

Final Ocean Strategic Framework Evaluation Report Executive Summary

July 23, 2020



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.

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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.

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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.

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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.

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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.

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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

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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 KIs 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 KIs 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

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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.

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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.

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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.

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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

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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 technical competencies and respondents noted local organizations are in further need of capacity building.

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?

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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.