



# Blue Whale Study

## Strategic Plan 2016 - 2020

*“A charitable organisation conducting ecological research and education to promote understanding and conservation of endangered blue whales and their feeding habitat in southern Australia”*

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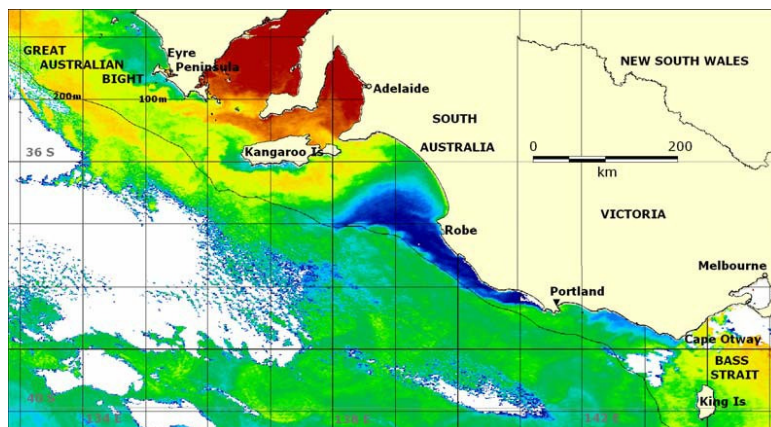
## 1. Introduction

Blue Whale Study developed this strategic plan to provide guidance and direction for the organisation until 2021. It replaces the Business Plan which was developed in 2009. Blue Whale Study is dedicated to the scientific study of Endangered blue whales (*Balaenoptera musculus*) and the conservation of this species and its habitat. The organisation disseminates knowledge about blue whales through lectures, public speaking, consultancies, education programs, ecological research and conservation projects.

The organisation is based at Tyrendarra, south west Victoria, and is led by Dr. Peter Gill who is recognised as a leading expert in blue whale ecology both in Australia and internationally. Dr. Gill and his team of scientists work in southern Australian waters between Bass Strait and the Great Australian Bight, during summer and autumn, when the whales migrate to the Bonney Upwelling region to feed on krill.

The Bonney Upwelling is one of Australia's most remarkable marine phenomena. The upwelling displaces warm surface waters with cold water from deep in the ocean. This 'upwelling' of cold water brings nutrients to the surface which tiny plants, called phytoplankton, thrive on. The phytoplankton then provides food for krill and it is the abundance of krill which attracts blue whales. Therefore the Bonney Upwelling region is important feeding habitat for this remarkable species.

Figure 1 is a colour-coded satellite sea surface temperature image provided by CSIRO. Red represents the warmest temperature and blue the coolest. Cold water upwelling extends during summer-autumn along the continental shelf (seen as a thin black line) from north-west Tasmania to the eastern Great Australian Bight. In certain areas within this extensive upwelling region, upwelled water reaches the surface. The most prominent example is the dark blue plume of the Bonney Upwelling, surfacing west of Portland and flowing north-west along the narrow continental shelf off south-eastern South Australia. Other areas of cooler surface water indicating upwelling are apparent west of Cape Otway, south of Kangaroo Island and west coast of Eyre Peninsula.



**Figure 1 Sea Surface Temperature image showing upwelling event (image courtesy CSIRO)**

Blue whales are the largest living creatures on earth and are at risk of extinction. The protection of blue whales is documented in international conventions and agreements, Australian Commonwealth and State Legislation and in particular the Australian Government's Conservation Management Plan for the Blue Whale (2015).

**Table 1: Conservation Status of Blue Whales**

Status	Government / Organisation	Governing Document
Endangered	International Union for Conservation of Nature (IUCN)	World Conservation Union Red List of Threatened Species
Protected Stock	International Convention for the Regulation of Whaling (ICRW)	ICRW Schedule - Paragraph 10(c)
Listed	Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)	Appendix 1
Endangered	Convention on the conservation of Migratory Species of Wild Animals (CMS Bonn Convention)	Appendix 1 – Endangered Migratory Species
Endangered	Australian Government	Environment Protection Biodiversity Conservation Act (EPBC) 1999
Endangered	State Government of New South Wales	Threatened Species conservation Act 1995
Endangered	State Government of South Australia	National Parks and wildlife Act 1972
Endangered	State Government of Tasmania	Threatened Species Protection Act 1995
Endangered	State Government of Western Australia	Wildlife Conservation Act 1950
Threatened	State Government of Victoria	Flora and Fauna Guarantee Act 1988

## 2. Background History

Dr. Peter Gill initiated the first Australian research program on blue whales in the Bonney Upwelling in early 1998. The Australian Government's Natural Heritage Trust program funded this research for the first critical years. In 2005 Dr. Gill was awarded his PhD '*Ecological linkages in the Bonney Upwelling blue whale feeding area*' at Deakin University, Warrnambool, and in 2006 he accepted the position of Honorary Research Fellow in the School of Environmental & Life Sciences, Deakin University, Warrnambool.

In 2007 Blue Whale Study was registered as an Incorporated Association (under Victorian Law) through Consumer Affairs Victoria. The organisation operates according to its Rules of Incorporation which are registered with Consumer Affairs Victoria.

In August 2008 the Commonwealth Scientific Industrial Research Organisation (CSIRO) gave approval for the Blue Whale Study to be recognised as an Approved Research Institute. As part of this endorsement Blue Whale Study is required to establish a Research Committee with members of the Committee being approved by CSIRO.

The Australian Taxation Office (ATO) recognises Blue Whale Study as a Charitable Institution with endorsed charity tax concessions and exemption from income tax. The ATO also endorses Blue Whale Study as a Deductible Gift Recipient (DGR), which means donations made to Blue Whale Study are tax deductible. Table 2 outlines the administrative activities which laid the foundations for the organisation.

**Table 2. Blue Whale Study – Key Formation Activities**

<b>Year</b>	<b>Activity</b>
1998 - 2007	Formative years of Blue Whale Study as Dr. Peter Gill completed research and a PhD into blue whale ecology with assistance of the Natural Heritage Trust, other funding agencies and Deakin University.
2007	<ul style="list-style-type: none"> <li>- Blue Whale Study registered as an Incorporated Association with Consumer Affairs Victoria (CAV).</li> <li>- Rules of Incorporation established and registered with CAV.</li> <li>- Charity Tax Concession status granted by the Australian Taxation Office (ATO).</li> </ul>
2008	<ul style="list-style-type: none"> <li>- CSIRO approves the organisation to be recognised as a 'Research Institute'.</li> <li>- Australian Taxation Office (ATO) organisation granted Deductible Gift Recipient (DGR) status with the ATO.</li> </ul>
2009	ATO registers Blue Whale Study as a Charitable Institution with Income Tax exemption, GST Concessions and FBT rebates.
2012	Australian Charities and Not for Profit Commission registers Blue Whale Study

The finances of the Blue Whale Study are managed by the Administration Manager and overseen by the CEO and Committee. Blue Whale Study uses the services of an independent accountant for quarterly BAS reports and engages an auditor to annually audit the organisation finances.

Blue Whale Study has developed collaborations with research groups from Australia and overseas, including Cascadia Research (USA), the University of Tasmania, the Australian Antarctic Division, the Centre for Whale Research (WA),

Curtin University, Scripps Oceanographic Institute (USA), Western Whale Research (WA), Macquarie University, Flinders University, South Australian Research & Development Institute (SARDI), New Zealand's National Institute of Water & Atmospheric Sciences (NIWA), Oregon State University and the Southern Hemisphere Blue Whale Catalogue project. These collaborations are ongoing and bring a great wealth of experience and knowledge to the research.

Examples of research activities include:

- aerial surveys looking at broad-scale blue whale distribution in relation to environmental factors;
- small vessel surveys looking at fine-scale feeding ecology of blue whales and the ecology of their krill prey;
- tagging studies to investigate large-scale migratory movements, and small-scale foraging movements of blue whales;
- acoustic studies investigating blue whale calling patterns;
- investigation of potential human threats to the recovery of blue whales; and
- studies of upwelling dynamics using oceanographic instruments, archival weather records and satellite remote sensing.

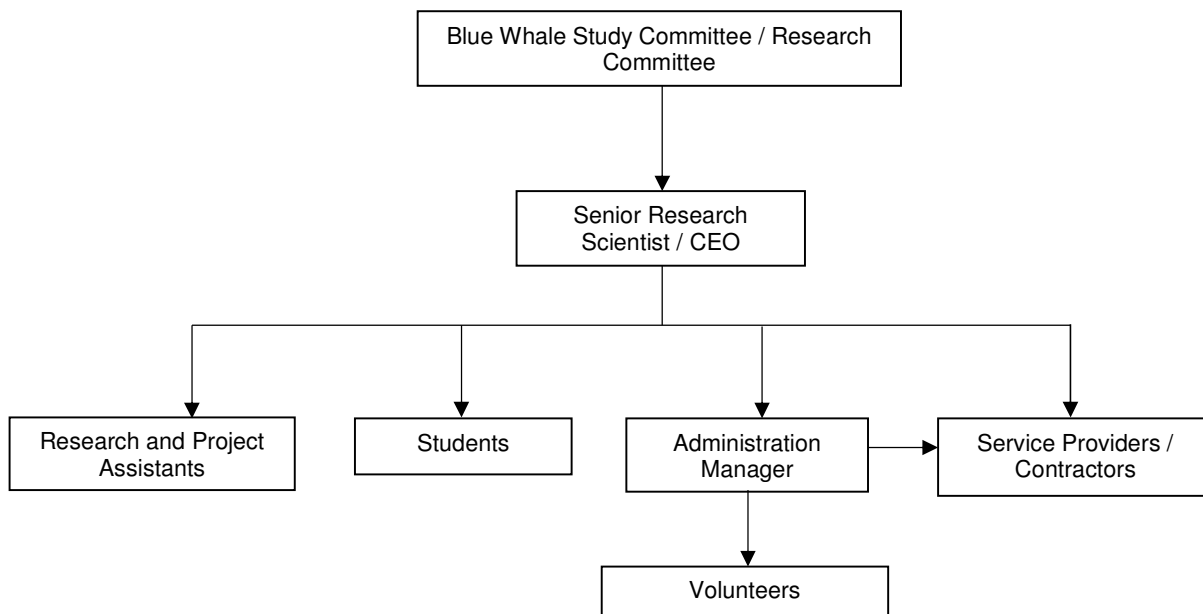
### 3. Management Committee, Staff and Volunteers

The affairs of the Blue Whale Study are managed by a Research Committee which is registered with the CSIRO. Current committee members consist of:

- Ms. Susie Lyons – Chairperson
- Dr. Peter Gill – CEO/Senior Research Scientist
- Dr. Andrew Levings – Marine Scientific Advisor
- Dr. Brad Page – Marine Scientific Advisor
- Ms. Louise Sheba – Administration Manager/Business advisor

The committee meets 4 times each year to oversee the organisation's governance, business management, research project development and progress, budget matters and the review of operational documents such as the Rules of Incorporation.. An AGM is held each year in November.

Blue Whale Study currently employs two part-time staff i.e. Senior Research Scientist/CEO and an administration manager with contractors and volunteers providing other services. Figure 2 outlines the Blue Whale Study organization.

**Figure 2. Blue Whale Study Organisational Chart**

The organisation has 5 Committee members who oversee its operation as a not-for-profit charitable research and education institution. In the event of the business being wound up (voluntarily or by special resolution) surplus assets are to be given to an organisation which has similar purposes to the Blue Whale Study. No member can be in receipt of surplus assets.

It is important to note that Blue Whale Study would not be where it is today without the generous support of donors, volunteers (who are an integral part of the team) and past and present employees. Blue Whale Study relies on funding through project grants, philanthropic donations and consultancies to sustain activities and continue blue whale conservation projects. Volunteer work (provided by Committee, staff and external volunteers) ensures the organisation remains viable. Industry has also provided significant support to Blue Whale Study. For example, support from Santos enabled the purchase of the Blue Whale Study research vessel, the *Bonney Blue*.



**Photo 1. Blue Whale Study research vessel, Bonney Blue**

## 4. Blue Whale Study Vision

The vision of Blue Whale Study is: *A charitable organisation conducting ecological research and education to promote understanding and conservation of endangered blue whales and their feeding habitat in southern Australia.*

## 5. Purposes of Blue Whale Study

The reasons for Blue Whale Study's existence is to:

- Conduct high-standard ecological research on blue whales, other marine species, and their feeding habitat in the Bonney Upwelling and adjacent waters, southern Australia.
- Work towards securing the recovery of blue whales and the maintenance of their feeding habitat as a biologically diverse, productive ecosystem.
- Promote community, national and global awareness of blue whales, other marine species and their feeding habitat in southern Australia through research and education, and to foster community participation in their conservation and management.
- Work with stakeholders, including NGOs, government and industry, to obtain the best possible outcomes for blue whales, other marine species, and their feeding habitat.

## 6. Values

Blue Whale Study prides itself in having a highly regarded reputation amongst peers, industry, government and research organisations. The Committee, staff and volunteers operate at a high level of professionalism, which is guided by following principles:

Blue Whale Study

- observes all laws and regulations governing business activity,
- is a democratic, politically non-partisan and non-sectarian organisation,
- responds to donors in a timely and appropriate manner to acknowledge their assistance,
- works cooperatively with all individuals and groups, with for-profit and not-for-profit corporations and organisations, and with governments and international bodies involved in the conservation and management of blue whales and their habitat,
- provides advice based on sound, objective and professional analyses and research,
- accepts funding from diverse stakeholders so long as the funding source does not compromise our ability to address issues freely, thoroughly and objectively,



- provides timely reports and updates and follows all protocols that are part of funding agreements or arrangements, and
- operates appropriately as a registered charitable institution and Approved Research Institution.

#### Committee, staff and volunteers

- show respect for others whilst working co-operatively
- deliver friendly and professional service
- are courteous and supportive
- act with integrity and be reliable and responsible
- are open, honest and accountable in working relationships

## 7. Strengths, Weaknesses, Opportunities and Threats Analyses

The aim of this Strengths, Weaknesses, Opportunities and Threats Analyses (SWOT) is to appraise the current situation and determine if new goals or development priorities are to be established.

**Table 3: Strengths - Internal and External**

<b>Internal Strengths</b>	<b>External Strengths</b>
Experienced scientists who are known and respected within the marine mammal research community.	Involved in national and international scientific collaborations.
Organisation is part of the local community.	Organisation is based adjacent to the Bonney Upwelling feeding area.
Direct interaction with clients through community education programs.	People have direct involvement with Blue Whale Study scientists.
Members with specific goals – continuing research, community education and sustainable management of blue whales and their habitat, leading to long term conservation.	Received grants and gifts from Government, Corporations and individuals to further its research and development.
Members who balance passion and dedication with scientific rigor and caution.	Good reputation with philanthropists and donors with several providing funds on more than one occasion.

**Table 4: Weaknesses - Internal and External**

<b>Internal Weaknesses</b>	<b>External Weaknesses</b>
Financial constraints due to lack of regular funding.	Global financial crises reduced funds from corporate sectors (2012-15). This impacted the availability of larger grants required for aerial and ocean research survey activities. Scaling down of some projects and seeking funds from a larger number of funders has been necessary.
Limited assets and infrastructure for conducting large scale research projects.	Can be overshadowed by larger research institutions.
Lack of funding for staff and HR.	Changes in government and their scientific research priorities have impacted funding availability.
Lacks a succession plan to replace Dr. Peter Gill. If Peter cannot continue in his current duties, the organisation will be adversely affected.	Availability of qualified marine mammal scientists with experience to be 'on-call' is highly limited in the region.

**Table 5: Opportunities - Internal and External**

<b>Internal Opportunities</b>	<b>External Opportunities</b>
Opportunity to continue and expand scientific research in the Bonney Upwelling area and other areas where blue whales migrate.	Ability to expand collaborations with existing and new research partners, and share resources and innovative technologies.
Opportunity to develop a resource of young marine biologists through mentoring programs.	Interest from schools in science of marine research and education.
Ability to better promote the organisation through website, social media, merchandise and displays.	Opportunity to expand community relations with greater public presence and awareness.
Many knowledge gaps remain and these are critical to secure the recovery of the blue whale population.	Interest from Government organisations and organisations which increases opportunities to secure funding for research.

**Table 6: Threats - Internal and External**

<b>Internal Threats</b>	<b>External Threats</b>
Potential for differing goals and objectives of members.	Potential for existing members to be forced by financial constraints to work elsewhere.
Potential for team members getting bogged down in the detail and not keeping in mind the 'big picture'.	Potential for larger research organisation taking over the same area of study.

Failure to collect baseline research information that supports blue whale conservation.	Potential reduced annual operating budget and funding for blue whale research.
Potential for overload of work for current Blue Whale Study team members.	Lack of availability of suitable new team members such as volunteers and scientists.

## 8. Strategic Goals and Objectives

The Blue Whale Study aims to deliver outcomes that are effective for blue whale conservation, our partners and the broader community. This is achieved through focusing on goals and objectives which are in line with our mission, purpose and values. The strategic goals are:

1. Contribute to blue whale scientific knowledge.
2. Increase awareness of blue whale conservation.
3. Sustain Blue Whale Study operations.
4. Maintain high level professionalism.
5. Promote Blue Whale Study.

**Table 7: Specific Strategic Objectives**

<b>Strategy 1</b>	<b>Actions Needed</b>
Contribute to blue whale scientific knowledge	Continued research projects including oceanographic studies and publishing of work in international journals.
	Maintain collaborations with scientific community.
	Conduct projects and research consistent with the Conservation Management Plan for the Blue Whale 2015 – 2025.
	Impart knowledge to others to increase knowledge about blue whales, the recovery of blue whales from the edge of extinction, and maintenance of their habitat as a healthy functioning ecosystem.
	Attend conferences and present papers.
<b>Strategy 2</b>	<b>Actions Needed</b>
Increase awareness of blue whale conservation	Maintain (through regular updating) the Blue Whale Study website.
	Deliver presentations at public events.
	Provide educational material, where possible, to schools, universities and communities.
	Work with marine based industries and businesses to ensure their activities have minimal impacts on blue whales and their habitat.
	Provide Marine Mammal Observation training to offshore industry.
<b>Strategy 3</b>	<b>Actions Needed</b>
Sustain Blue Whale Study operations	Regularly apply for funding to ensure ongoing project activity.
	Quarterly update and review of annual budget for committee approval.
	Recruit volunteers to assist in projects and administration.

	Develop relationships with philanthropic organisations.
	Maintain the operating instruments of Blue Whale Study e.g. Rules of Incorporation, Strategic Plan and operating policies and procedures by reviewing and updating them.
<b>Strategy 4</b>	<b>Actions Needed</b>
Maintain high level professionalism	Maintain consistent branding of the organisation.
	Operate at as high a level of professionalism as possible.
	Have an annual audit conducted to ensure financial integrity.
	Conduct business in a courteous and polite manner.
	Stay abreast of new developments in blue whale and habitat science
<b>Strategy 5</b>	<b>Actions Needed</b>
Promote Blue Whale Study	Improve the understanding that the knowledge held by Blue Whale Study is highly valuable and unique to the region.
	Maintain a high level profile and reputation to attract grants, philanthropic donations and consultancies.
	Sell the importance of ongoing research.
	Develop a range of merchandise promoting Blue Whale Study.
	Develop a donor/sponsor rewards pack.
	Encourage volunteers to be part of Blue Whale Study.
	Promote the ABC TV Natural History Unit documentary 'The Big Blue' about the blue whales of the Bonney Upwelling.

## 9. Evaluation

It is anticipated that during 2018 a mid-term evaluation report shall be submitted to the Committee regarding the effectiveness of this Strategic Plan. The purpose of an evaluation of the Strategic Plan is to identify which strategic objectives progressed and whether the Blue Whale Study achieved its strategic plan.

The evaluation will be conducted internally and reviewed by the Committee. The committee will provide advice based on the effectiveness of the strategic objectives.

1. To what extent does our progress align with the vision, mission and values in the strategic plan?
2. Should any of our guiding principles be changed as a result of the evaluation?
3. Which strategic objectives are relevant for the activities of Blue Whale Study?