O’Neill Sea Odyssey’s mission is to provide a hands-on educational experience to encourage the protection and preservation of our living sea and communities.
Quick facts:

- O’Neill Sea Odyssey provides a field trip on catamaran and education center.
- The program is free, but a community service project is required for participation.
- Classes and youth groups apply at www.oneillseaodyssey.org. 4th – 6th grade.
- Adam Webster Memorial Fund serves special needs youth.
- Curriculum provided for classrooms, bus transportation for lower income schools.
Accomplishments by the end of 2018

• Founded in 1996, incorporated in 1997. As of the end of 2018, over 100,000 youth in more than 3,600 classes were served.

• O’Neill Sea Odyssey Endowment Fund was at $755,749 and the Jack O’Neill and Harry Hind Endowment Fund was at $1,056,355 on June 30 2018.


• Curriculum has been aligned with Next Generation Science Standards and distributed nationally via the Pepper College Readiness Network.

• 2013 study found 75% of OSO youth retained stewardship values 5-7 years later.

• Certified as a Green Business in 2010.

• Collaborated with other organizations to implement: Ocean Scholars mentor program for Latino youth, Ocean Protectors plastic education program, Project Discovery w/State Parks, and the weeklong San Jose Community Oceanography Program.
Organization

- Board of Directors governs, sets budget and policy, assists with fundraising.
- Programmatic needs are funded as a priority and administrative and fundraising costs are kept to a minimum. Recruit volunteers and interns to strengthen staffing.
- Organization’s assets include upstairs of OSO building at Santa Cruz Harbor, use of Team O’Neill catamaran, curriculum, data, Board of Directors, staff, volunteers, website.
# June 30, 2018 Financial Position

## ASSETS

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$2,806,388</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>$78,091</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>$11,425</td>
</tr>
<tr>
<td><strong>Total current assets</strong></td>
<td><strong>$2,895,904</strong></td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>$715,182</td>
</tr>
</tbody>
</table>

**Total Assets** $3,611,086

## LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$12,818</td>
</tr>
<tr>
<td>Related party payable</td>
<td>$21,828</td>
</tr>
<tr>
<td>Tenant Security Deposits</td>
<td>$8,939</td>
</tr>
<tr>
<td><strong>Total current liabilities</strong></td>
<td><strong>$43,585</strong></td>
</tr>
<tr>
<td>Unrestricted net assets</td>
<td>$1,918,050</td>
</tr>
<tr>
<td>Temporarily restricted net assets</td>
<td>$492,017</td>
</tr>
<tr>
<td>Permanently Restricted Net Assets</td>
<td>$1,157,435</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>$3,567,501</strong></td>
</tr>
</tbody>
</table>

**Total liabilities and net assets** $3,611,086
O’Neill Sea Odyssey’s long-term goals:

1. 125,000 students served by the end of calendar year 2023. Refine and enhance program model.

2. Continue to increase environmental stewardship and advocacy among youth through our hands-on ocean education program combined with our promotion of ocean science curriculum and watershed concepts in classrooms, especially for inland schools.

3. Achieve financial sustainability through endowment & building.

4. Using O’Neill Sea Odyssey’s success as a model, continue to advocate for increased outdoor, hands-on environmental education.

These goals will be met using the following objectives…
Objectives for 2019-2023
Community Outreach & Advocacy

Objective: to educate decision-makers about the value of our work.

- Make presentations to organizations, program supporters, government bodies.
- Promote OSO’s value specifically and outdoor, ocean education generally.
- Invite opinion leaders, media and supporters to observe program.
- Promote milestones and long-term study. Shares testimonials from students, and parents.
Use assets to support our mission

Objective: to use building and endowment for OSO’s future.

- Promote planned giving and legacy gifts for OSO Endowment at CFSCC.
- Grow Jack O’Neill & Harry Hind Endowment Fund at CFMC.
- Sustain building asset.
- Integrate new boat into program, if practical.
- Evaluate more frequent Advisory Board meetings for greater involvement and support.
- Maximize use of these assets to benefit program.

Groundbreaking for O’Neill Building, 1965
Sustain Program

Objective: to diversify, strengthen our fund base and therefore our service delivery.

- Nurture volunteer leadership for events, evaluate alumni association.
- Identify new sources of funding.
- Evaluate increasing service capacity and the funding to sustain it.
- Evaluate increasing service to geographic areas currently under-served.
- Sustain flexible funding for bus transportation.
Promote Program
Objective: to increase our visibility & accessibility.

- Promote the website with curriculum, class database, donors, weather and video.
- Use media coverage and social media to promote our message.
- Build on social media success of 100,000th student campaign.
- Video scroll at area businesses, before and after video for website. Evaluate doing exhibit at Monterey Bay National Marine Sanctuary Exploration Center.
Innovate & Demonstrate Value of Program

Objective: to leverage resources to enhance and to demonstrate program’s impact.

- Promote curriculum & activities on website to students, teachers to promote science and conservation.

- Promote new long-term study by former OSO instructor Marina Maze.

- Review 6th grade participation, to increase participation and quality of 4th and 5th grade.

- Work with Team O’Neill on possible collaborative, pay programs.

- Continue to develop plankton database with Monterey Bay Sanctuary & others.
Continue partnerships and special programs

Objective: Add value to other programs and support youth with special needs

- Collaborate for special efforts such as Ocean Scholars mentorship program with Nueva Vista Center, and the Ocean Protectors program with Save Our Shores about the danger of plastic pollution.

- Continue to promote and sustain the Adam Webster Memorial Fund to serve cognitively challenged youth.

- Examples of sites and programs for community service projects.
Export Program Content

Objective: to increase number of youth served, broaden impact & protect ocean.

• Continue to export curricula, such as our national distribution with Pepper College Readiness Network.
• Promote watershed to the sea video for coastal and inland schools.
Maintain Organizational Quality

Objective: to continue high quality of the organization thereby maintaining and enhancing our resources and service delivery.

- Continue “greening” our facilities by reducing waste, water and carbon footprint as we have done w/our solar array.

- Stay apprised of legal developments as they affect non-profit organizations.

- Offer training and information for staff.
Strategic Plan Timeline:

January 1, 2019 to December 31, 2023
OSO Team

**BOARD OF DIRECTORS**: Bridget O’Neill, Chair; Tim O’Neill, President; Mike McCabe, Vice President-Treasurer; Nick Petredis, Secretary; Donna Blitzer; Rob Bremner; Jim Thoits, Jim Beckett, MD; Jack McLaughlin, PhD.

**IN MEMORY**: Jack O’Neill, Founder (1923-2017)

**STAFF**: Rachel Kippen, Executive Director; Laura Walker, Program Manager/Instructor; Patrice Riley, Bookkeeper; Nikki Brooks, Communications Coordinator/Instructor; Tim O’Neill, Skipper; Mike Egan, Skipper; Rich Gerling, Building Steward; Instructors: Joey Rodrigues, Julia Schubert, Lauren Hanneman.
Advisory Board

- Stephany Aguilar, Councilmember, City of Scotts Valley
- Jeff Alquist, Judge, Santa Cruz County Superior Court
- Blanca Alvarado, Santa Clara County Board of Supervisors (ret.)
- Albert Aramburu, Marin County Board of Supervisors, Director, California Conservation Corps (ret)
- Bruce Arthur, Capitola City Council (ret)
- Cliff Barrett, Scotts Valley City Council (ret)
- Celeste Basuino, Senior Vice President/Senior Financial Advisor, Merrill Lynch
- Steve Belcher, Chief of Police (ret), City of Santa Cruz
- Jess Brown, Executive Director, Santa Cruz County Farm Bureau
- Harry Edwards, Ph.D., City of Oakland Parks and Recreation Director (ret)
- Tim Fitzmaurice, Santa Cruz City Council (ret)
- Sister Julie Hyer, O.P., Administrator, Adrian Dominican Sisters, Dominican Hospital President (ret) & Salud Para La Gente President (ret);
- David Jochim; Senior Vice President & Manager, Union Bank of California
- Carl Keehn, Chief Financial Officer, O’Neill Australia
- Robert F. Kennedy, Jr., President, Waterkeeper Alliance
- John Laird, California Secretary of Resources
- David Terrazas, Mayor of Santa Cruz
- Rafael Lopez, Watsonville City Council (ret)
- Terry Medina, Chief of Police (ret), Watsonville Police Department
- Harvey J. Nickelson, President/CEO, Coast Commercial Bank (ret)
- Ellen Pirie, Santa Cruz County Supervisor (ret)
- Emily Reilly, Santa Cruz City Council (ret)
- Mike Rotkin, Santa Cruz Mayor & Counclimember (ret)
- Simon Salinas, Monterey County Board of Supervisors;
- Joe Simitian, Santa Clara County Supervisor;
- Bill Simpkins, Community Volunteer, Boat Owner
- Robert Stephens California Audubon & Elkhorn Native Plant Nursery
- Mark Tracy, Santa Cruz County Sheriff-Coroner (ret)
- Sam Farr, US House of Representatives, District 17
- Ana Ventura Phares, Mayor of Watsonville (ret.), Attorney
- Mark Stone, California State Assemblymember.
Significant donors

As of 7/1/2018, our donors of $10,000 + include:

For More Information:

Rachel Kippen, Executive Director:
(831) 465-9390
Rachel@oneillseaodyssey.org