

O'Neill Sea Odyssey



2019-2023 FIVE YEAR STRATEGIC PLAN
Approved by Board of Directors 9-17-2018



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.
- In 2004 OSO renovated education center and entire upstairs of O'Neill Building under a 25 year lease from the Port District. Jack O'Neill and Harry Hind donated the building to OSO in 2000, education center named for Jack O'Neill and Harry Hind.
- 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

Cash and cash equivalents	\$2,806,388
Accounts receivable	\$78,091
Prepaid expenses	\$11,425
Total current assets	\$2,895,904
Property and equipment, net	\$715,182
<i>Total Assets</i>	<i>\$3,611,086</i>

LIABILITIES AND NET ASSETS

Accounts payable and accrued expenses	\$12,818
Related party payable	\$21,828
Tenant Security Deposits	\$8,939
Total current liabilities	\$43,585
Unrestricted net assets	\$1,918,050
Temporarily restricted net assets	\$492,017
Permanently Restricted Net Assets	\$1,157,435
Total net assets	\$3,567,501
<i>Total liabilities and net assets</i>	<i>\$ 3,611,086</i>

Goals of 2019-2023 strategic plan

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.



Groundbreaking for O'Neill Building, 1965

- 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.

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.

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.




Marine Science and Conservation

O'Neill Sea Odyssey


MSC110 

K-12



Offsite: Marine Science and Conservation

O'Neill Sea Odyssey

MSC210 

K-12

- 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 Almquist, *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 & Councilmember (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:

American Honda Foundation, Anonymous Fund at the East Bay Community Foundation, Applied Materials Foundation, Bank Of America/Merrill Lynch, Basuino-Alvarez Household, Bremner Household, California Coastal Commission, California Department of Education, Cisco Systems Foundation, City of Capitola, City of San Jose, City of Santa Cruz, City of Scotts Valley, City of Watsonville, Bud and Rebecca Colligan, Comerica Bank, Community Foundation For Monterey County, Community Foundation of Santa Cruz County, Community Science Workshop – Sanger, County of Santa Clara, County of Santa Cruz, Cruzio, Leslie and Troy Daniels, David & Lucile Packard Foundation, California Department of Education, Devcon Construction, Inc., Dream Inn, Duke Energy, Dynegy, Ecology Action, Fitzpatrick Foundation, Frieda Fox Foundation, Fuller, Carol, Granite Construction Inc., Dan and Rebecca Haifley, Tim and Mary Haifley, Harden Foundation, Edelgard Heine, Herman Household, Intero Foundation, JSI, Barbara Karleen, Leo M Shortino Family Foundation, Don Listwin, Stephen Luczo, Ludwick Family Foundation, McCabe & Totah, Mike and Ann McCabe, Donald McCubbin, McKay Fund & Scott Fund Of The Community Foundation Of Monterey County, Michael Lee Environmental Foundation, Monterey Peninsula Foundation, Morgan Family Foundation, Motta Family, Nancy Buck Ransom Foundation, National Fish & Wildlife Foundation, Newman's Own Foundation, Nueva Vista Community Resources, Ocean Honda, O'Neill Associates, O'Neill Clothing, O'Neill Family, O'Neill Trademark Bv, Bridget O'Neill, Jack O'Neill, Pebble Beach Company, PG&E Foundation, Joe and Cheryl Pruss, Emily Reilly, Robert Stephens, Rotary Club of Santa Cruz, Salinas Valley Recycles, Santa Clara Valley Water District, Santa Cruz Seaside Company, Sharks Foundation, Sidney Stern Memorial Trust, Sierra Club Foundation, Sigma Alpha of Omega Nu, Bob and Carol Simpkins, Bill and Brigid Simpkins, Denny and Ramona Smith, Clarence Souza, Starbucks Foundation, State Coastal Conservancy, State Parks Foundation, System Studies, Team O'Neill, The Bright Horizon Fund At The CFSCC, The Cathleen Chandler Eckhardt & Terry Eckhardt Fund At The CFSCC, The Christensen Fund, The Joseph and Vera Long Foundation, The Lenore and Howard Klein Foundation, Inc., The Morgan Family Fund at the Silicon Valley Community Foundation, The Nicholson Family Foundation, The Robert S. and Grayce B. Kerr Foundation, The Stanley E Hanson Foundation, The Upjohn California Fund, Jim and Debbie Thoits, Toyota Foundation, Union Bank of California, United Way, Van Natta Family, Wells Fargo Foundation, West Marine, WeWrite LLC, Wildlife Conservation Board.

For More Information:



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