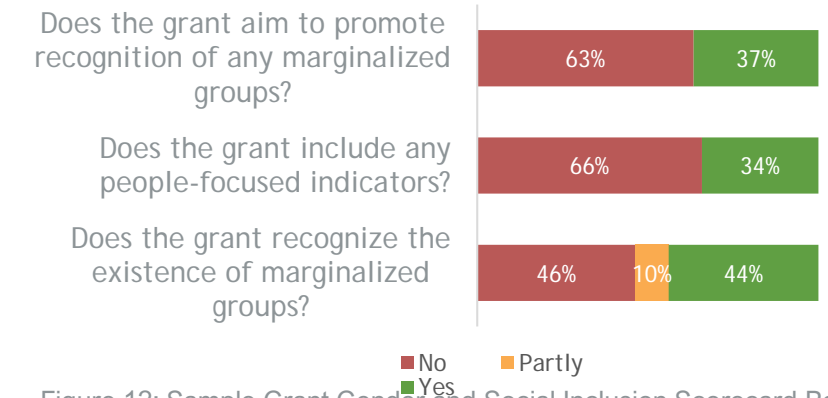


Figure 12: Sample Grant Gender and Social Inclusion Scorecard Results. Source: Social Impact Grant Review

\*The ET coded 41 grant proposals or reports, spread evenly between global and country strategies and chosen to represent larger grants, using a version of Social Impact's gender and social inclusion scorecard updated for this evaluation (see Annex). The specific questions from the scorecard are indicated on the graphs on each slide.

## Some grantees promote procedural equity through engaging underrepresented groups in program design or on staff, though this is not necessarily true at the Foundation level.

### POSITIVE PROGRESS

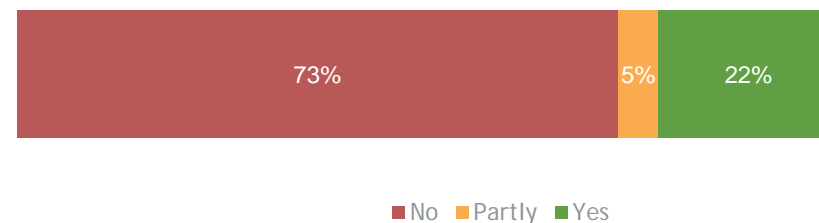
Grantees reported engaging underrepresented groups in design process and/or having staff and board representation of ethnic, gender, and generational diversity (15 KIs). Grantees report that procedural equity approaches have improved community buy-in to interventions, though the effect of increasing diversity in some grantee management was difficult for grantees to articulate and it may be too soon to see effects. Grantees reporting such engagement included both grantees whose activities were explicitly community-focused, and those with more research or policy focus (such as seeking to increase representation of women scientists or scientists of color in a group). External literature does demonstrate that more diversity in decision-making leads to better quality decisions (e.g. Hunt et al., 2018, Jackson et al., 1995).

### OPPORTUNITIES FOR GROWTH

The Foundation's science-driven approach to framework design does not prominently include consultation with diverse groups. In some cases, the science-based priorities may differ from priorities that emerge from underrepresented voices. For example, one grantee identified plastics pollution and coastal access as issues important to local organizations in the US, which are not aligned with Foundation priorities. Consultation without incorporation of feedback raises the risk of tokenism.

In China, three KIs identified barriers to procedural equity approaches that included male-dominated foundations and government preference for academic rather than community input. This is in line with external literature on centralized decision-making in China (e.g. Loeb 2017).

Does the grant engage underrepresented or community groups in the design of activities, or include underrepresented group or community consultation?  
(n=41)



One-fifth of grant reports or proposals coded included diverse or community groups in the grant design process in some way, while three-quarters did not. Those who were engaging community groups in design typically were also engaging them in the grant activities themselves. It is not clear what the “correct” level of engagement is.

Figure 13: Grant Engagement of Marginalized or Community Groups Source: SI Grant Review

## Data on distribution of outcomes are limited and do not clearly indicate gains or losses.

### POSITIVE PROGRESS

Grantees who work directly with fishers believe that their activities are promoting fishers' livelihoods and empowerment through providing them training, access to government services, and forums through which to understand and discuss environmental programs.

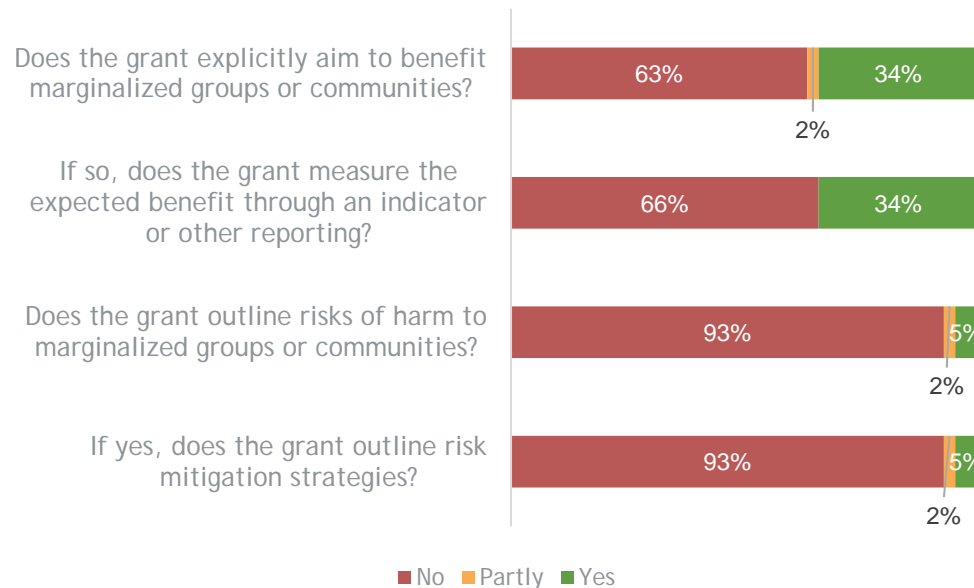
Three grantees report ecotourism programs that promote local community economic gains, though there is not yet MEL data supporting these conclusions.

### OPPORTUNITIES FOR GROWTH

Fishers reported neutral economic outcomes and limited participation in fisher committees or other such programs.

Grantees reflected on tension between high-level reforms and ground-level fishers, where those more socio-economically disadvantaged run the risk of losing livelihoods or being unable to utilize programs. This includes the need for IUU programs to account for small-scale fishers (five KIIs, Cabral et al., 2018), access to open data, access to government services, and risk of focusing on only one commodity (see EQ 1.6). The ET did not identify clear harms due to Foundation programs, but these remain risks.

There is no MEL data on outcomes for fishers or community members to systematically measure benefits or incentivize focus on these outcomes.



About a third of grants include a kind of intended benefit to diverse groups or communities, but very few consider possible risks to marginalized groups or communities (n=41).

Figure 14: Grant Benefits to Marginalized or Community Groups Source: SI Grant Review

The Foundation’s ground-level work with fishers and local NGOs demonstrates sensitivity to local power inequities and takes a Do No Harm approach, though work at the higher policy level in Japan and China has prioritized working within existing power structures.

### POSITIVE PROGRESS

Grantees working at the grassroots level with fishing communities expressed sensitivity to power dynamics their areas of operation and explained how they worked within these frameworks to promote equity, including:

- Generating value among fishers without undermining the role of the social safety net middlemen and other traditional structures provided (though fishers’ actual economic gains may be limited, see “Distributional Equity”)
- Engagement in local processes with decision-makers and elevating the voices of fishers and smaller communities
- Risks of social tensions emerging if economic benefits are inequitably distributed

The Foundation’s approach of building local NGOs and new leaders fits into the contextual equity framework of promoting the capabilities, access, and power of those with less voice, though also carries a risk of choosing winners only among those who already have access. The Foundation’s moves toward increasing diversity of grantees, particularly in the US and Indonesia, suggests that this risk has not been manifested.

### OPPORTUNITIES FOR GROWTH

There is a tension between working within existing social and power structures and promoting marginalized groups. In Japan, for example, success has hinged upon working with influential actors in government and engaging diverse groups has not been part of the primary theory of change. Similarly, in China, the necessity of working within a top-down re-granter framework is in tension with the ability to build voice for less powerful CSOs.

A little over a third of grant reports and proposals reviewed showed consideration of local power dynamics.

(n=41)

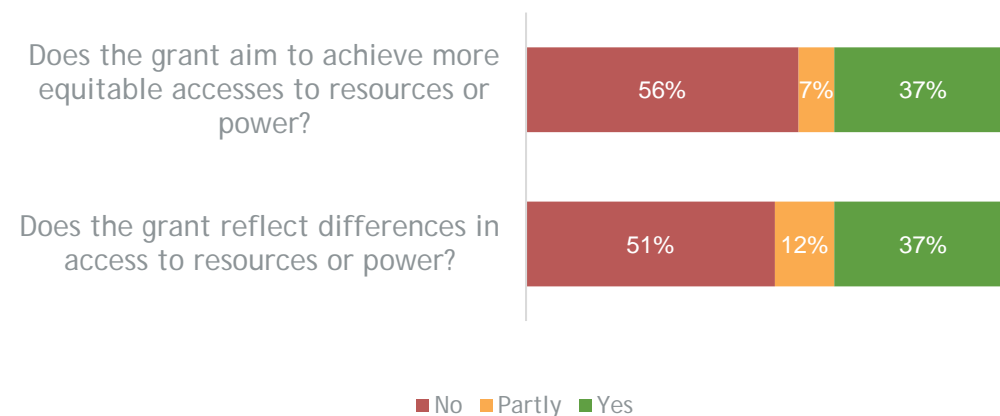


Figure 15: Grant Consideration of Contextual Equity Source: SI Grant Review



## Long term risks of OSF-related unintended consequences

Another important aspect of equity pertains to unintended consequences and the distribution of the risk entailed by the initiatives the Foundation supports. Section EQ1.0/1.2 points out three considerations in this respect:

- The extent to which the intervention include strategies to mitigate risks of growing inequality among the affected populations.
- The extent to which initiatives seek to mitigate risk of unintended consequences related to the articulation of local economies to global markets through one or few commodities.
- The risk that the trends of global seafood trade which supplying quality seafood to the international market (mostly for the US and Europe) also run a risk in the long run (2030) of resulting in nutritional deficiencies in the fish exporting countries in the Global South.

## Equity: Key Takeaways

In what ways is OSF advancing (or not advancing) equity, particularly in program design and beneficiary impact?

- The Foundation's approach to equity is not yet fully formed, and consequently, equity is not fully considered in strategy documents, communication with grantees, or measurement systems.
- Grantees provide positive examples of grassroots consultations and understanding of grassroots power dynamics, which they incorporate into program design. Such consultations, according to external research, improve outcomes. Nonetheless, many grantees have not yet thought about how to include equity in their work and would value the Foundation's guidance.
- While there is no systematic data on outcomes for communities, many of the national and local grantees work closely with local communities and incorporate social benefits to their programs. These communities are not explicitly the beneficiaries of most grants.
- Local NGOs are the beneficiaries of capacity building programs and these organizations have generally seen improvements (see EQ 3.0).
- Evaluation findings did not include any negative unintended consequences related to equity, but surfaced risks related to fishers' economic outcomes in Indonesia and top-down re-granter/grantee relationships in China.
- Risks related to unintended consequence of the OSF are not addressed by Foundation strategies or initiatives. Some of these risks to the local populations have materialized during the outbreak of the COVID19 pandemic.



## EQ 5: DURABILITY

What has been done in each strategy to promote durability of outcomes? What seems promising/likely to work (scale, replication, capacity building, leaders, institutions, networks etc.)?



The Foundation reinforces durability through working on change with different stakeholders and at different levels, making it more likely that achievements in policy, markets, and capacity will be resilient.

All Country Strategies simultaneously address mutually-reinforcing facets of their Strategy-specific goals. These approaches reinforce outcomes through ensuring that stakeholders at different levels are engaged and working on a common agenda. As indicated earlier, most Strategies have also supported grantee integration through workshops, communication exchanges, and joint project implementation to ensure coordination.

Strategies gained stakeholder buy-in by demonstrating the value of their interventions, which took different forms in different contexts. Strategies that involve fishers or MPA management typically included components that tested or demonstrated models or approaches that produced economic benefits to the local population in sustainable ways. For other stakeholders such as the MMAF in Indonesia, the benefits were demonstrated for a practical method to trace fish stocks. For ARIA, a USA grantee, the objective is to get different stakeholders to work toward the same goals while acknowledging their differences, “the objective is not to blend NGOs and business community but to get them to work together.”

## Case Studies



Through Resources Legacy Fund USA, programs include actions on multiple fronts toward common goals. Establishing the California MPA network required attention to policy goals as well as securing public funding for agencies to carry out implementation into the future. Community involvement was also important to ensure support for the reforms.



In China, the NGO China Blue supports the Hainan Tilapia Sustainability Alliance to establish supply chains for regional seafood markets. This support involves building capacities of the fishers' associations while at the same time promoting sustainable aquaculture produce among regional buyers and working with the provincial government and insurance firms to institute an insurance program that addresses the climatic risk of for tilapia production.

Photo 1 Credit: Resources Legacy Fund

Photo 2 Credit: Packard Mexico Marine Strategy





## Leadership and OE grants position local actors to influence high-level decision making.

OSF Strategies in China, Chile, Mexico, Indonesia, and Japan included robust capacity development components to ensure the durability of grant results. These capacity development components are described in more detail under EQ 3. Such approaches are durable when they are locally-owned, tailored to local context, and long-term (Bester 2015, Ould-Dada 2020). All of these elements were present in the Foundation's work, adhering to best practice models of durability.

### LOCALLY-OWNED

Capacity development is durable when it is based on self-assessment and local priorities.

- Grantees state that the Foundation allows them room to choose their own priorities, focusing grant activities on what they think are the most important challenges and opportunities.
- In China and Indonesia, key civil society building programs (Blue Pioneers in China and BEKAL in Indonesia) are implemented by local organizations. These local organizations are close to the context in which they operate and will be around for years to come.

### TAILORED

Capacity building requires adaptation to specific organizations and individuals' needs.

- Much of the Foundation's capacity building approach comes through individual mentoring from Foundation staff, investing in potential leaders and helping them grow their visions (EQ 3.2). This is a time-consuming and labor-intensive approach, but means that capacity building is highly tailored.
- OE grants are made as-needed to organizations to use for specific purposes that they determine, ranging widely from strategic plan development to leadership coaching.

### LONG-TERM

Building capacity is iterative and takes place over years.

- Packard works with partners iteratively over multiple grant cycles.



Information dissemination and awareness-raising have the potential to changes in public opinion, which can pressure markets and policy.

### Illustrative Awareness Raising Grants

Grantee	Awareness Raising Component
The Guardian	News articles on major threats to the ocean to raise awareness among the broader public
Mongabay	News articles on Indonesia marine issues to raise public awareness in Indonesia
NOPC	Public communication toward raising the public's value of marine monuments and commitment to marine monument defense in light of the threats faced by the current USA federal administration
TNC	Publishes information on the snapper population to make this information wider and permanently available and as a way to make the effects of this information durable
DAN	Invests resources in documenting environmentally harmful projects and in making them available as legal precedents for litigations to stop environmentally destructive projects

All strategies included some elements of awareness-raising and information dissemination. By engaging the public as a stakeholder, the Foundation creates another vested interest in marine conservation and promotes public support for policy outcomes (Drummond et al., 2018).

Table 16: Illustrative Awareness Raising Grants. Source: Packard FLUXX Data



## Long-term support to and flexibility with grantees promotes a durable civil society acting on OSF priorities to reinforce policy achievements.

In nearly all interviews, key informants reported that the Foundation’s long-term commitment to their grantees, and their flexibility on grant outcomes, testing models, adapting to unforeseen circumstances are factors that contributed to positive and durable project results. Several key informants reported that Packard takes a long-term approach and does not necessarily make large changes in the short term. This level of consistency and predictability improves partner capacities and promotes durability of results through minimizing disruption and building strong understandings and relationships with partners (Paul et al., 2015). One grantee said, “[Other] marine funders can sometimes be quite unrealistic where they want to see specific results and don’t see the value of the process and maintaining engagement with partners.”

### Case Study

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Photo Credit: Monterey Bay Fisheries Trust

The Foundation provides general support grants to the Monterey Bay Fisheries Trust, which works to advance the social, economic, and environmental sustainability of Monterey Bay fisheries. As the Trust expanded, so did support from the Foundation, which allowed it to develop and implement a longer-term strategic plan and expand its funding base to donors including the National Fish and Wildlife Foundation, City of Monterey, and Rotary International.



## Long-term support to and flexibility with grantees promotes a durable civil society acting on OSF priorities to reinforce policy achievements. (Continued)

Grantees indicated that this approach also promotes the enabling environment for policy changes (and defense against negative policy changes), which typically take years of stage-setting and happen on an unpredictable schedule. Consistency in addition to flexibility—allowing grantees to rapidly adjust programming when opportunities arise—has enabled grantees to opportunistically identify policies on which to work and thereby make durable change.

Coordination through funder collaboratives similarly supports this consistency and creates a safety net against disruption through minimizing funding gaps of critical initiatives. In some cases, the Foundation has come in with funding for grantees who have lost other donor support due to shifting donor priorities.

### Case Study



Photo Credit: NOPC

The National Ocean Policy Coalition (NOPC) works to increase and preserve the number of national monuments in the US. In response to the change in presidential administrations in the US in 2017, NOPC pivoted from prioritizing new marine monuments to developing tools and maintaining government relationships, as well as mobilizing the ocean community to speak out against marine monument rollbacks. This pivot required flexibility from the donor and willingness to fund longer-term strategic positioning rather than a need for immediate results.

Despite these successes, there are several risks to durability that require ongoing management:



#### POLICY/INSTITUTIONAL

- Environmental policy rollbacks
- Poor governance/enforcement of policies and regulations
- Bureaucratic turnover
- Personality-driven policies vulnerable to administration shifts



#### FINANCIAL RISKS

- Budget cuts to key agencies
- Financial sustainability of CSOs, including lack of non-Packard funding for core business costs
- Grantee dependence on single or few commodities and vulnerability to market shocks



#### COMPETITION AMONG ACTORS

- High cost to supporting coordination
- Program/project redundancy
- Working at cross-purposes with other funders



#### CLIMATE-RELATED IMPACTS

- Extreme climate events disruptive to coastal geographies and global supply chains
- Stock migration and potential administrative and political costs



# Scaling Models and Outcomes

As scaling pertains to dimensions of time and space, it is closely related to durability. Scaling is defined as “expanding, adapting and sustaining successful interventions (policies, processes, programs or projects) in different places and over time to reach a greater number of people”. (Hartman and Linn 2008) .

## Common Scaling Mechanisms

Three mechanisms frequently used by development projects for scaling results are:

- **Mainstreaming**, which involves elements of organization-supported approaches being incorporated in laws, policies, regulations, programs, and other stakeholder initiatives that are usually already part of a regular program or mandate;
- **Replication**, where the organization-supported approach or technology is adopted in other localities at a comparable administrative or ecological scale; and
- **Scaling-up**, where a similar initiative is implemented in a larger geographic area, often including new aspects or concerns of a political, administrative, or ecological nature. This last is useful in addressing issues that cannot be resolved at lower scales and in spreading the promoted interventions to contiguous areas.

These three processes of broader adoption may be at work at the same time for a given demonstration and may take place at different scales. Often, one process may have to occur for another to take place. (GEF 2013)



## Scaling Strategy Projects and Outcomes (cont.)

### Scaling is being considered by Ocean Strategy teams

Much of the Foundation's work is contributing to the scaling of its program results. The Foundation's support to GSM has been comprehensive in this way, including demonstration projects for FIPs, promoting policy and regulatory reforms, introducing models for industry engagement, generating supply and demand for the development of sustainable seafood markets, and supporting services to carry out certifications and make information on FIPs widely available. The Indonesia Marine team's strategy, too, takes a comprehensive approach to the development of archetype fisheries that can be replicated across the country and explicitly contains goals around mainstreaming, replication, and scaling in its Strategy. Other Ocean strategies also work at varied levels simultaneously, supporting advocacy campaigns and initiatives that have helped mainstream science into laws, regulations and planning processes, or are helping to build domestic capacities to address ocean concerns at different levels. The Foundation cultivates multiple partnerships that help expand the benefits of its work.

### Opportunities for Explicit Integration of Scaling Mechanisms

While the Foundation's work includes many aspects contributing to scaling results, most strategies lack guidance on how to scale the initiatives or how different grants are integrated to enhance scaling. Studies and evaluations on scaling vary in orientation, but most agree that a key factor hindering the scaling of results is the insufficient early attention to how scaling of result is expected to take place (Hiller et al 2015).

While schools differ on the specific aspects that require attention the scaling process, the following points capture the broad aspects of the process (Ghiron et al 2014; Cooley and Linn 2014):

- Demonstration and communication of the benefits of the model or innovation
- Identification of changes, and their timing, that need to take place
- Identification of the levels at which changes need to take place (i.e. local, national, global)
- identification and commitment of the stakeholders that need to be engaged at the different stages and levels,
- Identification of the necessary financial and technical resources needed
- Monitoring progress and contextual factors that might require adjustments of the strategy.

Most initiatives financed by the Foundation lack these type of specific roadmaps that indicate how scaling is expected to take place.

## Durability: Key Takeaways

What has been done in each Strategy to promote durability of outcomes? What seems promising/likely to work (scale, replication, capacity building, leaders, institutions, networks, etc.)?

The following have been done under different Strategies and have proven promising:

- Integrating approaches that address multiple enabling conditions
- Building capacity and alliances
- Awareness raising and information dissemination
- Long-term commitment to grantees and geographies
- Maintaining programmatic flexibility to reinforce approaches as needed
- Testing models and approaches for scalability

Often missing is:

A roadmap that indicated the steps that will be adopted during the intervention to enhance scaling. Scaling strategies would be developed early in the process and should be reviewed regularly and adapted to changing circumstances.





EQ 1.6 (Indonesia): RELEVANCE

To what extent is the model we've put in place sound?

## A Note on Fieldwork

Fieldwork in Indonesia interviewed stakeholders in Jakarta, Bali, and Lampung. While this included a cross-section of a variety of approaches from the Indonesia portfolio, the fieldwork data collection related to the Indonesia Strategy's Blue Swimming Crab (BSC) interventions in Lampung was relatively more in-depth than mixed snapper fisheries or tuna. Consequently, this section pulls many examples from the Foundation's BSC work in particular.



## The Indonesia Strategy model is founded on the following elements:

Provide Evidence of Good Fisheries Management	Blue Swimming Crab
	Snapper
	Tuna
Inform Fisheries Management Policy Reform	Management principles are scientifically based
	Effective CSO and private sector coalitions advocate policy reform
	Policies support localized fisheries management systems
Capacity and Leadership Development for Improved Management	Relevant MMAF and provincial staff have improved capacity for implementing sound fisheries management
	CSO, industry, and media leaders have the capacity to guide fisheries and policy reform efforts
	Coalitions working to build successful examples of fisheries in governance in action beyond the target fisheries

Source: Indonesia Marine Strategy, June 2018



## Within each of the main pillars of the model, successes demonstrate the soundness of the model. Some elements of the model have not been fully tested yet.

Provide Evidence of Good Fisheries Management

The BSC and snapper fisheries work in Indonesia began with industry, government, and community partners (see EQ 3.0). These provided the foundation for generating evidence of fisheries management best practices and results. The major risk to this part of the model is enforcement, which could undermine environmentally and economically sustainable progress for fishers and industry.

Inform Fisheries Management Policy Reform

Technical assistance led to some reforms, including institutionalization of new regulations (See EQ 3.5 for more detail).

CSO and private sector coalitions to advocate with government are recent, so the ET cannot draw any conclusions about this aspect of the model. Industry, CSOs, and government have been working together on BSC sustainability in Lampung, though the recency of this collaboration means that progress toward goals has just begun. However, risks to this model include low CSO capacity (see EQ 3.4 and 4.2) and private sector interests misaligning with sustainability (see EQ 4.1).

Capacity and Leadership Development for Improved Management

This includes, for example, capacities to produce information to support MMAF development and catch monitoring, capacities to support MMAF implementation of regulations, and capacities to support fishers' organizations at the local level and extension services at the provincial level as in Lampung.

At present, INGOs are still leading the Foundation's fisheries and policy reform activities, though strong media partners such as Mongabay, and have demonstrated capacity. CSOs have the will to guide fisheries and policy reform efforts (EQ 4.2), though they will require concerted capacity building in order to succeed in more of a leadership role. Such efforts have been successful in other Foundation focal countries such as Mexico, suggesting that this part of the model is sound if resources are put into it.

Coalitions working on model fisheries governance have not yet resulted in uptake in other fisheries because of the early stage of this process. It is too early to tell if this part of the model will play out in Indonesia.



# Scaling Models for Sustainable Fisheries Management at Local, Provincial, and National Levels

Caveat: The ET did not directly focus on mechanisms to scale models and interventions during the evaluation fieldwork. Some grantees and strategic partners that would have been able to speak to these mechanisms were not available to the ET. Though limited, the following represents our analysis of fieldwork responses regarding three mechanisms for scaling; mainstreaming, replication, and scaling-up of interventions. Please see EQ5.

Scaling encompasses work in management, policy, politics, institution-building, and capacity-building. At the provincial level, with BSC in Indonesia, the Foundation is responding to an absence of government leadership by working on market-based strategies that encourage self-regulating changes toward sustainable fisheries management.

## Mainstreaming

### Examples:

- Integrating BSC fishery model into provincial government through multi-stakeholder engagement and passing Zoning Plan to limit BSC stock depletion.
- Deploying SNAPPER stock assessment technology at Fisheries Research Agency

### Challenges:

- Bureaucratic turnover presents difficulties for investing in the relationships that drive government engagement.
- National-level political leaders have wide leeway to reverse policies of previous administrations.
- Fisheries management is new in Indonesia, and not yet fully understood at all levels of government (2 KIIs). Provincial government respondents said they are not ready to administer sustainable BSC management models without NGO help and would require a robust exit plan when they eventually do leave (2 KIIs).
- Local and provincial government does not have funding resources to take on sustainable management in fisheries (3 KIIs).
- Local governments are not incentivized to manage marine resources, as it doesn't generate Local Own-Source Revenue and provincial management is not mandated in the Constitution (2 KIIs)

## Replication

The ET did not find evidence that models were ready for replication, though this could be a limitation of the evaluation design. But, it is also likely that not sufficient time has taken place for initiatives to have been replicated.

## Scaling

The Indonesia team's model of investing in an initial round of grantee funding to test models and demonstrate their use, and a second round of funding to scale that intervention to higher levels, was mentioned by two INGO grantees as the crucial factor in being able to implement their programs at the national level.

One respondent recommended that the Indonesia team could do more to integrate the work of actors across local, provincial, and national scales. This and other issues on scaling are likely to be addressed as soon as the IMS team is in the process of defining the pathways for scaling as referred to in EQ5.




One risk of the model is that by focusing too much on specific commodities, local societies and economies could become vulnerable to global market downturns.



Photo Credit: Social Impact 2019

Seafood production and trade is exposed to disruptions including fishery collapses, natural disasters, global production volume fluctuation, policy changes including tariff and non-tariff barriers, and exchange rates (Primefish 2018). Despite the implementation of sustainable practices, when focusing on particular species, local fisheries are susceptible to global conditions that cannot be controlled locally (Robards and Greenberg 2007). Other studies have found that fishers' exit from fisheries varies highly depending on the extent of dependence on fishing and other national and global factors (Daw et al., 2012).

The flexibility the Foundation provides grantees allows grantees to manage this risk. One positive example of risk mitigation is in Lampung, where Starling support to fishers mitigate seasonal fluctuations in swimming crab catch with shrimp fishing.

A person's hands are shown holding a fish, with a blue overlay across the entire image. The background is a blurred image of a person in a blue shirt. At the bottom of the image, there are decorative white wave patterns. The text is centered in the upper half of the image.

## EQ 3.4 (Indonesia): EFFECTIVENESS

To what extent has our investment built or strengthened capacity?



## Successful grants helped build capacity within targeted provincial governments.

### LAMPUNG

The ET focused on BSC in Lampung as the provincial-level archetype fishery model explored by the Indonesia Marine Team. The Sustainable BSC Fisheries Management Committee (KKPRB, or the Committee) was the result of multi-stakeholder engagement among Foundation grantees, fishers, middlemen, industry, and MMAF representatives to coordinate actions and support capacity where the provincial government lacked budget. Government respondents saw the committee as useful to creating a common understanding on BSC conservation and sustainable fisheries management, which led to a broad, coordinated government approach in the region (two KIIs). The Committee has supported local government training to set targets and indicators for sustainable marine resource use (one FGD), while the Coral Triangle Center (CTC) training increased leadership and organizational capacity for public servants and fishers (two KIIs). Government stakeholders realize that INGO-based work in the region is temporary and are seeking to internalize their fisheries management models.

Respondents also noted the Committee strengthened fisher representatives' knowledge of BSC data collection, traceability, sustainable fishing gear, legality of certain fishing practices (e.g. size, type of BSC) as well as their ability to manage and disseminate those best practices to fishing groups (three KIIs).

### CHALLENGES

- Generally, respondents commented that rotation of government officials at all levels makes it hard to invest in the relationships that drive government uptake of grantee models.
- Fisheries management is new in Indonesia, and not yet fully understood at all levels of government (two KIIs).
- Grantee and government respondents in Lampung reported that local and provincial government capacity is low in terms of skills and knowledge, and that they do not have funding resources to take on sustainable management in fisheries (three KIIs).





## At the national level, capacity-building efforts are an ongoing challenge.

The Foundation's grantees are laying the foundation for national-level government stakeholders to make informed decisions on marine management through activities such as trainings to government officials on IUU issues and creating fellowships for government officials on policy analysis.

### SUCCESSIONS

Approaches that grantees considered successful included: engaging policymakers with the secondment of a civil society technical advisor to the ministry; provision of better stock data for management decisions; and curriculum development on marine conservation management and policy analysis to frame Indonesians' behavior as economically-driven and related to financial regulations, and their application. Grantees also referenced the Foundation's strategic strength as a donor, meaning it is able to access and communicate with high-level decisionmakers at the government, something that NGOs "can't actually reach most of the time."

### LIMITATIONS

The effectiveness of these capacity-building efforts is hampered by high rates of turnover at the Ministry (four KIs), shifting government priorities (two KIs), and failure to coordinate programs among siloed Director General (DG)-level stakeholders (two KIs). Respondents spoke to government stakeholders' preoccupation with the economic impact of sustainability measures on fishers' livelihoods (two KIs).

"[Capacity building for] government staff is often some of the most challenging. You put all your resources to developing one guy and all of a sudden he gets transferred and you have to start anew. We've learned to not just invest in the people but also to invest in the system through work that leaves a legacy - like regulations."



## Work to build local organizations' capacity is a key emphasis in the Indonesia Marine Strategy, though capacity remains relatively low.

### NGO CAPACITY AND ROLE

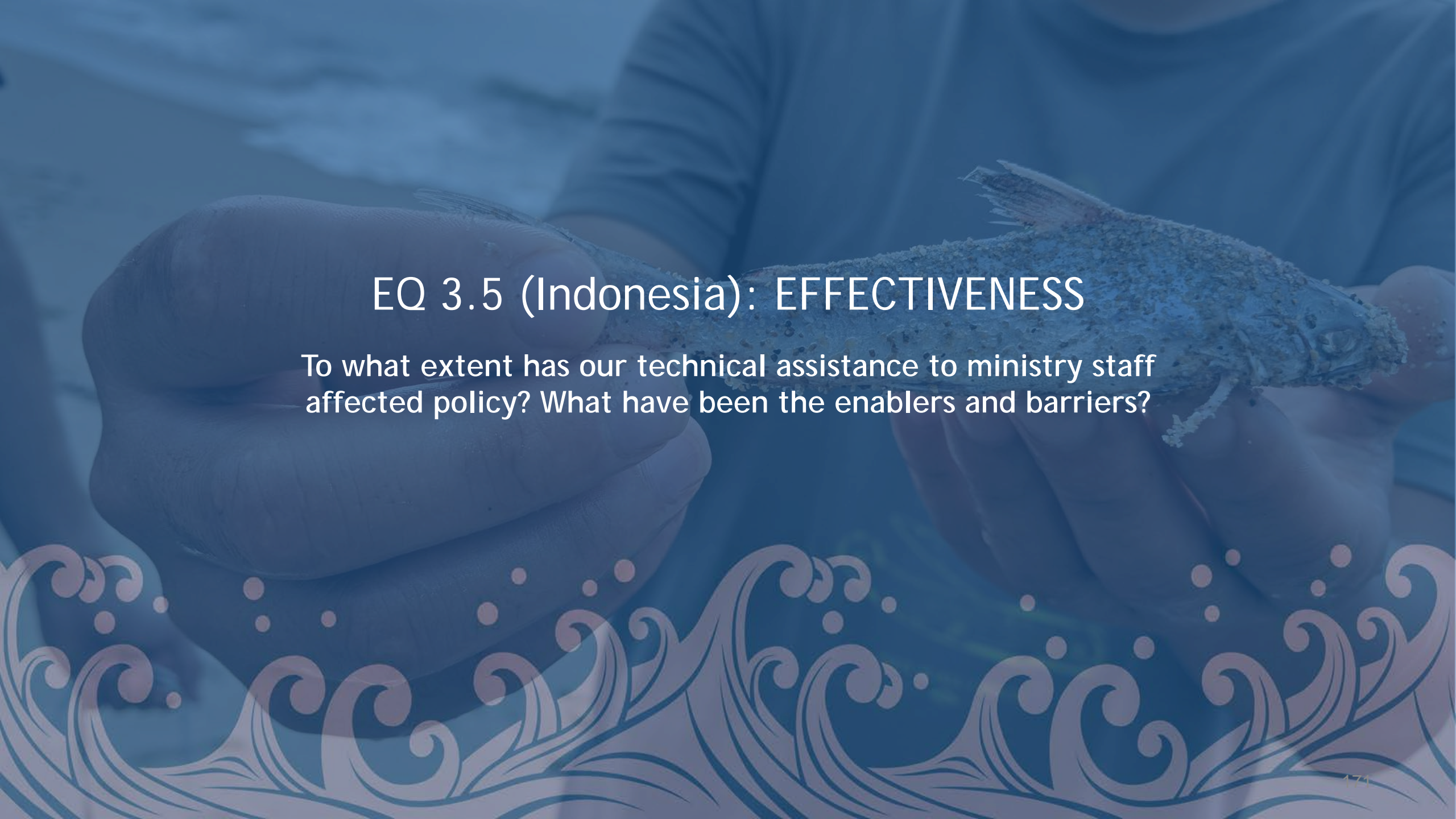
Government and local stakeholders say local NGOs are important to engaging local communities (six KIIs) and they prefer working with them to INGOs because of local NGOs' long-term geographic commitments, ability to collect data directly from fishermen to identify management and policy gaps at the community level, and leeway to directly advocate for policy changes, where government officials may be constrained by political norms and bureaucracy (See EQ 4.2 for more on INGO/NGO relationships). A Lampung industry respondent noted that without support from government and NGOs, it would be difficult for companies to comply with regulations and support fishermen on conserving marine resources.

However, respondents reported capacity among local NGOs is low (seven KIIs). Some grantees noted the inconsistent quality of stock data collected by local NGOs, while government respondents noted problems with multiple approaches to data collection which led to data incompatibility and difficulty to aggregate data. This is discussed further in EQ 4.2.

### CAPACITY-BUILDING EFFORTS

Examples of grant-based capacity building programs underway in Indonesia are Catalyze Communication's work with grantees on communication skills, OE grants to organizations including CTC and United in Diversity (UID), and UID's BEKAL program to build leadership capacity among NGOs, industry, and government stakeholders. Respondents also noted that the Foundation plays an important role in non-grant support to local partners, including expanding their networks, helping with organizational development, and linking grantees to other donors. Two KIIs stated that the Foundation could do more to engage with industry and government stakeholders, noting the Foundation convenings lack important representation from local stakeholders outside the NGO community.

“Big NGOs, not only on marine issues, have caused the [local] NGO environment to stagnate because these small NGOs aren't getting opportunities to grow. The disruption and opening opportunities for these local partner...is key for the long term strategy.”



## EQ 3.5 (Indonesia): EFFECTIVENESS

To what extent has our technical assistance to ministry staff affected policy? What have been the enablers and barriers?



# The Foundation’s technical assistance to ministry staff had success in influencing policy and institutionalizing programs.

## Successes:

Where grantees have worked closely with government—either through staff secondments, creating systems with ministry input, or developing committees and development paths—government has institutionalized these systems (six KIIs). At the national level, the most prominent example cited was the SNAPPER program headed by TNC, USAID, WFF, and the Packard Foundation. Three KIIs reported that provision of fish stocks and capacity-building to utilize this information will be important to the national regulation of fisheries.

## Challenges:

Two NGO respondents noted that the durability of outcomes from ministry engagement is limited by a political climate where national policymakers are deferential to administration heads and policies and programs implemented by one administrator are vulnerable to change. Two respondents noted that partners should begin to build relationships with members of parliament for awareness-raising of marine issues and for their budget approval authorities.

## Case Study



Photo: USAID SNAPPER 2019

TNC spearheaded the SNAPPER initiative, partnering with the Packard Foundation, WFF, and USAID in engaging with government decision-makers through provision of scientific evidence, such as high-quality data on deep-water snapper stock declines, which the government did not previously have. This new data led to snapper being designated as one of MMAF’s six priority areas.

**Note:** The IUU Task Force’s work on building awareness of human rights violations with law enforcement and work on policy: 1) amending the fisheries law to optimize IUU sanctions, 2) establishing a Minister of Regulation for out of court settlements, and 3) regulations on licensing were mentioned in KIIs, though the ET was unable to verify outcomes due to limited access to relevant government respondents.



Enablers include presenting research and data, flexibly working directly with government on their priorities, and building relationships with government.

### POLITICAL ENGAGEMENT

The Indonesia Strategy's political advisor's connections to government stakeholders have been important in linking the Strategy with government, but equally important has been the Foundation's participatory approach to government engagement. Understanding government needs and priorities, while building relationships over the long term, has helped cement relationships that were a prerequisite for policy accomplishments (four KIs).

### FLEXIBILITY

The Foundation's flexibility to respond to emerging needs for technical assistance enabled them to demonstrate value to government, thus further improving relationships and government's willingness to engage with Foundation grantees.

### NGO COORDINATION

In 2018, as part of one initiative three different grantees ran separate data collection programs for a two fisheries. Beginning in 2019, these organizations began working together. Government respondents stated that they found the disparate data sources coming from different NGOs to be counterproductive (three KIs); this increase in coordination is a step toward decreasing confusion and improving governments' ability to use information from NGOs.

Barriers include enforcement, turnover, political opposition, and bureaucracy.



### ENFORCEMENT

Factors that complicate enforcement of fishing regulations include lack of government capacity to adequately monitor the waters, opposing industry and fisher economic incentives to ignore regulations, widespread bribery, IUU fishing by international and interregional actors, and lack of government focus on managing domestic fisheries (see EQ 3.0 for further detail).



### POLITICAL OPPOSITION

Opposition from industry and sometimes from within the ministry (reliant on the Minister's approval) slowed or even reversed policy changes such as a moratorium on foreign fishing vessels and a ban on foreign investment in Indonesian fisheries (four KIIs).



### BUREAUCRACY

Bureaucracy and the need for multiple levels of approval slowed the pace of change on policy issues. Government officials do not feel empowered to take action or present arguments that do not align with the Minister's priorities (two KIIs).



### COMPETING LIVELIHOODS PRIORITIES

Government stakeholders worry that sustainable fishing policies will negatively impact the economic status of fishers; for example, Minister Susi stalled enforcement of a trawl ban in North Java after fishermen protested that they had not received adequate financial assistance to change from fishing nets during the transition period (two KIIs).



### TURNOVER

Changing personnel within government and committees, including at the Minister level in 2019, confounded grantee's ability to build enduring technical and managerial capacity for sustainable fishery management at the provincial and national levels (two KIIs).

"The politics of this country are complicated. The leader - if the government changes, the whole structure changes. You need to invest in many, many people."  
- Grantee KII



## The former MMAF Minister was both an enabler and a barrier.

Indonesia's personality-driven political system enabled the previous MMAF Minister, Susi Pudjiastuti, to back a system change toward sustainability-focused outcomes. By the end of 2018, the Ministry had detonated nearly 500 illegal fishing vessels in Indonesian waters, imposed a moratorium on the issuance of fishing licenses for foreign vessels, banned mid-ocean transfer of fish catch between boats (transshipment), established 200,000 square km of marine protected areas, and published the first national Vessel Monitoring System dataset ("Indonesia's ex-fisheries minister leaves big shoes to fill" 2019). Ibu Susi is no longer the MMAF Minister, but future actions will need to take into account the new Minister's priorities.

### Enabler

Minister Susi strongly pushed IUU and small-scale fishery reform into the national conversation. For example:

- Minister Susi empowered the IUU Task Force to work with other Director Generals and provide policy advice and legal opinions on issues such as bottom trawling and foreign investment in Indonesia's capture fisheries industry. An analysis and evaluation of over 1000 fishing vessels found legal violations including human trafficking, prohibited fishing gear, fishing license fraud, and fishing in unauthorized waters. Minister Susi also encouraged the Task Force to engage cooperatively with international stakeholders, including INTERPOL, to further IUU cases.
- Creative engagement with Minister Susi led her to speak at the shark and ray (S&R) symposium in Indonesia, which garnered attention within the government and general public and contributed to a national and regional platform for S&R collaboration between the attending organizations and researchers.

### Barrier

At the same time, if Minister Susi did not approve of certain policies or actions, there was no way for them to move forward. This caused barriers for grantees such as blocking uptake of industry development plans generated through CSF's economic policy analysis capacity building.

Some respondents spoke of uneven practices in the application of the law, which typically focused on infractions by foreign vessels, but took a more lenient stand toward Indonesian vessels.

"...the bureaucracy climate is very bad because they are afraid of not being seen as in line with Ibu Susi's policies...The DG would say the right thing about regulations on coastal reclamation but would not dare to speak about the political economy behind it, that's the role of the NGO."



## EQ 4.1 (Indonesia): EQUITY

Who within these communities have benefited and how? Where have our efforts potentially spurred inequity?





Industry, mini-plants, and middlemen have benefitted from growth in the blue swimming crab industry and maintaining their ability to comply with regulations. Fishers find regulations burdensome and are not clearly seeing economic benefits or losses.

### INDUSTRY

According to Lampung government officials, the Foundation's support to the KKPRB via EDF and Starling led to the inclusion of BSC into local development plans, which in turn led to the growth of BSC as an industry in Lampung.

### MINI-PLANTS

Mini-plants have received training in compliance and best practices such as hygiene and current regulations, enabling mini-plants to retain their place in the supply chain for eventual export.

### MIDDLE MEN

Middlemen have received training in regulations, business practices, and financial management to promote their business. They often represent fishers' interests on the committee.

### FISHERS

The program orients fishers on regulations such as minimum crab size, boat registration, and permitted fishing gear, and assists with compliance so that they can continue to supply middlemen. Fishers found current fishing regulations difficult to comply with because of difficulties traveling to government offices for necessary procedures, unfamiliarity of paperwork, and the decreased catch that compliant nets yield. They identified neither economic gains or losses, framing their income from fishing as "about the same" as it was before the program and complaining of unpredictable BSC sale prices; government and industry thought fisher income had improved.



Each part of the supply chain is highly reliant on the others, but beholden to those above them on price. This poses a potential barrier to benefits disseminating evenly throughout the supply chain.

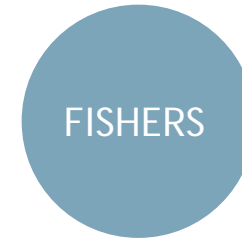
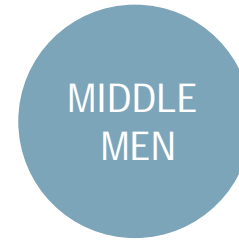


“There was a case last year when we got a big supply. At that time, the price dropped because they said the quality wasn’t very good but they kept taking all we were supplying. If the quality is not good, why do they keep taking what we supplied?” -Middle man

“When [fishers] are dependent, the middle men determine to which companies they will sell and the fishers don’t have any bargaining power on the price. Because of this, the fishers stay poor while the middle men get rich. They live in the same village, but the middle men have better homes.” - NGO



Women have benefitted from increased employment opportunities, but are rarely viewed as important stakeholders.



Women work in mini-plants, though mini-plant owners (sometimes also women) are considered the main stakeholder.

Women make up the majority of workers at mini-plants and, according to government officials, benefitted from increased employment opportunities following the inclusion of BSC in district development plans. As mini-plant workers, they receive relevant quality control trainings through the program.

Women are not represented on the fishers committees; as mini-plant employees, they are a blind spot in the supply chain.



## Fishers' groups give an opportunity for fishers to have voice with government, though this is mediated through middlemen.

The Foundation's BSC programming established a committee to bring stakeholders together, including fishers. Fishers, middlemen, and NGOs noted that government tended not to be in touch with fishers' needs, basing decisions on high-level analysis and providing social programs without community needs assessments.

The committee provides a more direct way for fishers' interests to be represented. Fishers are typically represented by middlemen (who are often fishers themselves and from the same community). This further entrenches the reliance of fishers on middlemen.

"I'm not so actively involved in the meetings, because the city is far and if I go to the meetings it means that I cannot go fishing."

"Before the committee was established, the government did not really give fishers much attention, no trainings. Mostly training came from companies. After the committee was established, government started to pay more attention to fishers' groups....In the committee we are able to voice what our fishers need."

"Government programs don't match people's needs. They don't do field verification to see if their information is accurate."



## EQ 4.2 (Indonesia): EQUITY

To what extent are we adequately listening to local partners? Are they interested and engaged with our strategy?



Currently, the Foundation’s work in Indonesia has local partners in secondary roles to INGOs. The Foundation has recently begun to address this discrepancy and is in an early stage in this transition.

**INGOs dominate the Foundation’s portfolio in Indonesia, due in part to low local NGO capacity.**

- 78 percent of grant funds are currently going to large INGOs such as EDF, TNC, and Conservation International (CI) as prime awardees, though the Foundation plans to substantially increase the percentage of funds to local NGOs over the coming years.
- Local partners play a smaller role now, often as communications or research partners, or as sub-grantees.
- Stakeholders pointed to a lack of local NGO capacity in terms of meeting donor expectations for proposals, reporting, and other deliverables, which requires more capacity building and investment of Foundation staff time to ensure quality and accountability.
- Conversely, the large INGOs are historic partners with which the Foundation has a long working relationship. These organizations know how to work with the Foundation and the Foundation knows how to work with them; this makes granting to these organizations relatively easier and less risky while also ensuring continuity of program activities.
- These factors create disincentives to transitioning work to local partners and mean such a transition is likely to be slow and will require continued investment of capacity building resources.

**Recent capacity building initiatives for local partners has included:**

- Since 2016, X local organizations in Indonesia have received OE grants to build capacity.
- Grants like BEKAL through United in Diversity aim to build a pipeline of civil society leaders, addressing the long-term problem of the relatively small pool of local organizations with which to work.

“[Packard] needs to pull in the local partners. This takes double the effort on the part of the grantees. It takes time to build their resources, but in terms of durability this is necessary for sustainable development.”

Grant distribution between INGOs and Local NGOs

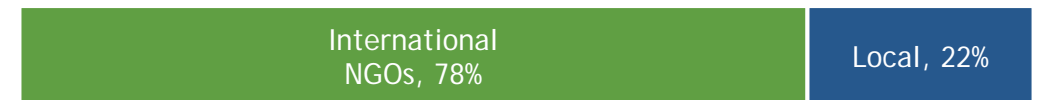


Figure 16: Grant Distribution between INGOs and Local NGOs



Local partners are interested in engaging with the Foundation’s strategy further and felt barriers in communicating with the Foundation directly, which consequently limits the extent to which the Foundation is able to listen directly to them.

Barriers included:

**CULTURAL AND CONTEXTUAL BARRIERS**

Though they appreciated the Foundation’s openness and responsiveness, local partners felt challenged in communicating with an American given different cultural backgrounds and contextual knowledge. This includes communication in English.

**HISTORIC RELATIONSHIPS WITH NGOS**

Local partners saw, through the granting structure that prioritizes INGOs and through whose advice was incorporated into past strategic refreshes, that INGOs have access to the Foundation that they do not.

**LACK OF ON-THE-GROUND PRESENCE**

Local partners wished for a local Indonesian representative for the Foundation with whom they could communicate more continuously and informally. The Foundation has hired In-Country representatives in the past and its hiring of an in-country Advisor, who began in early 2020, is likely to meet this concern and lessen the identified cultural barriers.

“They are US based - sometimes there is an information gap that is difficult to communicate...it’s not really hard to get access to the Foundation but it is easier for Indonesians to talk with more Indonesians. To have knowledge about bureaucracies, the fishermen, the economic and political situation.”

“They take certain opinions and more input than from others, so while they are engaging more grantees in Indonesia, the actual weight is limited to a handful of expats living here.”

Seven KIIs thought that local partners should be consulted more and were interested in being more engaged.



## EQ 2.4 (China): INTEGRATION

Is the China Strategy sufficiently integrated/coordinated with non-philanthropic donors/funders?





The China Marine Funders Alliance has, in a challenging environment, helped integrate donors including multilaterals, though there is opportunity for further direct integration and coordination.



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In China, the Foundation has promoted a regular meeting of national and international philanthropic Ocean donors through the China Marine Funders Alliance (CMFA). The Foundation funds a part-time consultant to coordinate the information exchange and plan events. This group has proven to be a useful source of information and exchange among donors, given the policy changes toward NGOs and foreign assistance that have taken place in China over the last two years. Some donors have decided to temporarily hold their granting activities in the country. In other cases, donors have taken a lower profile limiting information they make public on their granting operations. In this context, the China Marine Funders Alliance has become an important source of information exchange.

Participants in the CMFA are primarily foundations, though multilateral such as the UNDP-GEF are also members. UNDP-GEF's Small Grants Program (SGP) provides small grants (50,000 USD or less) to community organizations and local NGOs in the context of a formal agreement with the Chinese government. Given the administrative and political challenges of direct grantmaking in China, there is an opportunity for the Foundation to expand its support to Chinese organizations through a cooperative agreement with the SGP.

Photo Credit: CMFA Website.

A person's hands are shown holding a piece of wood, possibly a branch or a piece of bark, against a blue background. The image is overlaid with a semi-transparent blue filter. At the bottom of the image, there are decorative, stylized wave patterns in a lighter blue color. The text is centered in the upper half of the image.

## EQ 3.6 (China): EFFECTIVENESS

Where and how are CSOs listened to and used by different levels of government?



## Government respects scientific evidence and highly professional CSOs.

With a recent shift in government priorities toward fisheries reform in the 2016 5-Year Plan, the government is actively looking to improve its environmental policies and practices, which opens space for discussions with actors in the environmental space (four KIIs). However, INGOs are adapting to a squeezing civic space due to an increasingly tense US-China relationship, a restrictive INGO law, and a general sensitivity toward working with foreign organizations (three KIIs; China Dialogue Trust Final Narrative Report 2019; WildAid Interim Narrative Report 2019).

Under Foundation grants, the government has been willing to listen to CSOs when they bring a scientific approach and data. Most prominently, this includes China Blue (five KIIs). Government officials and other CSOs/NGOs call out China Blue as being especially respected and listened to by government because of their professionalism and science-based analysis (3 KIIs). China Blue works primarily with provincial and local governments, which were generally more responsive to NGO assistance than the national government.

“The Foundation’s support to China Blue can be complementary to the policy making process....They are like a bridge between communities and governments. Packard supports China Blue’s organizational development, business expansion, and suggestions to governmental policies—realizing a virtuous circle. This kind of support is rare in China....The government used to focus on mid- or large-size fisheries, but based on China Blue’s research they are focusing more on sustainable small-scale fisheries. China Blue’s efforts have filled gaps and been accepted by relevant government agencies.”

“For example, China Blue is doing a lot on small-scale fisheries - studying [these] kind of small-scale fisheries, and also supporting them on alternative livelihoods like ecotourism or others. They also have a very good relationship with the government. They can get help with promoting the ideas of small-scale fisheries.”



## Where and how government engages CSOs differs at different levels of government.

### LOCAL GOVERNMENT

Local government responds well to CSOs that have or develop close relationships with their communities and want to build capacity, and change may happen more quickly at the local level.

### REGIONAL GOVERNMENT

Regional governments are confident in their capacity but want to understand more what is happening globally, which has been the most successful entry point for CSOs.

### NATIONAL GOVERNMENT

National government tends to be more self-sufficient and is less disposed to NGO support.

“Those CSOs are much quicker [than us in government], I think they are really valuable in improving government. And we want to have more advanced technologies... Those NGOs and CSOs are professionals in their respected area.... Sometimes the trainings are too abstract, but [this CSO] gave us practical demonstrations.”

“There is a lot of global innovation and capacity in the government being developed. The government is quite familiar with the local side. With NGO help, we are gaining the global perspective. We are seeing what they do in the foreign programs... we want China Blue to invite NGOs and international institutions to join our seminars to combine the local and global issues. This is an important window for us to open.”

A person's hands are shown holding a piece of wood with a hole through it. The background is a blue-tinted image of a person's hands holding a piece of wood. The overall image has a blue tint and a decorative wave pattern at the bottom.

## EQ 3.7 (China): EFFECTIVENESS

What mechanisms are CSOs using to engage with government and influence policy?



# Linking directly with scientists is a common and successful approach that government respects.

Government stakeholders have been willing to engage with and use Foundation-supported CSOs when they bring scientific evidence that speaks to government priorities (six Klls).

Policy makers and the scientific and academic community are tightly connected (five Klls); scientists and academics in government think tanks and government-funded universities contribute recommendations to the 5-year plans and new policy formulation. Historically, however, CSOs and the scientific community have not been well-linked (two Klls). Under Foundation grants, CSOs in China are now focusing more on these connections. Connections with the scientific community is another entry point for promotion of CSO policy priorities.

## Case Study



Natural Resources Defense Council (NRDC) and EDF worked with the Fisheries Ministry, which was under-resourced and in need of technical assistance to integrate the latest scientific research into a Total Allowable Catch (TAC) pilot in Zhejiang province. NRDC gained access to government decisionmakers by supplying information such as translated legal briefs and analysis. EDF coordinated scientists to attend international workshops in China to support the pilot.

Photo: Hangzhou, capital of Zhejiang province/China

“The main Chinese decision makers, ministers and division heads tend to have a fisheries or economic background. You can only convince them with a strong social and economic argument... The government wants to hasten reform to fix management systems. They cannot do it quickly. They don't know the fishery status for most places. In some places there is systematic monitoring, but I found the scientists didn't collaborate with industry enough, so their information is mismatched. That's different from the West Coast of the US, where the central state government works collectively with NGOs and industry to share information.”



Engaging industry has also been an important part of this strategy.

Bringing industry in as part of the policy discussions helps make sure that policy is feasible and that there is industry buy-in for implementation (five KIIs). One government stakeholder thought the involvement of CSOs in these tri-partite discussions gave added credibility over government-industry discussions alone; CSOs, and the external literature, suggest that industry has a stronger relationship with government than CSOs have (Wu 2017). In the best case scenario, industry has been an ally in promoting sustainable seafood reforms (see case study examples).

## Case Study



Qingdao Marine Conservation Society found resistance in engaging directly with fishers, who were suspicious that researchers would expose bad practices. Engaging processors, who have a relationship with fishers and saw how unsustainable fishing practices would negatively impact their future livelihoods, helped open the conversation with fishers, industry, and civil society. In turn, the processors and fishing associations, who had stronger existing relationships with government than civil society did, engaged with government to emphasize the need for fisheries reform.

Photo: Ocean Outcomes.



Outside of Foundation grantees, CSOs in China have successfully engaged government by offering services complementary to government needs and priorities.

In an environment where space for civil society is closing and sometimes unpredictable, Wu and Chan (2012) found that government sees CSOs as least threatening when they are providing services on issue areas that the government sees as non-threatening and in line with government priorities; those that are not often closely monitored and restricted in their activities. Similarly, Yanyan (2011) found that Chinese NGOs work with the government to implement policies and that NGOs which successfully engaged with government were those led by individuals “recognized as a leader or pioneer in their respective fields” and that had “outward” visions that engaged international stakeholders and donors. This links to the evaluation findings that government at the national level is interested in accessing international best practices. More recent research has had similar findings (e.g. Han 2016).



19<sup>th</sup> National Congress of the Communist Party of China  
Photo: Edmond Tang/China Daily



A person's hands are shown holding a piece of wood, possibly a branch or a piece of bark, against a blue background. The image is overlaid with a semi-transparent blue filter. At the bottom of the image, there are decorative, stylized wave patterns in a lighter blue color. The text is centered on the image.

## EQ 3.8 (China): EFFECTIVENESS

What are CSOs' objectives and how do they align (or not) with Packard objectives?



## Grantee CSO priorities largely align with Foundation objectives.

The Foundation's priorities in China are to increase global knowledge and networks, increase leadership and NGO capacity, increase awareness of ocean issues, and mobilize more donor support, with the theory that increased capacity in these four areas will lead to sustainable fisheries management, responsible aquaculture, and protection of biological diversity (China Strategy 2016).

Grantee CSOs reported their priorities largely aligning with Foundation objectives, focusing on fishery reform, conservation, capacity building, and aquaculture (see graph). The Foundation may have chosen CSOs whose priorities align with its priorities, but data collection provided no reason to believe that the Foundation is driving CSOs to work on objectives that they do not prioritize; rather, grantees say the opposite.

“Only Packard allows us to freely explore what the opportunities are there. Others have strict outputs that you need to do. The Foundation makes me feel that every opportunity is relevant....A lot of times when the Foundation develops a Strategy, they have NGO group discussions to describe the situation and find a solution. But the Foundation's Strategy has been based on extensive conversations with all the people including scientists....You promote an idea and they [give you a grant], but the Foundation sees how our strategy is fitting into that goal.

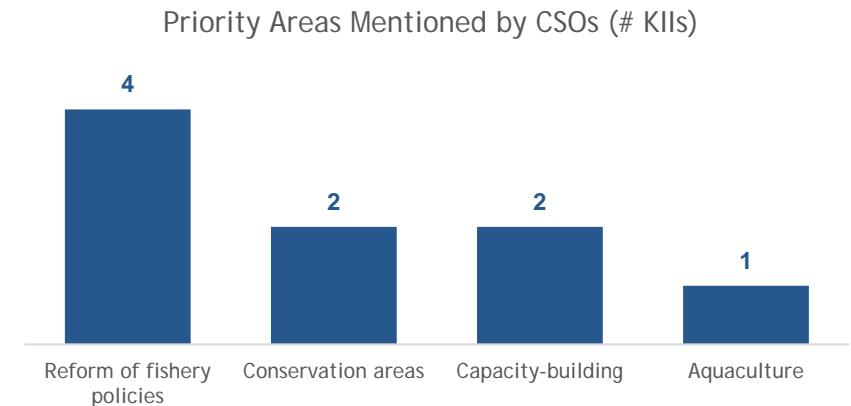


Figure 17: China CSO Priority Areas



Grantees are generally appreciative of the Foundation's open attitude to grantees.

Grantees and other stakeholders spoke appreciatively of the Foundation's making space for grantees to operate flexibly. These included long duration grants guided by non-static outcomes (so grantees can leverage political windows of opportunity), being open with communicating their goals and inviting two-way feedback, providing resources to build executive and administrative capacity through frequent consultation and OE grants. In China, grantees also provided feedback that Foundation staff both “understand the realities on the ground” and invest in learning and hearing from grantees.

“The loyalty part is wonderful. They really do develop relationships with their grantees. Not all foundations are committed to that. They seem very interested in learning, invested in learning and hearing from their grantees and the broader field. Whatever they're doing, they reach out broadly to get input before they do their shift. When they do shift, they are listening.”

Six KIIIs noted the Foundation's positive approach to working with grantees.



Re-granters generally do not appear to share the Foundation's priority on building leadership and NGO capacity, which is viewed as a Western approach.

In contrast with the Foundation's open approach, KIIs took issue with the Foundation's re-granter partners, who take a more top-down approach in terms of dictating grant priorities—in some examples at the micro level, including participant selection for workshops (seven KIIs). Tensions also included high overhead costs and short-term, project-based grantmaking offering little operational flexibility (three KIIs). Some respondents also said that re-granters lacked vision, lacked professionalism, and were focused on brand expansion and implementing programs rather than grantee capacity-building (four KIIs). In one case, re-grantees complained that a re-granter withheld a sizeable portion of the grant until the final report for the project was submitted. Foundation staff subsequently expressed disapproval of this arrangement, which resulted in the reduction of the withheld amount.

Top-down, dictatorial relationships are part of the philanthropic culture in China (three KIIs) and an area in which KIIs pointed out that Foundation co-funding can help build domestic Chinese philanthropic capacity and increase coordination around similar Ocean Strategy goals, including more equitable grantee/granter relationships.

A person's hands are shown holding a piece of wood, possibly a branch or a piece of bark, against a blue background. The image is overlaid with a semi-transparent blue filter. At the bottom of the image, there are decorative, stylized wave patterns in a lighter blue color. The text is centered on the image.

## EQ 3.9 (China): EFFECTIVENESS

What kinds of non-grant support have been most important to supporting grantees?



## Identification of champions and fostering a community of CSOs are the most important non-grant support provided to grantees.

### COMMUNITY AND CHAMPION-BUILDING

Respondents noted a lack of Chinese NGOs in the marine space, and local and provincial government respondents highlighted their growing reliance on NGOs for technical assistance related to implementing national policy changes around marine issues (two KIIIs). To address this gap, the Foundation has prioritized identifying and building champions (four KIIIs) through institutionalizing the capacities of exceptional individuals (as was the case with China Blue).

Both grantee and provincial government officials noted that grantee meetings are helping build a CSO community and encouraging collaboration (six KIIIs). Grantees were interested in continuing such meetings and remarked that without the meetings they would have little idea of what other actors were doing in the space.

### PROMOTION OF FUNDRAISING KNOWLEDGE

Both international and local NGOs noted the 19<sup>th</sup> Party Congress's introduction of a law limiting foreign NGO involvement increased the difficulty of transferring foreign funds into China for grantmaking, such that project implementation necessitated engagement with domestic philanthropies and re-granting organizations (three KIIIs). The Ocean NGO Forum in Hainan was cited as an important event where grantees were able to share information on how to apply for grants and revisit achievements and needs to funders (two KIIIs).



Ocean NGO Forum in Hainan, China

Photo credits: OSF Evaluation Team

“[Packard’s capacity-building approach] is even more effective because China’s NGO world is very nascent. If you see people who are capable and have passion, you need to give them breathing room to grow”

A person's hands are shown holding a piece of wood, possibly a branch or a piece of driftwood, against a blue background. The wood has a rough, textured surface. At the bottom of the image, there is a decorative pattern of stylized waves and bubbles in a lighter blue color.

## EQ 3.10 (Japan): EFFECTIVENESS

What have been Packard's most effective techniques to affect and respond to domestic policy changes? (how we pull organizations together, how we orient them, etc.)



# The Foundation's most effective techniques to contribute to recent fishery reform in Japan through building momentum around issues and engaging important stakeholders in government and civil society.

## BACKGROUND

In 2018, Japan passed a historic fisheries reform bill that expands the use of stock assessments, increases the use of Total Allowable Catch (TAC) quotas, requires recovery plans for overfished stocks, and other reforms needed to improve seafood sustainability in Japan.

Japan also signed the Agreement on Port State Measures to Prevent, Deter, and Eliminate IUU Fishing (PSMA) in 2017, which allows nations to deny foreign vessels entry to their ports if they have evidence of those vessels having conducted IUU fishing.

Prior to the Foundation's entry into Japan, policy makers had some understanding of depleting fish stocks and the need for sustainable seafood (see Figure 18); the 2016 Ministry of Agriculture, Forestry, and Fisheries White Paper on Fisheries notes efforts to improve conservation and move to TAC quotas over total allowable effort models. However, according to KIIs, government support for sustainable fishing practices had no urgency around it until Foundation-funded grantees began to engage regularly with government officials and draw attention to the dire state of Japan's fishing stocks. The success of this engagement had three elements:

### Trends in Production Volume and Output of Japan's Fisheries and Aquaculture

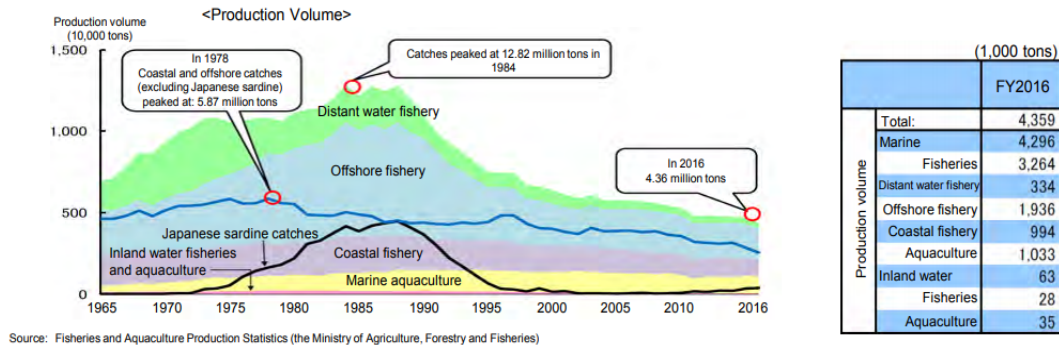
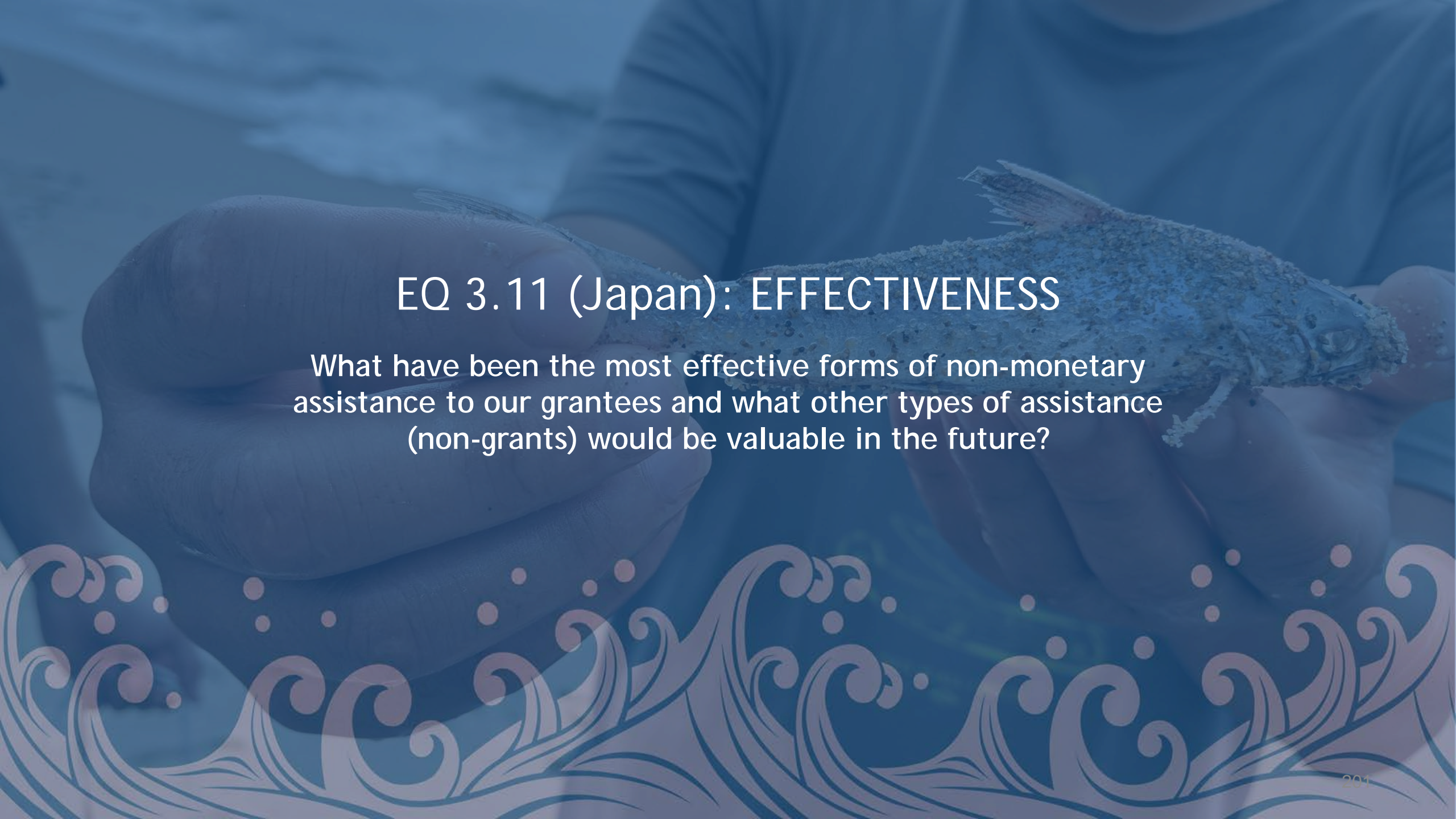


Figure 18: Trends in Production Volume and Output of Japan's Fisheries and Aquaculture. Source: Ministry of Agriculture, Forestry, and Fisheries

- **Regular engagement:** They contributed to building relationships with key government officials and becoming trusted information sources, through understanding policy maker priorities and putting national progress into the context of what other actors had achieved globally.
- **Science-based information:** This gave credibility and urgency to the reforms Packard grantees were advising.
- **Capacity building** with new and emerging NGOs: Because of the dearth of NGOs working on marine conservation in Japan, the Foundation's attention to capacity building and seed support was necessary to bring the civil society actors influencing policy to the conversation (see also EQ 3.11).

These same sets of tools will continue to be relevant in the reform stage, along with engagement on promoting demand for sustainable seafood.





## EQ 3.11 (Japan): EFFECTIVENESS

What have been the most effective forms of non-monetary assistance to our grantees and what other types of assistance (non-grants) would be valuable in the future?



Networks and capacity building have been effective at coordinating messages and will continue to do so in the future as the number of sustainable seafood organizations proliferates.

The IUU NGO Coalition and joint work-planning was effective because it brought grantees together to coordinate and find their individual value-adds (four KIIs). According to KIIs, coordination enabled NGOs to take similar stances on sustainable seafood issues, making their engagement with government more impactful, though some KIIs thought that increasing the frequency of grantee coordination further would be helpful as grantees were meeting less frequently than before.

While there have been recent improvements in the professionalization of the NGO sector in Japan, the NGO community is still in a transition from an oppositional stance and being disregarded by the government to being taken more seriously (three KIIs). One key informant pointed out due to the lack of human resources in-country, the existing talent could easily become concentrated at leading organizations like Seafood Legacy. While Seafood Legacy has flourished, other NGOs in Japan still need ongoing organizational development support.



Donor coordination thus far has been well-implemented and effective at efficiently allocating resources.

The Foundation coordinated closely with the WFF to provide general support grants while WFF focused on project-specific grants for the same organizations (three KIIs), as well as general coordination with other donors including Oceans 5 through the Japan Funders Collaborative. This added efficiency and flexibility to grants enabled co-funding and co-learning through research and evaluation products such as the Global FIP Reviews and the ongoing GSM Evaluation.

As donor funding increases in Japan, there is a danger that funding could outpace existing NGO capacity or that coordination could decline (three KII). This includes the entry of new donors; some key informants were concerned that as new foundations entered Japan, the risk of work not being coordinated to find common goals and efficiencies increases. To address this risk, they advised continuing to facilitate donor coordination bodies and proactively reaching out to donors entering Japan to work on sustainable seafood.



## EQ 2.7 (USA): INTEGRATION

Is the US Strategy sufficiently integrated/coordinated with the IUU, Climate and Science Strategies?



# The US strategy integrates climate in its stated outcomes and has climate adaptation mainstreamed in its grants, though grant priorities shifted away from climate change following the emergence of Federal Response as a priority.

Outcome	Organization	Name	Grant Description	Funding
By 2021, an integrated understanding of climate change impacts on West Coast marine ecosystems is reflected in fisheries policy discussions and research priorities.	Ocean Conservancy	Fisheries + West Coast leadership	to advance national, West Coast, and California fisheries management	\$1,200,000
	Point Blue Conservation Science	Ocean Research and Management Prioritization	to support stakeholder engagement in prioritization of ocean conservation issues on the West Coast of the United States	\$30,000
	The Nature Conservancy	West Coast Climate Change and Communities Initiative	to support the West Coast Climate Change and Communities Initiative	\$250,000

The US Strategy acknowledges that climate change will continue to grow in severity. It is the only Country Strategy that identifies climate change related outcomes. These are:

- By 2021, state managers have articulated science-based principles and taken actions that demonstrate effective approaches to prepare fisheries and associated communities for climate change, and that serve as a model for other management contexts.
- By 2021, an integrated understanding of climate change impacts on West Coast marine ecosystems is reflected in fisheries policy discussions and research priorities.

The Strategy included \$1 million of co-funding and coordination with the Science sub-program to address these outcomes. The current US Marine grants supporting the second outcome, according to the Foundation’s 2019 MEL data, as detailed on the table to the left. The first outcome was not linked to any grants in this dataset. This is in keeping with reported shifts within the US portfolio to direct resources toward a Federal Response defending environmental policies against rollbacks following the 2016 US election.

Table 17: Illustrative Climate-Integrated US Marine Grants



## Co-funding with the Science sub-program is appropriately articulated to support US Strategy objectives.

### The US Strategy collaborates with the Science sub-program on four outcomes:

- By 2019, the viability of data-limited methods for fisheries management has been implemented in California and builds momentum for broader uptake.
- By 2020, groundwork will be laid for Oregon's 2023 MPA program evaluation and California's adaptive management process to help ensure the framing of evaluation objectives and priorities are science-based.
- By 2021, California state managers have articulated science-based principles and taken actions that demonstrate effective approaches to prepare fisheries and associated communities for climate change, and that serve as a model for other management contexts.
- By 2021, an integrated understanding of climate change impacts on West Coast marine ecosystems is reflected in fisheries policy, discussions, and research priorities.

Two of these are also climate change-related outcomes outlined on the previous slide. Except for the last, these outcomes are no longer reported on in Packard's FLUXX system, according to 2019 reporting. Related DLM and effective fisheries management grants from the Science and US portfolio are in the table on the next slide. These are grants linked to outcomes in FLUXX and may not be comprehensive; for example, Resources Legacy Fund conducts activities related to DLM.



## Co-funding with the Science sub-program is appropriately articulated to support US Strategy objectives. (Continued)

Outcome	Organization Name	Grant Description
By 2021, an integrated understanding of climate change impacts on West Coast marine ecosystems is reflected in fisheries policy discussions and research priorities.	Ocean Conservancy	Fisheries + West Coast leadership
	Point Blue Conservation Science	Ocean Research and Management Prioritization
	The Nature Conservancy	West Coast Climate Change and Communities Initiative
By 2019, Foundation-funded DLM tools are written up in scientific literature.	California Environmental Associates	DLM Convening
DLM: Pilot examples of use of these tools in high profile areas: WP, California, Marine Stewardship Council	The Nature Conservancy, Resource Legacy Fund	DLM Convening
By 2021, California and Oregon MPA systems are effectively managed and monitored, appropriately resourced, and are equipped for long-term durability.	Oregon State University	Pi
	Oregon Community Foundation	Oregon Ocean Conservation Fund, for a donor-advised fund that will be used to support organizations throughout Oregon that are focused on marine conservation
	The Nature Conservancy	Oregon Marine Reserves, for management and scientific research at Oregon's marine reserves

The Science sub-program focused relatively less on climate change, one of the main planned areas of integration with the US, following a board decision to instead divert some resources to Science and Society programs. Similarly, the US Strategy reallocated resources and priorities in 2017 during the development of the Federal Response.

Table 18: Illustrative US Marine-Integrated Science Grants



## EQ 2.6 (Mexico): INTEGRATION

Is the Mexico Strategy sufficiently integrated/coordinated with the IUU and Climate Strategies?





The Mexico Strategy supports many activities that indirectly contribute to IUU challenges and takes an approach combatting IUU in keeping with the Foundation's broader IUU framework, indicating a sufficient level of consistency and integration in approach.



Photo: Fish and Information Services 2019.

The Mexico Strategy acknowledges that IUU is a major factor affecting fisheries management in Mexico, resulting in a loss of over \$200 million USD annually. KIIs outlined the IUU-related challenges, central of which is a lack of Comisión Nacional de Acuacultura y Pesca (CONAPESCA) capacity and resources to address IUU factors, in addition to many regulatory gaps. These weaknesses make it very difficult for CSOs to productively address IUU directly.

The Foundation seeks to address IUU in Mexico in indirect ways which include helping improve the development and enforcement of the regulatory framework for sustainable use of the country's coastal-marine resources, building capacities in the public and CSO sector, and helping to develop shared visions among stakeholders (see EQ 3.12). While these approaches are not directly articulated as such in the Mexico Strategy documents, the consistency of approach with the Foundation's IUU Framework indicates sufficient integration. The ET did not identify any high reward missed opportunities.



## Current integration with climate change is limited to research initiatives with the Science sub-program and insufficient to the emergence of climate change as a priority threat.



“Climate change in Mexico is a ghost - it doesn't exist. Nobody pays attention to climate change. Adaptation, mitigation is just not happening. I don't know if we could be doing more on climate change for the better management of the oceans. There's no - to my knowledge - no central strategies that include mitigation, adaptations, or climate change activities regarding the oceans.”

Photo: Paula Ezcurra (2015): A first look at blue carbon storage in Mexican desert mangroves. DataMares. InteractiveResource.

Climate change was one of the main threats to biodiversity identified the Evaluation of The David and Lucile Packard Foundation Gulf of California Subprogram (Foundations of Success 2011). In KIIs, respondents also indicated that they saw climate change as an important threat facing Mexico and its marine environment, though the issue is not highly visible in the country.

The current Mexico Strategy does not explicitly address climate change. The Science sub-program has coordinated work in Mexico related to blue carbon, including a blue carbon and red mangrove assessment. The assessment addresses two issues: 1) wetlands preservation "as a natural climate solution" by creating and disseminating a visitor best practice guide for Ramsar wetlands to tourist hubs and government officials and 2) a Blue Carbon project consisting of conducting scientific studies to quantify mangrove carbon stocks and sequestration rates, providing technical assistance to SEMARNAT (Secretariat of Environment and Natural Resources) to expedite approval of mangrove protections, engaging students and communities in mangrove cleanups and service activities, signing a general collaborative agreement with CONANP leadership through 2024, and broadcasting multimedia national mangrove conservation priorities and Blue Carbon potential to an audience of 50 million. This work has not yet been tied to other grantee programmatic work on fisheries and policy.



## EQ 3.12 (Mexico): EFFECTIVENESS

How effective have Packard's efforts been in addressing of small-scale fisheries IUU?



The Foundation's efforts to address IUU have effectively promoted the availability of catch monitoring data that make small-scale fishing more traceable and transparent.

Though IUU is not explicitly one of the Mexico Strategy goals, grants under the strategy work on elements important to curbing IUU – as identified in the CEA white paper on IUU and the Foundation's IUU logframe, including transparency, traceability, management, and enforcement.

### THE INDUSTRIAL AND ARTISANAL FISHING FLEETS

Fishing in Mexico is carried out with industrial and artisanal vessels. Between these two kinds of boats there are important differences in equipment, fishing gear, and target species, which results in different catch volumes and economic gains.

Source: data on fisheries production from the National Commission of Aquaculture and Fisheries (CONAPESCA) for the period 2006-2014. Does not include data on lagoons and rivers. Statistical yearbook 2006-2013. ROUND FIGURES AND ANNUAL AVERAGES. T = TONS

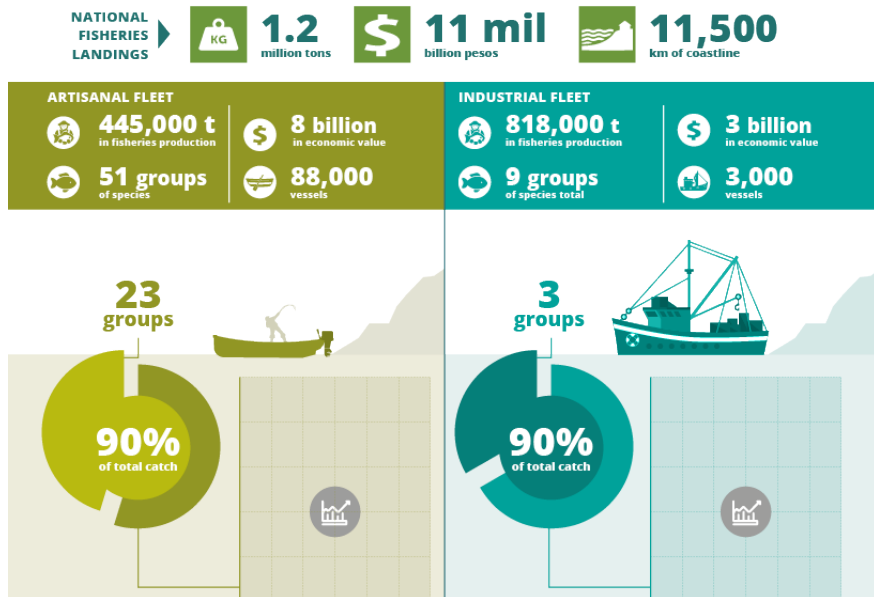
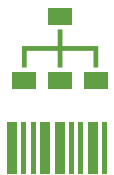


Figure 19: The Industrial and Artisanal Fishing Fleets in Mexico. Source: DataMares

Two grantees work on monitoring and database compilation to improve transparency and traceability in fisheries:

- dataMares compiles fishery databases which allows fishers to see how their catches compare to quotas and regulations, and which CONANP can use for regulation and monitoring. Though there was early resistance to this process, making the data collection transparent helped with buy-in.
- The Monitor Noreste database has metadata that CSOs and government can use for MPA management monitoring.

Grantee interim and final reports report that these, coupled with government capacity building, have resulted in robust databases which government is using.



Improved fishery management plans at specific fisheries has a high potential to improve their traceability, though it is still early to judge effectiveness.

Several Foundation grantees work on improving fisheries management to improve traceability. Successful tactics grantees have used in securing fisher willingness to participate include working to add economic value to the fisheries through improved quality, designing programs to account for fisher priorities, and building small-scale fisher capacity.

Though all of these efforts are still underway, their models adhere to best practices of community engagement, capacity building, and government engagement.

## Case Study



EDF is currently working with a new hake fishery in the Gulf of California to develop science-based management practices. This includes a technology-based fishery monitoring mechanism, for which they are currently figuring out the most efficient model. EDF has found that the small-scale fishers with whom they work are willing to embrace change. Over five years, the fishery has gone from no use of science to yearly stock assessments.



## Application of laws and regulations pose a significant challenge to the progress and effectiveness of the Mexico Marine Strategy.

### IUU Fishing Index



Source: IUU Fishing Index

One of the Foundation's grantees working in governance and enforcement is DAN, which launches legal challenges to projects threatening Mexico's environment. Significant successes include a ruling that the Ministry of Agriculture was not following its six-year plan for sustainable fishing. More broadly, DAN works to build capacity within regional government through legal advice.

Wider-spread application of laws and regulations remains a challenge that grantees warn undercuts progress in transparency and traceability. An estimated half of fishing in Mexico is IUU (Cisneros- Montemayor et al., 2013), and Mexico ranks as the 14<sup>th</sup> worst country for IUU out of 152 (IUU Fishing Index). In 2019, NOAA highlighted Mexico as one of three countries having made little progress in preventing IUU fishing. These are often happening outside the realm of small-scale fisheries. For example, demand in China for the endangered totoaba fish means that totoaba in Mexico are illegally fished and exported through criminal cartels (Klls, Mendez 2016). Grantees report that the change in government has further challenged enforcement.



## EQ 2.5 (Chile): INTEGRATION

Is the Chile Strategy sufficiently integrated/coordinated with non-philanthropic donors/funders?



The Foundation is supporting an emerging funders collaborative among philanthropic groups, but this effort is still at an early stage and has not yet yielded strong integration with non-philanthropic funders.

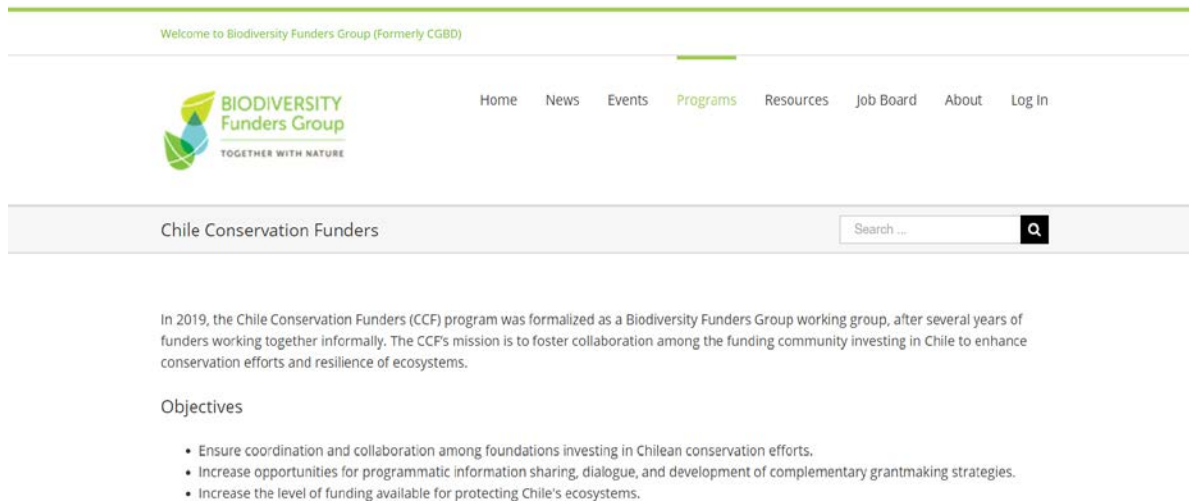


Photo: Biodiversity Funders Group

The Foundation coordinates closely with the WFF and the Marisla Foundation in Chile. As other philanthropic donors have gradually stepped into financing ocean and marine conservation projects, the Foundation is exploring ways to improve communication among different foundations to reduce duplication and help bring more coherence to the sector. The Foundation is also exploring other mechanisms for long-term financing such as supporting the implementation of a 2016 law that provides incentives for private conservation easements.

However, the Foundation has not yet worked significantly with other multilateral and bilateral donors. The Foundation did help spearhead the development and coordination of a Chile funders group, now formally within the Biodiversity Funders Group. This initiative is in its early stages, though this approach has been successful in the Foundation's other focal countries (see EQ 2.2, 2.4, 3.2), and may increase opportunities to work with non-philanthropic donors.

Some respondents indicated that the Foundation's priorities in Chile are currently mostly based on information they get from their network of organizations, which is not very broad yet. Respondents recommended a broader survey of actors and priorities in Chile, which may also illuminate further potential partnerships.





## EQ 1.7 (Science): RELEVANCE

What have been the most effective models the Science team has used to build capacity across OSF Country/Global Strategies?



## The Science sub-program's role in supporting Ocean teams.

While Ocean teams routinely develop scientific knowledge and products according to their individual strategy needs, the Science sub-program invests in scientific knowledge, insights, and tools that can be integrated across multiple Strategies, but which do not yet fit into their existing frameworks, or are too resource-consuming for any one team to explore. The Science sub-program's functions can be categorized as:

- 1) **Instrumental:** using science as a tool to measure a number or metric to be used in decision-making (e.g. developing metrics for a monitoring system);
- 2) **Strategic:** using science to reframe strategic tradeoffs or provide backing for a strategic outcome (e.g. demonstrating how economic analysis can reframe the debate around policy changes in Indonesia); or
- 3) **Conceptual:** using science to change the way issues are framed or discussed (e.g. linking management of climate risks to outcomes in fishing stocks)

The Science sub-program serves an important role in the Ocean team by both anticipating value-adds across multiple Strategies and being adaptive to address issues for Strategy teams as they emerge.

The Ocean Director also plays an important role in supporting Ocean teams by regularly coordinating with the Science sub-program to collate science-related needs across different strategies and by commissioning reports that make additional scientific resources and information available to Ocean teams, Foundation grantees and the public. For example, the OSF is supporting the University of British Columbia to surface open access information on fish catch, location and effort.



## EQ 3.13 (Science): EFFECTIVENESS

Under what preconditions have internal and external stakeholders been able to most benefit from Science investment? (What are the appropriate levels and interactions of knowledge sharing/etc. What leads to use?)



Science sub-program investment offers the most benefit when directly engaging users to determine knowledge needs and project design, often through heavy engagement.

For Science grants, the major precondition for engagement is a need is to align information to stakeholder needs through consultations or direct involvement, developing a “clear pathway to impact” (three KIs).

Use examples include FishPath (TNC/SNAPP) being piloted with MSC and Fair Trade after a collaborative process (Fish Path fact sheet 2016) and the Ocean Modelling Forum’s work with the Pacific Fisheries Management Council to identify useful scientific products.

## Case Study



Photo: Ocean Modeling Forum Fact Sheet, Pacific Herring

The Ocean Modeling Forum was organized to explore action-oriented approaches to convening, organizing, and generating information for use in fisheries management decision-making. The approach relies on knowledge co-creation by scientists, industry and community stakeholders and direct engagement with decisionmakers through working groups.

The impact of climate on small indigenous communities whose fisheries are locally-based and spread across the Pacific coast was not well-understood, and existing stock assessment models were only useful to commercial fishers. The Forum assembled experts in climate and fisheries, social experts on measuring community wellbeing ecosystem services, First Nations community representatives and business interests in British Columbia and Alaska.

By combining multiple methods in a new stock assessment model, the Forum generated a scientific product to allow for the same data from across the Pacific coast to be modeled and assessed to derive social and cultural costs/benefits for isolated indigenous communities. Since the community, industry, and Council stakeholders were engaged throughout knowledge creation, the Forum’s approach ensured the information generated was useful and ultimately used.



## Use of science and research with government has contributed to changes in policy.

There is widespread evidence that the Foundation's investments in science are beneficial. These are described throughout the report, but are especially true of government preference for science-based policy (China, Indonesia, Japan) and use of economic data for policy and industry engagement in the US and Indonesia. (See EQ 3.0, 3.1, 3.5, 3.6, 3.7, and 3.10.)

While most of these achievements were not linked directly to the Science sub-program, they do provide best practices on what has led to use:



Using data to **demonstrate the benefits** of recommended policies, particularly the economic benefits (as in Indonesia and China) or the urgency of the policy (as in Japan).



Tailoring research priorities to what the **government needs**, as in China and Indonesia.



**Working closely with key decision-makers** and implementers through secondments or frequent meetings, as in Indonesia, the US, and Japan.

The background of the slide is a photograph of a harbor filled with numerous wooden boats. Many of the boats are covered with blue or green tarps. In the background, several flags are flying on tall poles, including the Indonesian national flag (red and white) and a blue flag with a white emblem. The scene is set against a clear, light blue sky. The entire image has a semi-transparent blue overlay.

## EQ 4.3 (Science): EQUITY

How has the Science sub-program addressed equity issues in itself and assist other Programs and Strategies in addressing these?



The Science sub-program supported defining an equity framework for the Foundation and the Ocean Team, but this work has not been fully institutionalized, and it is too early to fully evaluate the effort.

The Science sub-program funded the PolicyLink study that outlined areas for the C&S Program to explore. This report identified seven areas for C&S to consider exploring, and recommendations on how to operationalize equity within C&S. Since then, the Foundation has begun to make changes such as:

- Ocean staff are visibly making a shift toward incorporating more equity thinking in their discussions. All interviewees within Packard expressed support for further integration of DEI into the work. Many identified a historic tension between conservation goals and social equity goals (KII).
- The Ocean Team's research and learning partner, CEA, conducted a DEI presentation for the Foundation in 2019 outlining existing frameworks the Foundation can use in its thinking, which has influenced the way the Ocean team is discussing DEI (KII).

During fieldwork, internal initiatives to act on the PolicyLink recommendations were under development and had not fully rolled out yet, so there has not been full opportunity for Programs and Strategies to incorporate the Science sub-program's work on equity into ongoing operations.

## Cross-Cutting Themes

Each evaluation question section ended with summary conclusions, but a few conclusions cut across the evaluation questions and are major themes throughout this report. These are:

- **Climate change is a crucial issue** to marine conservation that the OSF portfolio is currently addressing in a minimal way.
- **Non-grant resources have been important** in promoting external integration and grant efficiency with other donors, internal integration among grantees, and building grantee capacity.
- While **the Foundation has consistently coordinated with other foundations** in its focal countries and on its global strategies, **coordination with multilaterals has been much less**. Multilateral organizations are important stakeholders in marine conservation because of their work across country boundaries.
- **Capacity building, generation and dissemination of scientific knowledge, and close work with government decision-makers have been important** across focal countries and Global Strategies to making effective, durable, and relevant change.
- While tactically these approaches have been successful, **progress toward longer-term outcomes has been slower**. The fishery-by-fishery approach followed so far is most likely approaching a point of diminishing returns and is not targeted at the broader ecosystem.



# RECOMMENDATIONS



## Recommendations

The ET presents the following recommendations in order of priority, with Recommendation 1 being the highest priority. In addition, each recommendation is assigned a confidence rating of high, medium, and low.

The high-rated recommendations tend to reflect operational considerations, where the team had extensive interviews to draw on as well as desk review where relevant.

The medium-rated recommendations are more often for strategic-level recommendations, and are more reflective of the ET's secondary literature review, where the knowledge is still evolving, and the ET's expertise. These issues had enough evidence to merit attention but will need groundtruthing within the Foundation.

The low-rated recommendation included is based on interviews and literature review, but a review of the same information could reasonably lead to a different direction depending on the Foundation's strategic priorities. The ET otherwise avoided including recommendations in which we had less confidence.

## Recommendation 1: The Foundation should adopt a more comprehensive approach to issues related to DEI including:

Incorporate measures of human and social outcomes in grants and Strategies, including gender, wherever applicable to better incentivize and measure distribution of gains or harms. This will allow the Foundation to better understand where its work is or is not producing positive and negative equity results (EQ 4.0).

Sensitize grantees to the Foundation's emerging focus on DEI. This will likely take shape in different ways with different partners. Some grantees are advanced in their thinking on DEI and can contribute to the Foundation's DEI thinking; other grantees are eager to receive guidance from the Foundation in how to better think about equity; and still others are not sure what equity means or how it is relevant to their programs (EQ 4.0).

In developing the Foundation's approach to DEI, consider the extent to which community and underrepresented groups should be consulted and/or engaged in planning and design of strategy and different types of grants. This will allow the Foundation to set a standard practice and targets for such inclusion, as well as to expand its awareness of how its work intersects with contextual equity (EQ 4.0). Consider the role of power in engaging with communities and grantees, particularly the power differences between grantees, and between community and underrepresented groups and the Foundation.

**Recommendation 2:** The Foundation should regularly assess the OSF’s potential for unintended, long-term risks to local populations and explicitly consider how to mitigate these risks.

Integration with global markets offers valuable opportunities for populations to better their livelihoods and grow their local economies. However, these ties can carry heightened vulnerability due to unintended consequences stemming from market shocks. In some instances, the Foundation promotes local specialization in one or a few related commodities that could undermine the resilience of local communities under conditions of market shocks. Long-term market trends may also result in nutritional deficiencies in tropical, seafood-exporting countries.

The Foundation should incorporate measures to assess, monitor, and mitigate these market-related risks in its Country and Global Strategies. One method of doing so is helping local communities to diversify their market, new domestic or regional markets with more diverse commodities are likely to be more resilient to market shocks and be more consistent with long-term nutritional deficiencies in the Global South (EQ 1.6).

**Recommendation 3:** The OSF team should develop a strategy that guides the Foundation’s contributions to the evidence base, methods, capacities, and institutions to manage and adapt fisheries, biodiversity conservation, and aquaculture to climate change and ocean acidification.

We are only beginning to understand the extent to which climate change affects widespread change in the oceans, but the existing knowledge base is sufficient to start planning for it. The ET recommends the Ocean team explicitly strategize for and support capacities around addressing climate change and ocean acidification. Evidence indicates that sound fisheries management and management of MPAs are key to their resilience. There is also evidence that fish stocks are responding to climate change by changing size and moving to different geographies. These factors are likely to impact areas of the Foundations work, to require changes in regulations (e.g. around minimal size policies), and to affect current arrangements to administer fisheries. Shifts in stocks are likely to impact countries in different ways, some countries will benefit while others will loose from this shifts. This shifts will also require robust institutions to address transboundary ocean concerns. (EQ 1.0, 1.2).

## Recommendation 4: The Foundation should explore opportunities to catalyze a broader global approach to GSM transformation, with an expanded focus on Asia and consolidation of progress in North America, Europe, and Japan.

The OSF ET concurs with the GSM Evaluation recommendations presented on page 85 (Ross Strategic et al. 2020:85), particularly that “While the Foundation’s GSM strategies have enabled substantial progress on the journey to sustainable seafood market transformation to date, they have been insufficient to achieve the foundations’ goals thus far. Additionally, continuing with the current approach potentially could drive transformation of the supply chains serving North America, EU, and possibly Japan, but that would be insufficient to achieve transformation of global seafood markets overall. Accelerated “shifts” in strategic focus for the GSM movement are needed to get out of the trajectory of making incremental progress toward market transformation.”

### Strategic Focus Area 1:

Maintain strategic efforts to fully realize and consolidate progress in the North American, European, and Japanese markets and in the key GSM tactics that the foundations have invested in to-date. Continued attention to North America, European, and Japanese market transformation remains important to sustain and increase engagement of a critical mass of industry, government, and civil society stakeholders in driving focus, norms, and collective action on advancing responsible practices and sustainability in global seafood markets.

### Strategic Focus Area 2:

Explore opportunities to catalyze a broader global approach to GSM market transformation, with an expanded focus on Asia. In accelerating this shift, priority attention should be on industry engagement and enhancing GSM connections with governance and policy reform efforts. Strategic work in these areas can lay a clearer foundation for bringing new geographies up the market transformation curve more quickly (building on and adapting approaches used in current focal markets and forging new innovative models where needed) to support global progress toward Phase 4 market transformation.”

(Ross Strategic et al., 2020:85)

## Recommendation 5: The Foundation should more intentionally plan for durability and scalability in its intervention strategies.

To ensure the Foundation's project results are durable, Ocean teams should consider integrating more explicit pathways and strategies for the scalability of their work from inception of initiatives. These strategies should continue to focus on demonstrating the relevance and benefits of models or innovations, but also clearly delineate how the scaling is expected to take place by defining the:

- Changes, and their timing, which need to take place during the intervention for scaling to take place
- Levels at which changes need to take place (i.e. local, national, global)
- Commitment necessary from stakeholders that must be engaged at the different stages and levels,
- Necessary financial and technical resources required to scale;
- External conditions necessary for scaling; and
- Ways to monitor progress and contextual factors that might require adjustments of the strategy.

To ensure the durability of project results and to build capacities around addressing transboundary maritime concerns, the Foundation should explore the feasibility of collaboration with organizations that have developed lasting partnerships with governments or intergovernmental mechanisms to address coastal and maritime issues: such as PEMSEA or the UNDP-GEF Small Grants Program (EQ 5.0, 1.0, 1.2).

**Recommendation 6:** Given the Ocean teams' increasingly complex work, limited staff resources, and low level of Foundation work in aquaculture, the Ocean teams should reassess OSF-wide engagement and targets around aquaculture.

The Foundation recognizes advances in sustainable aquaculture will be important to meet the global demand for seafood, to reduce pressure on capture fisheries, and to prevent practices that are harmful to wild species and habitats. According to program teams, an Ocean-wide focus on aquaculture is planned for once improvements are realized in fisheries work. Yet emerging confounding factors affecting fisheries are increasing the complexity of the Foundation's existing programming. These increase the workload of the Ocean program's lean staff whose capacities are already strained. The Foundation should assess where its work on aquaculture is likely to have the highest impact (likely China) and focus aquaculture activities only in those geographies rather than rolling it out more broadly. The opportunity cost of engaging in aquaculture more generally could impact the Foundation's ability to respond to other needs, including capacities and governance frameworks in Global South (particularly Asia) sustainable fisheries and seafood markets; increasing attention to human rights and DEI issues in global fisheries, and mitigating emergent risks of global market integration to local societies and economies.

The OSF's 2030 aquaculture target indicates that more than half of seafood from the most damaging forms of marine aquaculture will come from countries with responsible management policies and regulations in place. The OSF also indicates that the work on aquaculture would reflect the highest-reward opportunities and take into consideration staff capacity and limited resources. Considering the growing complexity of the challenges faced in fisheries and biodiversity conservation, should the Foundation maintain its OSF-wide focus on aquaculture, it should revise the targets in these other areas (EQ 1.3).



## Recommendation 7: Staff workloads and resources should factor into decisions surrounding integration, collaboration, and implementation.

In the last five years, integration has taken place in the Ocean teams in two general ways: First, the gradual alignment of the work of the various teams with the objectives of the OSF, which took place through the joint formulation of the OSF and the subsequent refreshing or creation of the different teams' strategies. This has had a high payoff of alignment and complementarity of strategies. The second way in which integration has taken place is through collaborative work among teams on specific topics. This has focused on opportunities to capitalize on complementarities and has produced results that are substantively different than those which could be obtained by just one team. Both approaches, however, have implied considerable time investments by staff. Further formal integration of Foundation work is likely to place increasing demands on a staff that is already heavily burdened, and it would require careful consideration of the tradeoff and the potential for diminishing returns (EQ 2.1, 2.3).

The ET recommends that the Foundation place emphasis on completing the Strategies that are yet to be finished. This coupled with monthly meetings and the help of the OSF Director could ensure that the work of Strategy teams remain consistent and complementary. Any additional formal collaboration among teams (or collaboration with other programs) should be assessed in terms of its importance compared to existing work carried out by the team and should consider the demands on staff that the additional work would require. If there are no additional resources and the collaborative work is deemed more important, existing work should be reassessed. One criteria could be the extent to which the collaborative work can substitute work already carried out by the team. For example in the case of leadership capacity development, if the results of working with OE are deemed of higher quality and lower burden for staff than their current capacity development activities, the former should substitute the latter (EQ 2.1).

## Recommendation 7: Staff workloads and resources should factor into decisions surrounding integration, collaboration, and implementation. (Continued)

The Foundation should consider paying particular attention to 1) the extent to which the workload of teams that manage two Strategies are properly staffed; and 2) the composition and resources dedicated to the China Strategy. As the Foundation's work in China has progressed very rapidly and is now approaching the levels of engagement of a fully fleshed out Strategy (and given that China is the highest producer and consumer of seafood in the world), this country is critical to the OSF and requires its own PO and team comparable to those of other Country Strategies.

## Recommendation 8: The Foundation should make more explicit the role of financial conditions in the achievement of the long-term goals of the OSF.

The Foundation should consider making explicit the role of financing in enabling achievement of the 2030 OSF goals. While the OSF does not explicitly include financing among its key enabling conditions, in practice support to financial conditions takes place in many different forms across the teams' work. These include the participation and leadership in funder collaboratives, working with investment funds, engagement to influence investments of multilateral and bilateral organizations, engagement with industry in financing FIPs, contributions to conservation funds, and the use of the Foundation's voice to raise the profile of ocean concerns across the philanthropic community.

During the development of the OSF, the Foundation originally considered financing as one of the key enabling conditions to achieving the OSF goals. Financing was subsequently omitted under the assumption that the preconditions for finance to function, stable and foundational governance, were not yet in place. However, these preconditions are not limiting to the entire range of the Foundation's work. For example, with respect to MPAs, Mexico, Chile, and Indonesia have set aside large portions of the sea under different forms of protection, but very little budget has been set aside for their management, hindering results. Similarly, when addressing small fisheries, there is frequently a need to develop and test the appropriate models to access financial resources (Kheil et al. 2013). Examples of Foundation work that address such issues are the support provided to FMCN to create a thrust for the management of protected areas in Mexico and the Foundation's support through China Blue in the development and promotion of insurance business models appropriate to small fish farmers in Hainan.

Including finances as a key enabling condition in the OSF or Theory of Change would better communicate the Foundation's work (including non-grant support). It would similarly call further attention to a key factor hampering the achievement of conservation objectives, and under conditions in which market instruments have limited applicability (EQ 1.3).

## Recommendation 9: The Ocean teams should further prioritize efforts to foster integration and complementarity among grantees.

One of the Foundation's major challenges is ensuring that grants to widely diverse organizations can contribute to a common set of objectives. One method is through the development of Country and Global Strategies and by using these Strategies to guide the development of the of grant portfolios, which the Strategy Teams are doing. Targeted programs and activities to foster grantee integration have also proven to be particularly valuable.

Among the options for grantee integration, the Ocean team should give high priority to supporting organizational development programs like the Pescadero Program that help organizations develop capacity to work together toward common goals, build relationships among cohorts of leaders, and strengthen their management and fundraising capacities (EQ 2.1, 3.1). As indicated in Recommendation 6, the OSF Team should consider substituting collaborative work with the OE program.

The Foundation should continue activities that build common orientations and coalitions among their grantees, which have resulted in benefits in the numerous countries the Foundation works in (including the US, Mexico, and Indonesia). This includes enabling grantees to rapidly work together to respond to changes in government positions on environmental issues and to develop common guidelines on best practices. (EQ 1.1, 2.1).

**Recommendation 10:** As the Foundation engages with more diverse stakeholders and fosters complementarity among its existing grantees, Ocean teams should prepare to assume a more proactive role in facilitating collaboration among grantees.

As the Foundation adopts strategic approaches that require joint planning and implementation by different grantees, POs will need to engage with grantees to identify and consider the trade-offs of collaboration, including potential tensions that can disrupt collaborative work (EQ 2.3).

In China, the Foundation needs to work closely with re-granters to build re-granter capacity for mentoring and working collaboratively with grantees. This is an opportunity to make re-granter and grantee relationships more productive and to share some of the Foundation's best practices (EQ 3.8).

## Recommendation 11: MEL Systems

The process of conducting this evaluation highlighted a few additional recommendations regarding the use of MEL systems. Attention to these areas could support enhanced evidence-based decision making moving forward, particularly if they are done at the outset of grant and strategy work.

Categorize indicators and grants against the OSF outcomes and approaches to be able to better measure and analyze progress against the Theory of Change.

Integrate grantee-level progress indicators into the database to better enable reporting on grant contributions toward change.

Articulate Theory of Change assumptions to better enable evaluation of their validity in the future.



ADVANCING DEVELOPMENT EFFECTIVENESS

## About Social Impact

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