

## Ocean Institute President & Chief Executive Officer

***The Board seeks an entrepreneurial, inspiring, charismatic executive to: increase attendance across all age groups; diversify and increase earned and contributed revenue; strengthen the operating infrastructure; and continually upgrade and refresh the Institute's diverse programs.***

The Ocean Institute's mission is: ***Using the ocean as our classroom, we inspire children to learn.*** Located on the ocean front at Dana Point Harbor in southern California, the Ocean Institute is one of the most renowned hands-on coastal marine science and maritime history education institutes in the US. Founded in 1977 to provide experiential education to K-12 students and their teachers, over the last 38 years the Institute has continually evolved to expand its programs, facilities and constituents, and has acquired (and owns debt-free) a range of facilities to house a strong suite of innovative marine and social science programs, including:

### **Indoor Learning Facilities**

- *Ecology Learning Center* - Includes touch tanks with marine life, wet-tables with video-microscopes, and an interactive children's theater.
- *Maritime Center* – Classrooms and hands-on tools for teaching maritime history.
- *Packard At-Sea Learning Center* – A teaching lab and tank farm that houses marine life including jellyfish at various stages of development.
- *Surfscience Learning Center & Sleeping Deck* - Houses teaching exhibits that include an ROV and oceanography test tank, wave tank, shark & ray pool, a shipboard research station and a one-of-a-kind venue for overnight field trips.

### **Outdoor Learning**

- *Maddie James Seaside Learning Center* – Our new, spectacular educational platform that floats over the harbor and engages students and public participants with in-depth explorations of local ecosystems. Historic maritime technology is showcased on its wharf.
- *Marine Conservation Area* - Eight acres of beach and tidepools adjacent to our facility; used to explore the surf and intertidal zones.
- *Outdoor Education Camps* – These experiential education camps provide a range of day, overnight, and multiple day programs organized by the Ocean Institute and its partner the Lazy-W Ranch in the Cleveland National Forest. Here students embrace the natural world, study ecosystems and experience California history first-hand.
- *Ocean in Motion Van* - A mobile laboratory for outreach to special needs and underserved students.

### **Shipboard Learning**

- *Pilgrim* - A 130 foot replica of the tall ship that Richard Henry Dana, Jr. sailed into Dana Point in the 1830s and immortalized in the classic account *Two Years Before the Mast* about the original Pilgrim's 1834 voyage between Boston and California. Used in overnight and dockside programs, the ship was also used in the Steven Spielberg

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directed film *Amistad* about the successful 1839 shipboard revolt of Mende tribesmen against their captors and the subsequent international trial.

- *Spirit of Dana Point* - An accurate replica of a 1770's privateer used during the American Revolution. Known for their speed and use in smuggling and the slave trade, this 118-foot topsail schooner provides a sailing platform for marine science and maritime history education and other experiences for children, youth and adults.
- *R/V Sea Explorer* - A 65-foot marine science research vessel used for student programs, as a platform for scientific research collaborations, and to take visitors out to sea to see marine wildlife, including whale watching.

### **Other Facilities**

- *Samueli Lecture Hall and Conference Center* - The central meeting space of the Institute, used for educational presentations as well as community and special events.
- *Swenson Student and Teacher Services Building* - The main administration building with a two-story open lobby that serves as an ocean-themed exhibition platform and hands-on interpretive center.
- *Laurena G. Chambers Gallery and Gift Store* - Staffed by volunteers, this boutique-like store offers unique educational materials and ocean and maritime-themed items.

Annually, 100,000 students and 6,000 teachers participate in immersion programs in and beyond the Institute's various facilities. The Ocean Institute has an annual operating budget of \$7 million and a contributed fundraising budget of \$2 million (2/3 of the operating budget is funded through earned income, and 1/3 through contributed income). The organization employs 100 full and part-time staff members, engages hundreds of volunteers, and its current and past professional partners include JPL, the National Science Foundation and Scripps Institution of Oceanography. The Institute is guided by a Board of 22 including seven Executive Committee members.

The Ocean Institute is a member of the American Camp Association.

### **BASIC FUNCTION**

The President will lead and financially strengthen the Ocean Institute as it continues its evolution as a unique institution that engages children, families, teachers, and the general public in hands-on marine science, environmental education and maritime history programs.

Reporting to the Board, the President is accountable for managing all aspects of the Institute's exhibitions, education and public programming and operations, and for developing, continually updating and implementing a Strategic Plan that sets objectives through 2022. The President is expected to work closely with the staff to ensure that the Institute:

- continues to build its reputation as a distinctive, exciting, thought-provoking place for children, teachers, families and the public to learn about coastal marine life, California's ecosystems, and maritime traditions and history;
- meets area teachers' needs with Standards-based K-12 educational programs;
- retains current members and constituencies, and builds memberships and constituents among a new generation of children, students, teachers, parents, adults, partners and

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supporters, including diverse audiences of different ethnicities and backgrounds, and both residents and seasonal visitors to southern California and Dana Point;

- is effectively managed by building and evolving its exhibitions and educational and public programming, encouraging innovative exploration of the marine world;
- is financially and operationally strengthened by a mix of aggressive and more diversified fundraising, development of earned income opportunities, and through efficient use of Institute resources; and continues to build out and enhance its facilities;
- strengthens its Board by recruiting new Board members and enhancing the Board's By-Laws to improve Board Committee structure, terms of service, and definition of fundraising and governance roles.

### **IMMEDIATE PRIORITIES**

The President's immediate priorities will be to:

- Understand all facets of the Ocean Institute, including the Institute's history, culture, staff, exhibits, finances, planned exhibitions, education and public programs, facilities, assets and infrastructure, operations and the Institute's potential; understand the diverse local, and regional constituencies in southern California, and tourists who visit the region to encourage their interest and engagement in the Ocean Institute;
- Understand the needs of the Ocean Institute, incorporating these needs and appropriate responses into a coherent strategic plan; engage the Board, staff, volunteers, funders and constituents in the implementation of the plan, adjusting the organization's annual operating parameters to include new priorities that advance the mission and strengthen the Institute;
- Build and (most importantly) diversify earned and contributed income; ensure that expenses are properly managed and that capital is effectively invested in improved programs and facilities that benefit Ocean Institute audiences;
- Cultivate relationships with existing and new key stakeholders in the community in order to enhance and develop support for programs, including partnership opportunities with schools and other educational organizations, museums and institutes locally and nationally; and with local educators, community and business leaders;
- Review the current status of the Institute's exhibitions and education programming, and take charge of in-process work related to the permanent installations and living exhibits, current and planned special exhibitions and educational programming, events, school and community partnerships, and such;
- Work with the staff and volunteers to understand their contributions, strengths and concerns; instill a strong sense of partnership and cohesion across the organization; use open channels of communication to reinforce a culture of excellence toward achieving the highest standards of practice in informal educational institutions;
- In conjunction with the staff team, develop exhibits and programs that can be administered within appropriate budgetary constraints that will inform, attract and

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engage the diverse interests of teachers, students and families residing in and visiting Southern California and the Dana Point area.

### **ONGOING RESPONSIBILITIES**

#### **LEADERSHIP & GENERAL MANAGEMENT**

- Manage the business affairs of the Ocean Institute with the intent of achieving greater financial independence and sustainability;
- With the Board, refine and interpret the mission of the Institute and further articulate its place among like organizations in the region, Southern California and nationally; refine, in conjunction with the Board, the Institute's Strategic Plan as needed;
- Work to develop the Board with the intent of deepening the Institute's connection with the community and building a stronger and broader foundation for future support;
- Hire, supervise, motivate, develop and evaluate staff, ensuring that staffing is appropriate and fairly compensated to meet the organization's goals; ensure that approved policies are consistently implemented;
- Oversee the preservation and maintenance of the Institute's physical assets (the exhibits, buildings, ships, and the infrastructure of the campus); continue to build out the Institute campus as needed.

#### **REVENUE DEVELOPMENT, MARKETING AND COMMUNICATIONS**

- Serve as the chief fundraiser for the Institute; work closely with the staff, the Board, and advisors to expand and diversify revenue streams from program fees, admissions, licensing, facility rentals, concessions, rentals, events and other sources; set high expectations for increased financial support from foundations, corporations, individuals, government and other philanthropic sources for the Institute's programs, exhibitions and capital projects;
- Solidify the Ocean Institute's reputation as an exceptional educational organization, and continue to raise awareness among regional, national and international audiences; advance our reputation by successfully pursuing high-level partnerships such as with NSF, and addressing teachers' needs for quality programs in important emerging areas such as STEM, Common Core and Next Generation Science Standards.
- Serve as an articulate and persuasive spokesperson for the Institute; represent the Ocean Institute to all of its constituencies, including funders and prospects, current and prospective visitors; cultivate strong and supportive relationships with other institutions in the region and in the community;
- Work with the Board to establish and grow the endowment to continually upgrade exhibitions, enhance the facility, and provide financial stability as the institution matures;
- Identify and help recruit new supporters whose talents, interests and commitment will help to further the Ocean Institute's mission and programs and expand funding opportunities; nurture strong community partnerships; work to ensure active engagement of Board talent and resources in support of the institution.

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### EXHIBITS, EDUCATIONAL AND PUBLIC PROGRAMMING

- Take a leadership role in guiding the development of new, fun, inspiring exhibitions, outreach and education programs that meet teachers' needs; ensure that best practices are employed; leverage the facilities, ships and our direct ocean access in ways that deepen visitors' ability to have fun exploring and learning new things about the ocean, marine life and maritime traditions and history;
- Work collaboratively and appropriately manage various relationships with other like organizations, thought-leaders in the field, schools, universities, patrons, volunteers and other community members; serve as an advocate for the organization, assuring that the interests of the Institute are advanced and fully understood;
- Work with staff to develop a comprehensive plan to strengthen, continually refresh and enrich the Institute's education programming; develop relationships with others who have an interest in similar organizations, and that may lead to appropriate gifts to strengthen programming and continually upgrade the permanent and temporary exhibitions.

### GOVERNANCE

- With the Board and under the direction of the Board's Chair, set the strategic direction for the Ocean Institute; implement Board policies, goals, priorities and objectives; keep the Board informed of all relevant issues; attend all Board meetings and committee meetings as required;
- Identify and help recruit new Board members whose talents, interests and commitment will help to further the Ocean Institute's mission and programs, and will help to expand funding opportunities;
- Work with the Chair to ensure an effective Board committee structure and active engagement of Board talent and resources in support of the institution; cultivate a mutually supportive relationship with stakeholders and other groups that are important to the future of the institution.

### **IDEAL EXPERIENCE AND QUALIFICATIONS**

The ideal candidate has the following experience and qualifications:

- Strong management and leadership responsibility in a museum, educational institute, school or associated institution that attracts a similar audience, and is known for: innovative programming; a deep understanding of how children, their families and adults learn; and cultivating strong ties with the regional community;
- In-depth and current experience in marketing and raising the public profile of educational institutions for students and the public; an extensive background or passion for the education process and the marine environment would be an advantage;
- The ability to work successfully with donors, community leaders, educators, designers, community members and the Institute's Board to strengthen the Institute; measurable and successful results in raising funds and in identifying, cultivating and soliciting donors and other sources of revenue and in managing change;

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- A detailed understanding of operations and financial management, particularly in a similar educational nonprofit environment; an understanding of nonprofit revenue and expense models in USA-based nonprofits would be an advantage;
- Experience working with scholars and educational leaders as active and valued collaborators; demonstrated ability to forge mutually respectful and effective relationships with a diverse group of personalities in a collegial and cooperative manner;
- Outstanding oral and written communication skills, including the means to address issues in non-confrontational and non-polarizing ways, but nevertheless with determination; a track record as an effective, well-respected manager.

**PERSONAL CHARACTERISTICS**

The successful candidate should be:

- An individual with a passion for connecting the public with the Ocean Institute; who will enjoy connecting residents and visitors to Orange County and the Dana Point area, as well as visitors to the region, with the Institute;
- Interested in the ocean, education, and addressing the region's educational needs;
- A leader adept at planning, prioritizing, organizing and following through; a hard worker with a high energy level who welcomes accountability;
- A team player and team builder who is a good listener and strategist comfortable receiving input from many sources; a graceful communicator able to connect with a broad spectrum of people;
- A person who cultivates trust and engages the interest of constituents; an individual who is straight-forward, shares information easily, receives as well as gives advice, and respects the abilities of others; someone who imparts trust, integrity and solidity and guides others in a similar vein; an ability to disagree without being disagreeable;
- Someone who enjoys close collaboration particularly with the Board's Chair, other Board members and senior staff; comfortable engaging in an open and forthright manner;
- A collaborator who thrives on entrepreneurial partnerships of community significance;
- A person who is easy to respect with a sense of humor and perspective.

For more information please contact:

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