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EcoAtlas Business Plan:
Steps toward implementation

Nov 6, 2018



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on behalf of the California Wetland
Monitoring Workgroup (CWMW)

San Francisco Estuary Institute

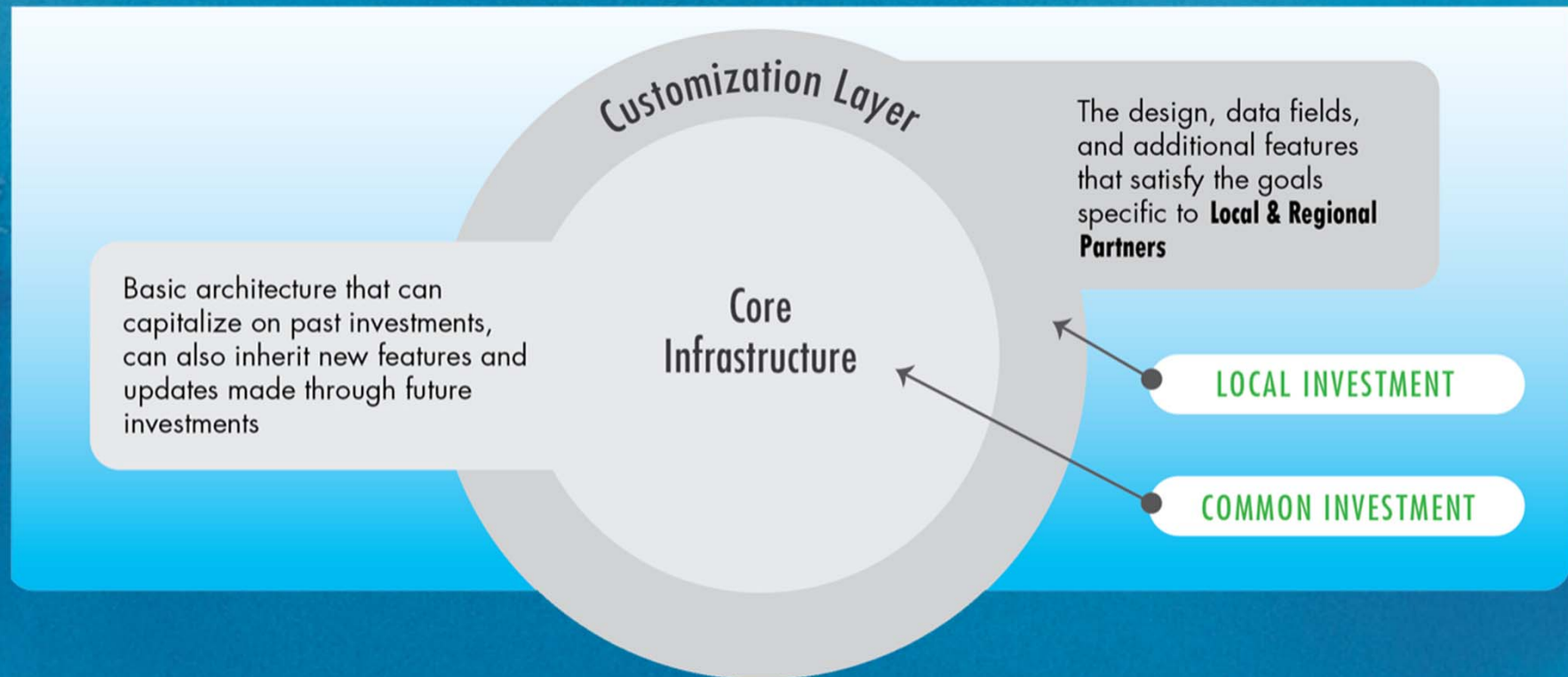


Funding Vehicles

- Primary proposed funding vehicles
 - In-lieu-fee agreements
 - Participant fees
 - Grant-based projects
 - Licensing fees
- Funding vehicles considered and relegated to a lower priority
 - Data-sharing agreements
 - General service agreements

Sustainable Directions

Pursue regionalization and customization of the Toolset via contracts and grants



Sustainable Directions

- Leverage enhancements and customizations as incentives
- Recurring funding
 - Participant fees, license fees, and in-lieu-fee agreements will pay for continued support of customizations
 - will also pay for general operations & maintenance and user support

Notable Quarterly Updates

Key Presentations

- SWRCB
 - 9/6, we convened a meeting with high-level representatives, including
 - Eileen Sobeck, Executive Director, SWRCB
 - Joaquin Escovel, Board member
 - James Nachbaur, ORPP, Director of the Office of Research, Planning and Performance
 - Eric Oppenheimer, Chief Deputy Director
 - Paul Hann, Division Chief, Surface Water
 - Karen Mogus, Chief, Division of Water Quality
 - Greg Gearheart, Deputy Director, Office of Information Management and Analysis
 - Warner Chabot, Executive Director of SFEI
 - Tony Hale, Program Director for Environmental Informatics
 - Following up on a number of action items

Notable Quarterly Updates

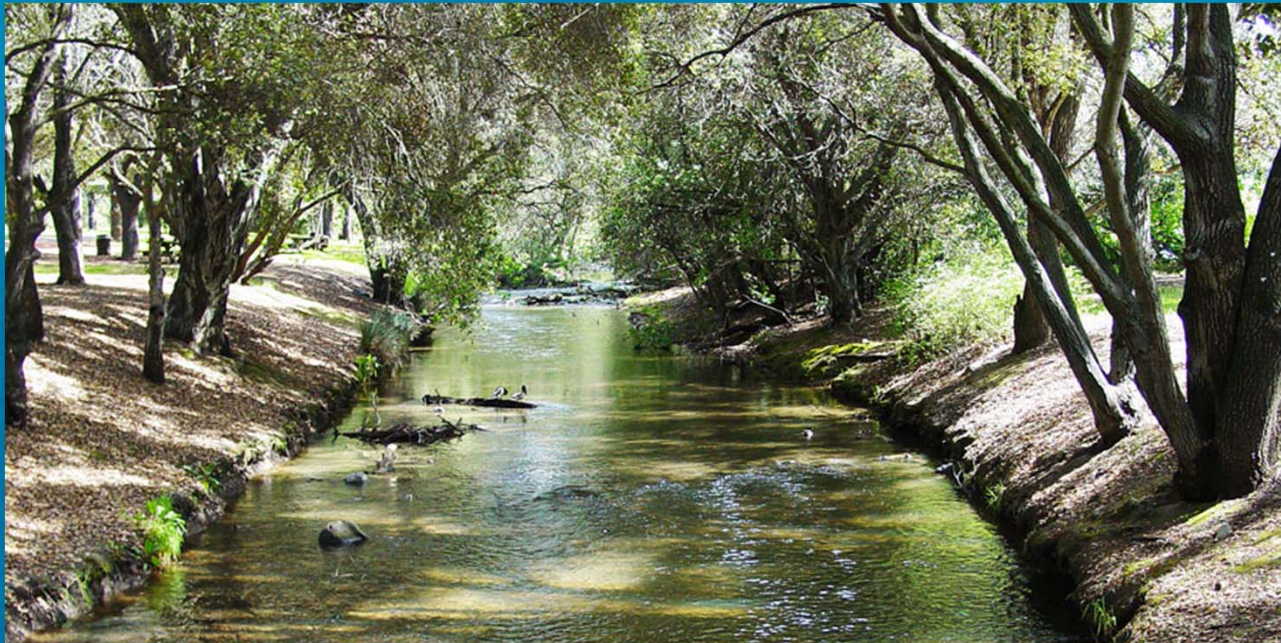
Key Presentations

- Department of Technology
 - We were referred to the California Dept of Tech (Scott Gregory) to discuss the exceptionality of the toolset -- ie, created by the CWMW, multi-agency by design
 - Currently still trying to arrange a meeting

Notable Quarterly Updates

Customizations and Regionalization

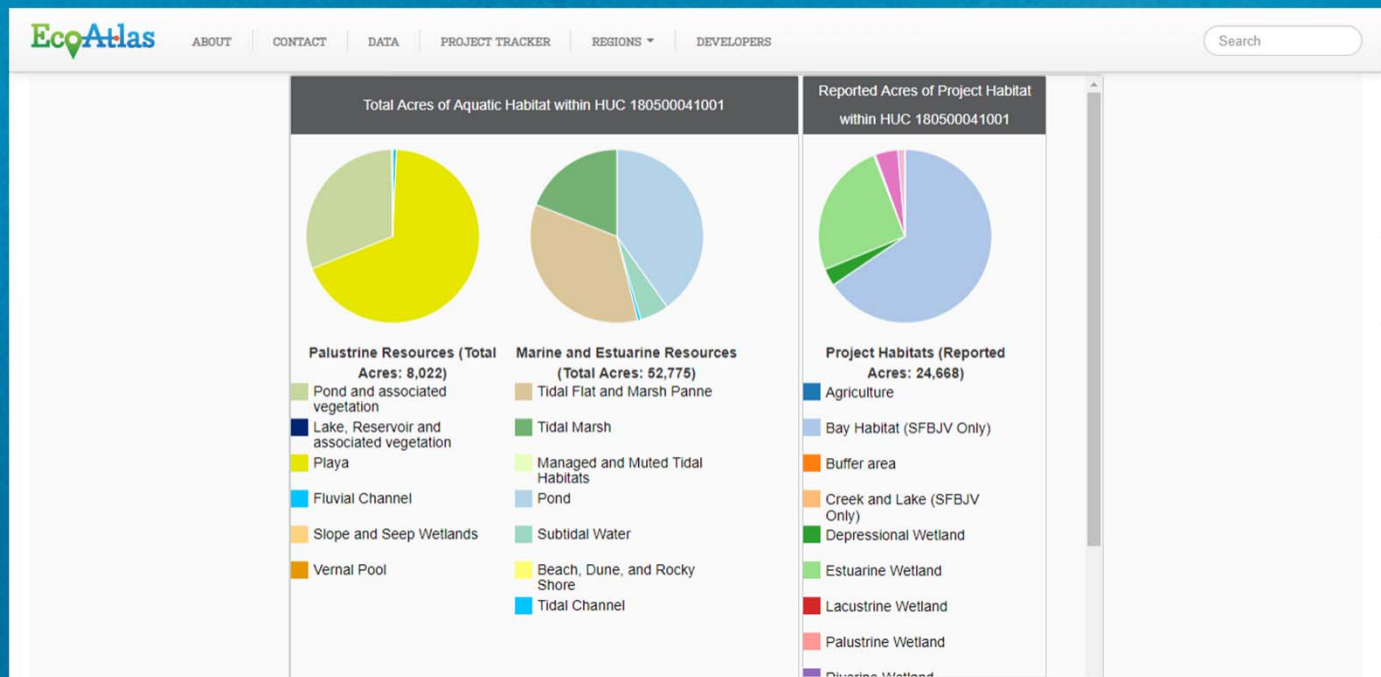
- Coyote Creek Restoration Tool, Santa Clara Valley Water District
 - Develop specialized metrics to identify and justify where habitat restoration might be performed in Coyote Creek: a form of scenario planning



Notable Quarterly Updates

Customizations and Regionalization

- Joint Ventures Dashboard
 - Custom dashboard to display JV-specific measures



Notable Quarterly Updates

Customizations and Regionalization

- Advancing Performance Measures Reporting
 - Distributed (entered by proponents) and centralized (reporting) management of target and actual measures of restoration performance
 - Poised for use by key State agencies interested in tracking restoration performance over time

Steps for implementation



- ~~1. Form implementation committee within the CWMW~~
 - ~~a. Those interested in the viability of the funding model~~
 - ~~b. Those who are interested in expanding the user base~~
 - ~~c. Those with a vested interest in EcoAtlas's success~~
- ~~2. Further develop the outreach plan to communicate with currently involved agencies, organizations, and future partners~~
 - ~~a. Meet with current and potential partners~~
 - ~~b. Leverage communication materials~~
3. Recursively communicate with CWMW to make adjustments along the way

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Questions?

Thank you!

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Frequently Asked Questions

- Who governs the development of the Toolset?
- How much will we charge?
- How do we propose to handle organizations unable to afford recurring fees?
- How do we ensure broad access to information by the general public?

Who governs the development of the Toolset?



- Subcommittees of the CWMW have influenced the development of the tools, in alignment with the WRAMP framework
 - Level 1 -- Remotely sensed data: eg, CARI
 - Level 2 -- Rapid assessment tools: eg, CRAM
 - Level 3 -- Intensive landscape assessments: eg, Integrating datasets such as the California Stream Condition Index
- The subcommittees will continue to oversee their respective core competencies
- Customizations and enhancements not pertinent to the core of the products will not be reviewed by the governance committees
- The governance committees will steward changes to QA/QC measures

How much will we charge?

- Because the project is managed as a non-profit enterprise, the cost basis will remain the same, no matter the number of contributors.
- The more contributions, **the less each will pay.**

Recurring Costs...

- ...For CRAM, EcoAtlas Map Viewer, CARI, Project Tracker, and Landscape Profiles are \$360k
- ...For governance and coordination are \$40k

Eg, If ten organizations contribute evenly, then the cost for each is \$40k

- Fees will be re-assessed annually.
- New contributors will lower the fees for other members.

How will we handle non-paying clients?

- Continued access to data via the tools

However,

- No helpdesk support
- No special trainings
- No form or reporting customizations

How do we ensure broad access to information by the general public?

- In alignment with workgroup principles, public data will remain public
- Considered a breakdown of basic and premium features
 - However, the exclusivity of data access is not consistent with the CWMW.



Primary Challenges

- The EcoAtlas Toolset has no formal agency home
- The Toolset has limited recurring funding
 - has been developed largely via grants
 - EPA-funded projects were designed to build California's wetland program capacity
- Users of the Toolset have grown accustomed to receiving services for free

Business Plan Structure

- Definitions
- Goals & Core Principles
- Background
- Detailed Descriptions
- Audience and Site Analytics (visits to the site)
- Funding Model
- Roadmap
- Outreach

What is a business plan?

- A **business plan** is a printed document that helps to promote alignment in articulating and achieving common goals
- **Our Goal:** To achieve sustainable service through sustainable funding
- **Current status:** implementation

