



WESTERN FLYER
FOUNDATION

Strategic Plan

2024 - 2026



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Photo credit: Martha Heasley Cox Center for Steinbeck Studies, SJSU



Summary

Background

In 1940, writer John Steinbeck and marine biologist Edward F. Ricketts chartered the sardine purse seiner the *Western Flyer* for a six-week trip to Mexico's Gulf of California, resulting in the co-authored text *Sea of Cortez* (1941) and, ten years later, the narrative portion of the work, Steinbeck's *The Log from the Sea of Cortez* (1951). Their story of intertidal collecting, philosophical rumination, and travel made the *Western Flyer* an icon, a symbol of a creative and enduring bond between writer and scientist.

After the expedition, the *Western Flyer* spent years as a fishing vessel, changed names and owners, sank, and was almost beyond repair when marine geologist John Gregg purchased it in 2015. Inspired by the legacy of Steinbeck and Ricketts, he launched the Western Flyer Foundation to restore the iconic boat and return it to service as a platform for research and education.

Between 2016 and 2023, the Western Flyer Foundation (WFF) worked with shipwrights, craftspeople, and marine experts in Port Townsend and Seattle, Washington, to restore the *Western Flyer*. The goals for the restoration were to replicate the historic look and feel of the 1937 boat, maximize the use of sustainable wood, incorporate a hybrid diesel-electric engine, and equip the vessel with a state-of-the-art research lab. The WFF documented the restoration in a series of popular YouTube videos that reached hundreds of thousands of viewers. In April 2023, the tremendous restoration effort was acknowledged when the *Western Flyer* received a prestigious international Classic Boat Award.

In preparation for the vessel's return to Monterey Bay in November 2023, the WFF Board and staff spent several years developing and piloting educational programs, participating in community outreach events, and establishing important partnerships with universities, government agencies, schools, nonprofits, foundations, and businesses. Among the highlights were:

- Co-sponsoring Monterey's Cannery Row Days for four years with the Monterey Public Library and Cannery Row Company, including a month-long online Steinbeck book discussion, in-person events celebrating the town's history and ecology, and local history slams for residents and students.
- Donating over 6,400 meals through weekly food drives in Castroville during the COVID-19 pandemic.
- Piloting popular Science Illustration and Nature Journaling programs, which reached over 1,500 students, 25 educators, and 20 local schools between 2020 and 2023.

- Partnering with Stanford University and the Naval Postgraduate School (with funding from the Office of Naval Research) to develop a STEM program that introduces post-secondary students to careers in ocean and atmosphere sciences.
- Hiring a team of experts to lead the organization’s programs and operations, including an executive director, education and science managers, and a boat captain.
- Organizing the November 4, 2023, return of the *Western Flyer* to Monterey, a weekend celebration that drew thousands to the Monterey Harbor to greet the boat. Local political figures welcomed the *Western Flyer*, and some visitors waited in line for more than an hour to step onto the historic vessel. Publicity about the boat’s return was international in scope.

Goals and Next Steps

The next three years will be pivotal for the Western Flyer Foundation as we shift our primary focus from restoring the vessel to implementing onboard research and education programs, expanding our land-based education and outreach programs, and strengthening our financing, governance, and organizational infrastructure. We will solidify our community presence throughout the Monterey Bay region through innovative programs and by securing berthing, classrooms, and office space in Monterey. Simultaneously, we will organize the vessel’s return to the Gulf of California and strategize future trips to West Coast port communities. All the while, we will increase the visibility of the Foundation and the compelling story of the *Western Flyer* through robust educational programs and outreach.

The Western Flyer Foundation will focus on the following strategic goals from 2024 to 2026:

- ① Outfit, protect, and maintain the historic *Western Flyer*.
- ② Deepen our scientific understanding of the ocean.
- ③ Stir curiosity through integrative science and art education programs.
- ④ Raise awareness, connection, and community around the *Western Flyer*.
- ⑤ Strengthen the organization’s financing, governance, and infrastructure.



Mission

To stir curiosity through marine research, education, and a blend of science and art inspired by John Steinbeck, Ed Ricketts, and their journey on the *Western Flyer*.

Vision

We share Steinbeck and Ricketts's vision of an interconnected world, where species are bound together, and curiosity about life is an abiding source of inspiration to understand and protect it.

Who We Serve

Our research and education programs serve scientists, students, and educators, and our outreach activities serve all community members.

Where We Operate

The *Western Flyer* will be based in Monterey Bay, California, nine to ten months per year. During the other months, the vessel will travel to ports along the Pacific coast from Baja California Sur, Mexico, to as far north as Alaska.

Our Values

Curiosity

We aim to spark joy and curiosity in science and the ocean, incorporating art, literature, and other humanities.

Inclusivity

We welcome all people, embrace and respect differences, and make spaces where everyone can be their full and authentic selves.

Collaboration

Building community and collaborating with local partners is a core feature of all our programs.

Adaptability

We are open to exploring new ideas, taking risks, learning, and adapting as needed.

Objectivity

We foster objective, reliable, and innovative research.

Stewardship

We are stewards of the historic *Western Flyer* and work to instill an environmental stewardship ethic in students and researchers by increasing awareness and connection to the ocean.

Goals and Objectives

1 Outfit, Protect, and Maintain the Historic *Western Flyer*

With the restoration and outfitting of the *Western Flyer* nearly complete, we are transitioning to the vessel's ongoing care and maintenance. Future upgrades and changes will match the original restoration goals of preserving the vessel's 1937 appearance, minimizing impacts on marine environments, and incorporating technological updates for research and education.



Objective 1.1 | Complete the final phase of restoring the *Western Flyer* as a functional marine research and teaching vessel.

Actions

- Finalize the interior construction, woodworking, electrical, and plumbing systems.
- Convert the fish hold into a research laboratory.
- Equip the vessel with the tools necessary to deploy oceanographic instrumentation.

Objective 1.2 | Maintain the *Western Flyer* to ensure its safety and operations while preserving its historical integrity.

Actions

- Establish and implement a regular system of maintaining the deck spaces, tools, equipment, and small craft.
- Establish and implement an annual schedule of maintenance and dry dock.
- Recruit and oversee deckhands and volunteers for vessel maintenance.

Objective 1.3 | Implement robust maritime safety and operating protocols.

Actions

- Finalize and regularly update a comprehensive Vessel Operating Manual, documenting all systems on the vessel.
- Finalize a comprehensive Safety Manual informed by UNOLS Research Vessel Safety Standards and following all applicable laws and regulations.
- Establish and implement regular safety training for staff and crew.
- Conduct and log monthly inspections of safety equipment.

Measuring Success

Successful implementation of Objectives 1.1-3 will include:

- Complete restoration of the *Western Flyer*, with a regular and comprehensive maintenance schedule implemented and underway.
- Completion and regular updating of manuals and protocols to protect people and the environment.
- Compliance with all relevant regulations.

2 Deepen our Scientific Understanding of the Ocean

Our research program extends Steinbeck and Ricketts's work of carefully observing and documenting patterns in marine environments to improve our understanding of how marine ecosystems function and impact human communities—and how coastal systems change over time. Through strategic partnerships and collaboration, our research will fill important gaps in data in Monterey Bay and our other areas of operation, taking advantage of the unique nearshore research capabilities offered by the *Western Flyer's* quiet, diesel-electric hybrid engine. Our research program will be deeply integrated with our education program, with students collecting high-quality data and scientists mentoring and learning from students.



Objective 2.1 | Equip the *Western Flyer* with cutting-edge marine science instrumentation.

Actions

- Acquire and install onboard science instrumentation and establish and implement schedules for maintenance and calibration.
- Design and implement an onboard data architecture that links different data streams for viewing, exporting, and archiving based on a time stamp and GPS location.
- Install infrastructure to facilitate real-time data viewing and instrument interfacing from the fish hold laboratory and elsewhere on the vessel.

Objective 2.2 | Develop and implement an innovative and rigorous marine research program in Monterey Bay

Actions

- Build relationships and identify opportunities to collaborate with researchers from leading marine science institutions studying and working in Monterey Bay.
- Establish and implement regular data collection at a series of long-term monitoring sites.
- Establish data processing and quality control procedures that meet national and international standards.
- Deposit all data in appropriate, publicly accessible databases.
- Identify other research areas where we can fill important knowledge gaps.
- Share *Western Flyer* research at relevant regional and national/international scientific conferences and in peer-reviewed journals.

Objective 2.3 | Develop and implement marine research programs beyond Monterey Bay

Actions

- Build collaborations with researchers and institutions in the Gulf of California and along the Pacific Coast of the United States.
- Implement a Spring 2025 pilot research trip in the Gulf of California, revisiting selected 1940 sites to assess future research possibilities, securing necessary permits, collecting data, and sharing results.
- Implement a Spring 2026 pilot research trip in the Pacific Northwest, including securing necessary permits, collecting data, and sharing results.

Objective 2.4 | Establish partnerships and a charter program for the *Western Flyer* that support important research while generating revenue for the organization.

Actions

- Share and promote the scientific capabilities of the *Western Flyer* with prospective researchers via our website, social media, local talks, seminars, and conference presentations.
- Engage in trial research charters with partners (e.g., Stanford University's Hopkins Marine Station, Naval Postgraduate School) in Monterey Bay.
- Implement an organizational system for charter boat operations, including a boat calendar and booking system.
- Develop partnerships and apply for grants with researchers interested in the unique ability of the WFF to offer both ship time on the *Western Flyer* for data collection and established WFF education programs for broader impacts and outreach.
- Develop partnerships with research institutions to use the *Western Flyer* for contracted data collection.

Measuring Success

The success of Objectives 2.1-4 will be measured by:

- The number of days the *Western Flyer* collects data with partners and students at sea, with data deposited publicly.
- The number of days the *Western Flyer* serves research charters at sea and the revenue generated.
- The number of partner research institutions we support and collaborate with.
- Total student scientists participating in research cruises.
- Frequency of sampling for long-term monitoring transects.

3 Stir Curiosity Through Integrative Science and Art Education Programs

Our education program stirs curiosity among students through a blend of science and humanities inspired by the friendship of Steinbeck and Ricketts. In doing so, we motivate and prepare students to identify and follow their curiosities, explore their connections to nature, and integrate the arts and sciences into their lives. Teachers and students observe and experience marine and coastal ecosystems, gain insights into ocean-centered careers, and immerse themselves in the vessel's rich literary and historical traditions.



Objective 3.1 | Develop and pilot onboard marine science programs for post-secondary students.

Actions

- Build upon the partnership with Stanford and the Naval Postgraduate School to pilot the SEACOAST Ocean and Atmosphere Science Program, serving an estimated 150 students annually.
- Explore new collaborations with community colleges and universities to develop custom education programs.
- Pilot a cross-disciplinary mentoring program that engages post-secondary students in teaching and mentoring high school students.

Objective 3.2 | Expand, develop, and pilot land-based educational activities integrating science and art, serving K-12 students in the Monterey Bay region.

Actions

- Continue implementing and refining the Community Journal Project (nature journaling and marine ecology), which serves an estimated 500 students annually from at least ten different classes and nonprofits.
- Develop and pilot an experiential coastal field trip program that integrates coastal ecology, creative writing, and art to serve an estimated 100 students annually.
- Establish an Education Advisory Committee with expertise in humanities and science, equitable teaching practices, and education research to explore new ideas integrating marine science with arts, creative writing, history, and literature.

- Engage at least ten post-secondary mentors per year in classroom instruction and small group career mentoring of K-12 participants.

Objective 3.3 | Research and pilot education programs in other parts on the West Coast, including the Pacific Northwest and the Gulf of California, Mexico

Actions

- Develop an advisory group for each region to help assess local needs and to serve as program ambassadors.
- Pilot traveling education programs during the *Western Flyer's* trips along the Pacific Coast.
- Work with strategic partners to implement education programs in the Gulf of California in Spring 2025 and the Pacific Northwest in Spring 2026.

Objective 3.4 | Prioritize working with students with known barriers to educational opportunities due to race, geography, gender, and socioeconomic status.

Actions

- Partner with instructors, school districts, informal educators, and organizations serving historically marginalized student bodies to collaboratively develop programs that best serve their students.
- Translate curriculum into Spanish and offer bilingual programs.

Measuring Success

The success of Objectives 3.1-4 will be measured by:

- The number of schools, students, mentors, and educators engaged.
- The percentage of participating students with identities marginalized and underrepresented in the sciences, including students of color, low-income students, and English language learners.
- The number of students receiving “high touch” experiences that include multiple contacts with Western Flyer Foundation (vs. “single touch,” lower-impact experiences with single or otherwise limited contacts.)
- Percentage of educators we engage multiple years in a row or in more than one program in a single year.

4 Raise Awareness, Connection, and Community around the *Western Flyer*.

While marine science research and education are the primary focus of our work, the story of the *Western Flyer* attracts people of all ages and diverse interests. Marine scientists are inspired by the landmark voyage and by Ed Ricketts's intertidal work; history buffs are fascinated by the vessel's storied past; literature fans are drawn to the connection with John Steinbeck and *The Log from the Sea of Cortez*; woodworkers and boatbuilders are interested in the award-winning restoration; and boaters and travelers of all sorts relate to the vessel's nautical adventures. Communities in Monterey, Port Townsend, Sitka, and throughout the Gulf of California feel a special kinship and connection to Ed Ricketts, John Steinbeck, and the storied *Western Flyer*. We aim to honor and grow these connections through outreach activities that raise awareness about the story and build community.



Boat tours during the Western Flyer Homecoming celebrations in Monterey, November 4, 2023.

Objective 4.1 | Hold outreach events that engage the public, raise awareness, and build community.

Actions

- Organize regular tours of the docked *Western Flyer* for the public and custom tours for special groups, including teachers, members of the commercial fishing community, and partner nonprofits.

- Deliver regular presentations to community groups and participate in local festivals.
- Organize *Western Flyer* events, such as mini-festivals around the docked vessel, that bring together scientists, artists, and writers.

Objective 4.2 | Hold a successful return trip to the Gulf of California in 2025.

Actions

- Partner with local organizations, businesses, and community leaders to plan and coordinate on-the-ground logistics.
- Partner with a commercial ecotourism vessel to take donors and supporters on the trip, shadowing the *Western Flyer*.
- Organize fiestas and educational outreach programs in ports to celebrate with local communities.
- Coordinate the schedule, tours, and celebrations in a way that complements research and education programs in the Gulf of California.

Objective 4.3 | Enhance our marketing & communications strategy through media communications, storytelling, and the arts.

Actions

- Produce a short film about the Western Flyer Foundation to generate support and raise awareness.
- Continue weekly social media posts and monthly newsletters.
- Work with a consultant to refresh our marketing and communications plan, which may include a mix of podcasts, films, newsletters, social media, presentations, and more.

Measuring Success

The success of objectives 4.1-4.3 will be measured by:

- Number of community events held and attendance.
- Number of stories in the press.
- Numbers of subscribers to our email list, followers on social media, and viewers of our film and website.

5 Strengthen the Organization's Infrastructure, Financing, and Governance



Objective 5.1 | Secure long-term berthing, office space, and educational facilities in Monterey.

Actions

- Work with the City of Monterey to secure berthing for the *Western Flyer* on Old Fisherman's Wharf, including adequate security, electricity, safe vessel access, and a long-term lease arrangement.
- Work with the Monterey Bay Aquarium to secure and retrofit spaces at Heritage Harbor for a classroom-laboratory, office space, and restroom with a long-term lease arrangement.
- Work with the City of Monterey to develop and implement a restoration plan for Pacific Biological Laboratories that will allow long-term access to the lab for education and outreach programs.

Objective 5.2 | Secure reliable revenue that exceeds operating expenses.

Actions

- Create a three-year, annually updated strategic fundraising plan with a sustainable mix of donations, fundraising events, grants, corporate sponsorship, and earned income.
- Develop and maintain a detailed, annually updated three-year financial model.
- Set aside a minimum three-month operating reserve plus an annual reserve for vessel maintenance.

Objective 5.3 | Retain and recruit expert board members, staff, contractors, and volunteers.

Actions

- Enhance the Board through an internal assessment and ongoing Board training.
- Enhance staff proficiency and growth through ongoing professional development.
- Develop a volunteer program that advances our mission and enriches staff and volunteers.

Objective 5.4 | Implement a regular system of evaluating our organization and programs.

Actions

- Conduct an annual assessment to evaluate practices regarding diversity, equity, inclusion, and accessibility.
- Develop evaluation tools for our education programs that assess learning outcomes in diverse communities and success in integrating humanities and science.
- Develop evaluation tools for our research program to assess the impact, novelty, and contribution of the data we collect.
- Evaluate the strategic plan annually to examine progress and make necessary adjustments.

Measuring Success

The success of objectives 5.1-5.4 will be defined and measured by:

- Total revenue earned, liquidity, and months operating reserve.
- Staff and volunteer retention.
- Total number of volunteers.
- Implementation of an ongoing annual evaluation process.
- The *Western Flyer* has secured a permanent home in Monterey with berthing, offices, and a classroom/laboratory.

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