

O'NEILL SEA ODYSSEY STRATEGIC FRAMEWORK

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2026-
2030

O'NEILL
SEA
odyssey

THE OCEAN IS YOUR CLASSROOM.
EL OCÉANO ES TU AULA
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O'Neill Sea Odyssey Strategic Framework 2026-2030

Introduction:

For thirty years, O'Neill Sea Odyssey (OSO) has served as a bridge between the shore and the sea, transforming the lives of nearly 135,000 students through hands-on ocean education. Today, following a period of profound transformation and global challenge, we have reemerged stronger, more focused, and more vital than ever.

This process has been years in the making. Launched in 2023 with an organizational development grant from the Community Foundation of Monterey County, OSO began the process of reviewing our operational strengths, opportunities and cultivating the Board Leadership that would support the advancement of the program.

The prior Strategic Plan sunset in 2023. In early 2025, we began a rigorous process to assess our operating environment, reimagine elements of our strategic framework, and set goals to guide us over the next several years. It has been an energizing, inclusive and thoughtful process resulting in this strategic framework.

As we look toward the next five years, we are not merely maintaining our course; we are evolving to meet the demands of a changing world. This framework is our roadmap to resilience, ensuring that our mission, vision, and values are translated into measurable impact. Our guiding principles include:

Program Innovation: Change is constant. As our landscape shifts, so does the content we provide students. To ensure students are prepared to be the next generation of ocean stewards, we ensure students and their teachers don't just observe the ocean, but have the confidence to understand the complex patterns and ecological influences shaping its future.

Unwavering Equity: At a time when many communities face increasing barriers, OSO reaffirms its foundational promise: our programs will remain free and accessible. We are deepening our commitment to diversity, ensuring every student—regardless of background—finds a place on the water.

Climate Resilience: With the rapid advancement of impacts of climate change, including sea-level rise, strengthening coastal storms and the quickly developing conditions within the Santa Cruz Harbor, the following are the strategies to manage the ever-evolving, environment of great uncertainty at all levels in our community – for individuals, families, organizations, businesses, government, and others.

This document is more than a plan; it is a living guidebook. Each year, we will refine our tactics, apply lessons learned, and adapt to the evolving needs of our community. It provides the clarity our staff, board, donors and partners need to work in concert toward a singular, enduring purpose.

Jack O'Neill famously reminded us: “**The Ocean is Alive... and we’ve got to take care of it.**” This framework is our commitment to doing exactly that. Through innovation, inclusion, and action, O’Neill Sea Odyssey will continue to protect our living ocean by inspiring the next generation of its guardians.

Tagline:

The Ocean is YOUR Classroom.

El Océano es Tu Aula

Mission

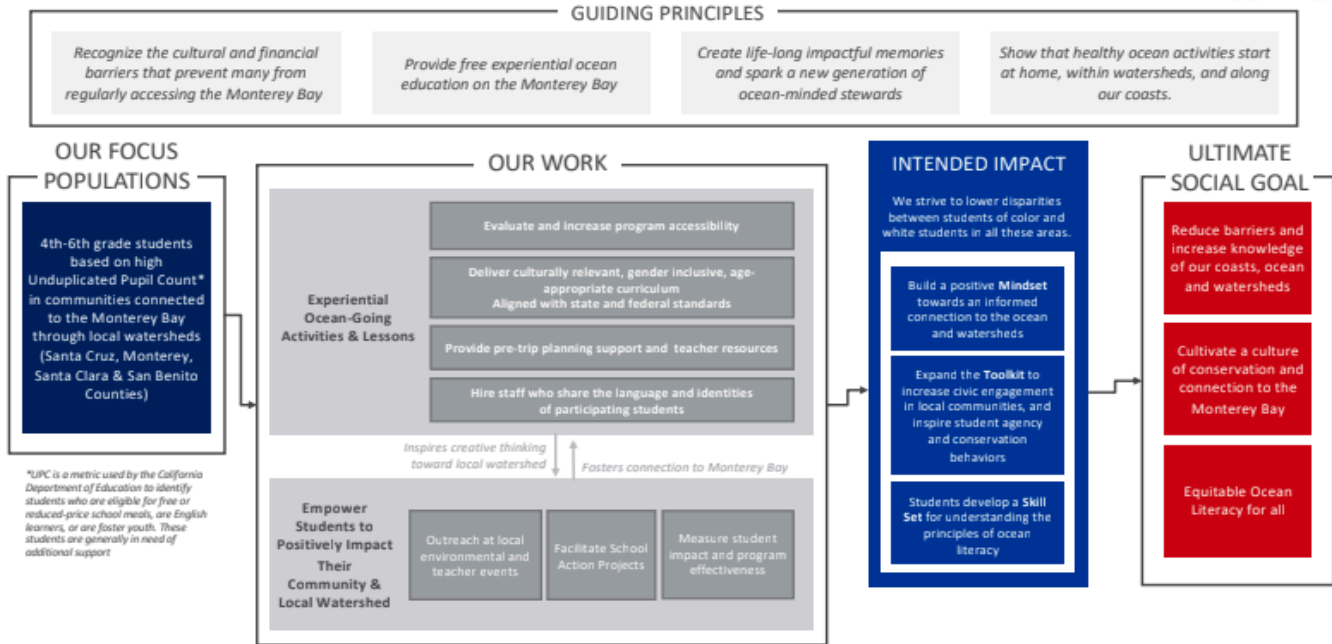
O’Neill Sea Odyssey provides free and transformative ocean-going educational experiences to students from diverse backgrounds, igniting their scientific curiosity and empowering them to take action to protect our oceans and watersheds.

O’Neill Sea Odyssey ofrece experiencias educativas gratuitas y transformadoras en alta mar a estudiantes de diversos orígenes, despertando su curiosidad científica y capacitándolos para que actúen en la protección de nuestros océanos y cuencas hidrográficas.

Organizational Theory of Change

In 2023 O’Neill Sea Odyssey received an organizational development grant through the David and Lucille Packard Foundation to participate in that year’s Strategic Leadership Accelerator Cohort through Bridgespan. Throughout the four month process, a core team of board and staff leadership worked to refine and update our organization’s Theory of Change. The Theory of Change provides a narrative that outlines barriers that O’Neill Sea Odyssey is addressing and the impacts upon the participant - in the short and long-term.

O'Neill Sea Odyssey Theory of Change



This process provided the foundation to move forward with clarity and unified vision.

Strategic Planning Process

The preparation of the plan was led by the O'Neill Sea Odyssey Executive Director, Senior Staff, and two board members. Additionally, this process was completed with the support of the Stanford Alumni Consulting Team (ACT).

The Stanford Alumni Consulting Team matches consultants with nonprofits that are facing strategic challenges. Working with small and mid-sized organizations, the Stanford Alumni team provides pro-bono support to develop a deep understanding of organizational dynamics. This includes decision-making, and change implementation, before making recommendations that ultimately help clients achieve their most ambitious goals.

The following were the major steps of our process:

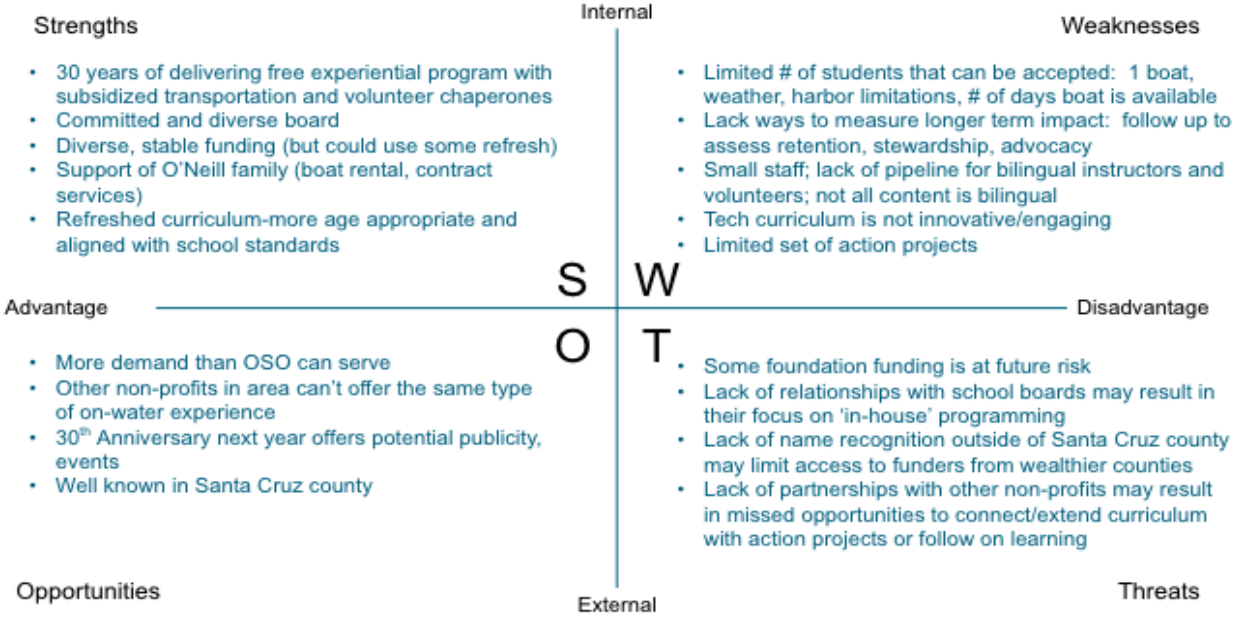
Timeline:

- **January 2025:** OSO selected as organization to participate in Stanford Alumni Consulting 2025 cohort.
- **February - March 2025:** Regular meetings between Stanford Consulting Team and OSO Executive Team.

- **April - June 2025:** SWOT Analysis and Interviews Completed by Stanford Consulting team of OSO Board Leadership.
- **July - September 2025:** Finalize Strategic Priorities.
- **October - November 2025:** Staff Review and bring to O’Neill Sea Odyssey Board of Directors during the November 2025 Board Meeting to review and discuss Strategic Priorities.
- **January 2026:** Strategic Planning Committee meets to review structure and approve the alignment of organizational goals and strategic plan framework.
- **February 2026:** Draft Strategic Plan is presented to the O’Neill Sea Odyssey Board of Directors at the regularly scheduled meeting, for feedback and discussion.
- **February - March 2026:** Revision and creation of operational strategies for Strategic Planning
- **March 2026:** OSO Strategic Plan Finalized and approved during annual Board Retreat.

SWOT Analysis:

Stanford Alumni Consulting Team conducted interviews with each member of the O’Neill Sea Odyssey senior leadership team and members of the organization’s Board of Directors. Following summarizes the reflections collected and used to formulate the Strategic Goals for the next three to five years.



The new Strategic Outline for the future of the O’Neill Sea Odyssey will guide the staff and Board in critical decision-making and ensure we align our resources and activities to achieve the best outcomes for our community. By creating an outline, it will continue to strengthen the partnership between OSO Staff and Board Leadership to ensure that this plan results in a plan that is “owned” by everyone; we are all responsible for executing it. Additionally, the Strategic Outline will allow donors and partners to

clearly engage with the O'Neill Sea Odyssey and serve as a guiding document to help understand how their contributions and support will help guide and strengthen the outcomes of the organization.

How to Use This Document:

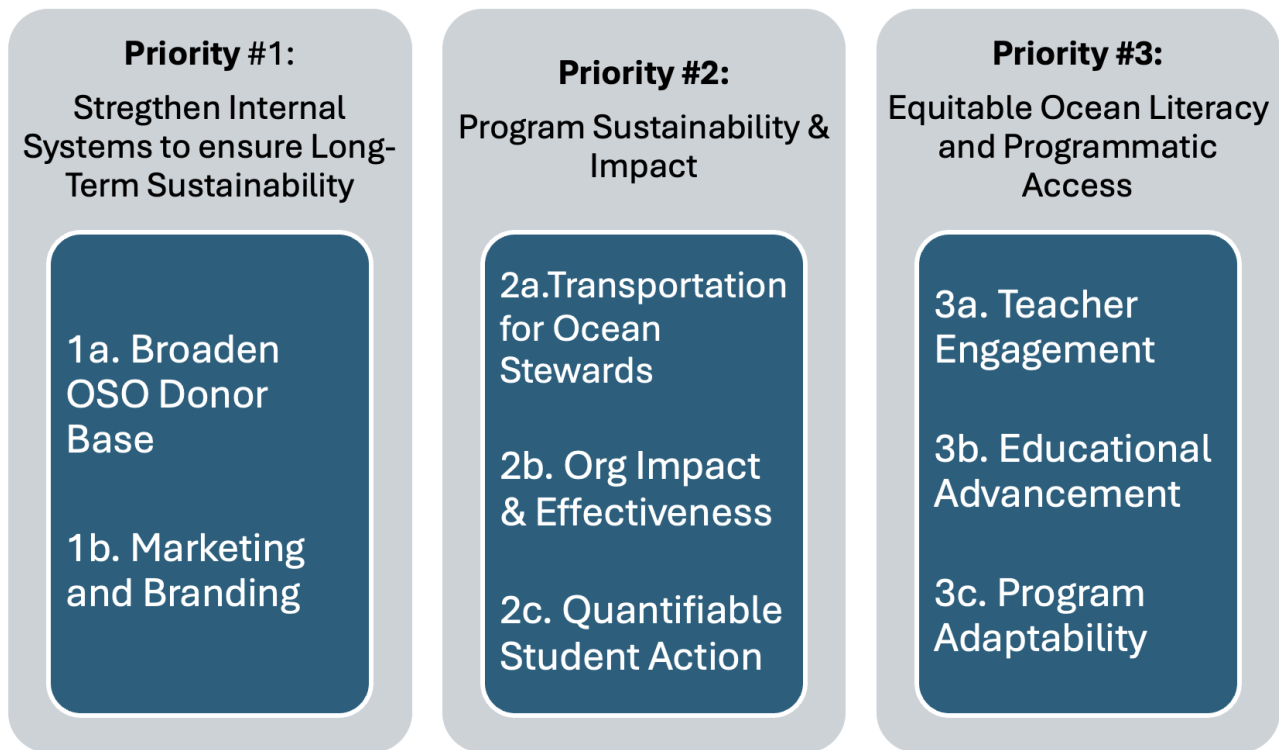
Having reached our maximum capacity for student volume, this signals a strategic shift from breadth to depth. The current landscape and the strong programmatic foundation have caused the O'Neill Sea Odyssey leadership to consider: how do we deepen our impact? How can we ensure our long-term ability to provide sustainable services? Together, organizational and board leadership crafted the following plan that outlines bold initiatives to strengthen our internal systems, examine our programmatic framework, and expand the services to our core stakeholders. We are confident it will be our guide for the O'Neill Sea Odyssey as together we work towards creating a thriving community where everyone has access to hands-on ocean education.

Each Strategic Priority outlines the need, opportunity and how work in this area will impact the O'Neill Sea Odyssey organization. While suggested activities are included, it is intended that organizational leadership will annually review the landscape, lessons learned from the prior year and the opportunities currently available. O'Neill Sea Odyssey acknowledges that the political and economic landscape is rapidly changing. This document was designed to ensure our ability to adjust and pivot based on the current landscape and state of ocean education, environmental education and environmental policy. Activities are representative of the current ideas generated by the Strategic Planning team but acknowledge this is not an exclusive list and will be adjusted based on lessons learned.

Strategic Planning Team:

Tracey Weiss, OSO Executive Director and Project Lead
Rob Bremner, OSO Board Chair
Lynda Tran, OSO Board Member at Large
George Dies, Stanford ACT Consultant
Hui Lancaster, Stanford ACT Consultant
Abby Newman, OSO Program Manager
Elizabeth Murphy, OSO Finance and Operations Manager
Shannon Low, OSO Community Engagement Coordinator

Strategic Framework Overview



Strategic Goals and Objectives

Strategic Priority #1: Strengthen Internal Systems to Ensure Long-Term Sustainability

Introduction:

Building on our vision to foster an ocean-literate generation, O'Neill Sea Odyssey is committed to strengthening the internal systems that serve as our foundation. By optimizing our resources, we can better support youth across the Monterey Bay and the vast watershed communities connected to it. As we engage a new generation of donors, we aim to build localized partnerships that ensure every community has the direct resources needed to support its own students' education.

Thirty years of hands-on ocean education has established the O'Neill Sea Odyssey as a keystone of the Monterey Bay. However, as our programs and our community evolve, so must our voice. We are embarking on a comprehensive brand update to better reflect the faces and aspirations of today's youth. By modernizing our imagery and narrative, we will spark the interest of new partners and ensure our visual identity is as dynamic and inclusive as the education we provide on the water.

Goals:

1a. **Broaden OSO Donor Base:** Build a representative and resilient donor base by scaling major gift programs in our primary service areas. Our focus will be on diversifying our funding pipeline and prioritizing the acquisition of younger, geographically diverse donors to ensure our financial infrastructure reflects the communities we serve.

- Total money raised in each of the three primary counties served by O'Neill Sea Odyssey should support classes served from that region annually. The goal is to have a minimum of 25% of the classes served for Monterey, Santa Cruz, and Santa Clara respectively.

1b. **Marketing and Branding:** Modernize and elevate O'Neill Sea Odyssey's brand identity to reflect our evolving mission, ensuring our messaging resonates with diverse new stakeholders and reinforces our position as a leader in hands-on environmental education.

- Achieve a 20% increase in the number of corporate and community partnerships and donations through the launch of a new identity campaign.
- Develop a new brand and collateral aligned with new visual communication components. (social media, collateral, templates, etc)

Initiatives:

- Board Training regarding Major Giving.
- Prospecting New Donors
- Comprehensive New Brand Guide Document development.
- Board Development. Creating representative leadership of the communities and demographics of schools we serve with the networks needed to raise to the necessary reserves.

Strategic Priority #2: Program Sustainability & Impact

Introduction:

Since our inception, O'Neill Sea Odyssey has been dedicated to a singular mission: ensuring the ocean is a classroom accessible to all, regardless of economic standing. Today, we recognize that removing the cost of the program is only the first step; true accessibility requires us to mitigate the evolving educational and logistical hurdles that prevent students from fully engaging with the Monterey Bay. By prioritizing the reduction of these barriers, we aim to enhance the quality of our impact for the diverse youth we serve, ensuring OSO remains a relevant, inclusive, and transformative experience for the next generation of ocean leaders.

Each year, we hear countless stories from participating students and educators regarding the life-changing experiences gained from participating in the O'Neill Sea Odyssey program. We measure the short-term impact annually, and the mid-term impacts with Lauren Hanneman in 2013. Today, as we evolve, we are called to update the instruments and methods to continue to collect and demonstrate what we know ... *"The Ocean is Alive... And we've got to take care of it"*.

Goals:

2a. Transportation for Ocean Stewards: Strengthen and scale the O'Neill Sea Odyssey Transportation Scholarship Program to eliminate transit-related barriers, ensuring that geographic distance and rising fuel costs do not prevent socioeconomically disadvantaged schools from accessing our coastal classroom

- Evaluate the Ocean Stewards Transportation Scholarship Program to ensure that 100% of classes from schools with 60% or more socioeconomically disadvantaged students have access to a scholarship covering 85% of the cost of a school bus for attending the OSO field experience.
- By 2030, complete a comprehensive review of the Ocean Stewards Transportation Program and develop a business strategy that will lead to sustainable funding and operational strategies to ensure long-term access for transportation support for schools with 60% or more socioeconomically disadvantaged students.

2b. Organizational Impact and Programmatic Effectiveness: Establish a rigorous, data-driven framework to measure program effectiveness, combining quantitative academic outcomes with qualitative teacher, staff and student narratives to continuously improve our curriculum and demonstrate the transformative power of the O'Neill Sea Odyssey experience.

- Implement new student pre-trip and post-trip surveys that measure knowledge, attitudes, and behaviors.
- Implement a new teacher survey that captures the utilization and effectiveness of the pre-trip materials, qualitative feedback on student learning and engagement, and insights for program improvement.

2c. Quantifiable Student Action: Formalize and scale the 'Student Action' phase of the OSO experience by creating structured pathways and measurable metrics that incorporate teacher time and resources and empower students to apply their ocean literacy through tangible environmental service and advocacy within their own communities and watersheds.

- Identify three to five high-impact projects with clear, quantifiable metrics, aiming for a 100% teacher submission rate to measure the second tier of program impact.
- Develop a system to collect, organize, and visualize Student Action Project metrics.

Initiatives:

- **Explore Pathways to Reduce Costs**
 - Partnership development
 - Build partnerships with school districts
 - Adopt-a-Bus program
 - Support Metro partnerships - public transportation
- **Consider Overall Program Guidelines:**
 - Scholarship Amount
- **Explore Pathways to Increase / Stabilize Funding**
 - Transportation Endowment
 - Purchase Bus and Look at Secondary Revenue Stream

Strategic Priority #3: Equitable Ocean Literacy and Programmatic Access

Introduction:

To cultivate the next generation of ocean stewards, we must move beyond awareness toward deep, actionable literacy. This priority focuses on strengthening the tools and resources that transform a single day on the Monterey Bay into a lifelong commitment to the environment. Recognizing that a healthy ocean begins in our own backyards and inland watersheds, O'Neill Sea Odyssey is deepening our educational tools and resources to foster a climate-resilient future.

By enhancing the rigor and confidence of educators to utilize our curriculum, we ensure that every student leaves our program with the connection and understanding necessary to protect our coast for the next thirty years and beyond. We are dedicated to evolving our curriculum and logistics to meet the specific needs of our racially and socioeconomically diverse student body, ensuring that every student doesn't just attend, but thrives and finds belonging in marine stewardship.

Goals:

3a. Strengthen Teacher Engagement: Elevate the educational impact of the O'Neill Sea Odyssey experience by increasing teacher utilization and confidence in our pre-trip curricula, ensuring that every student arrives at the coast with a strong foundational understanding of marine science and environmental stewardship

- 95% of teachers will report moderate to high confidence in delivering OSO pre-trip curricula, as measured through post-program teacher surveys.
- 90% of students/teachers will engage with and complete the pre-trip curriculum.

3b. Education Advancement: Enhance the O'Neill Sea Odyssey experience by integrating multi-linguistic resources, ensuring that students of all backgrounds feel a sense of belonging and see themselves reflected in the narrative of ocean stewardship

- Ensure that 100% of O'Neill Sea Odyssey's pre-trip, post-trip, and core curriculum materials are accessible in Spanish.
- Build a bilingual education team, with at least 50% of staff proficient in Spanish.

3c. Program Adaptability: Develop a flexible model and versatile educational program that delivers high-impact learning experiences while responding to changing environmental conditions and various needs of groups being served. Ensure the program can be seamlessly adapted to meet the diverse needs of all student groups.

- Design and implement a dedicated special education curriculum and teacher survey for OSO programs.
- Achieve at least 90% positive survey feedback from participating special education teachers.
- Enhance dockside educational programs by updating curriculum and instructional materials to achieve at least 90% positive feedback from participating students and educators.

Initiatives:

- **Partnership Development**
 - Partnering with Santa Cruz County Parks and Recreation
 - Partnering with the County Office of Education - Special Education Departments Staff Retention

- **Professional Development & Classroom Support**
 - Build tools to support formal educators in building confidence in understanding and implementing climate education into their classrooms.
 - Conduct annual professional development workshops to support formal educators with O'Neill Sea Odyssey pre-curriculum lessons.
 - Bilingual Curriculum: Look at tools for field translation & classroom learning

Acknowledgement and Appreciation

We thank our participants, staff, Board, partners, and other stakeholders who contributed so much to this plan. The O'Neill Sea Odyssey was built on the core value that ocean education should be free and accessible. Together, we are working to not only introduce, but to deepen and improve ocean education for youth in our community. This process engaged countless members of our community. We are grateful for their guidance, leadership and support:

Jack O'Neill: To our Founder and the visionary who created the O'Neill Sea Odyssey. Thank You. Your incredible vision has created the opportunity for over 135,000 youth to access the Monterey Bay. Your floating classroom has inspired educators, future marine scientists, and the next generation that will protect and preserve this dynamic coastline. We are who we are today because of you.

O'Neill Sea Odyssey Board of Directors: Thank you to the Strategic Planning Committee and the O'Neill Sea Odyssey Board Members at Large for their willingness to contribute to this process. Together we envisioned a future that aligns with our guiding principles to eliminate the barriers that prevent many from accessing and understanding our coasts and ocean. Your vision and commitment is an inspiration.

Current O'Neill Sea Odyssey Board of Directors:

- Rob Bremner, Board Chair
- Mike McCabe, Treasurer
- Brad Boardman, Secretary
- Tim O'Neill, President
- Dr. Megan Goddard
- Nicholas Petredis, esq
- Bridget O'Neill
- Jim Thoits
- Dr. Seth Gustafson
- Lynda Tran
- Katie Fairbairn

Stanford Alumni Consulting Team: Thank you to George Dies and Hui Lancaster for their thoughtful leadership throughout this process. Thank you for challenging us throughout the process and creating a meaningful plan to build a successful future for the O'Neill Sea Odyssey organization.

We are grateful for the Monterey Bay Sanctuary, and our Ocean Classroom. Class is in session - we look forward to seeing you soon.