



CAMPAIGN PRIORITIES

For the

OREGON COAST AQUARIUM

The Oregon Coast Aquarium board and leadership team devoted 2016-2017 to strategic planning. An extensive list of ideas was honed into capital and operating priorities that would advance its strategic goals, build partnerships and inspire significant philanthropic investment in the Aquarium's future. The priorities defined for the Aquarium's capital campaign include:

Remodel the Entryway/Grand Hall/Café

Create Children's NaturePlay Area

Improve Three Indoor Galleries

Enhance Sustainable Education Programming

Build a Marine Wildlife Rehabilitation/Education Center

CAMPAIGN PROJECT NARRATIVE

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WEBSITE: www.aquarium.org
501(C)(3) EIN #: 93-0877807
YEAR ESTABLISHED: 1984

MISSION: Our mission is to create unique and engaging experiences that connect people to the Oregon coast and inspire ocean conservation.

HISTORY/BACKGROUND: The Oregon Coast Aquarium was founded in 1984 as a 501(c)(3) nonprofit organization located on 19 acres on the Yaquina Bay estuary in Newport, Oregon. Since opening in 1992, it has welcomed more than 14 million visitors from around the world. In the late 1990s, the Aquarium was home to Keiko, the Killer Whale, until his release into the Nordic seas. It is the only aquarium in Oregon accredited by the Association of Zoos and Aquariums (AZA), maintaining this designation since 2001.



SERVICE PROVIDED: The Oregon Coast Aquarium is a captivating destination and a trusted resource for ocean education and conservation in the Pacific Northwest. Aquarium staff possesses a deep passion for the environment, and the knowledge to maintain a diverse wildlife collection in varied indoor and outdoor exhibits: 15,000 animals from 259 species reflect the diverse, vibrant ocean life, filling 1.8 million gallons of water in tanks throughout the premises. Visitors can touch anemones in tide pools, explore bio-facts, see delicate jellies illuminated, and watch pelican presentations. Groups may book overnight programs, sleeping among the sharks, rays and fishes traversing *Passages of the Deep*.

The Oregon Coast Aquarium serves as a living classroom for people of all ages. Early childhood nature play programs rotate preschool children, with parents, through self-directed stations where they learn skills in observing, listening, discerning and exploring. The Aquarium offers professional development workshops throughout the year that provide pedagogical strategies and marine science content for teachers, schools and districts that meet Next Generation Science Standards and national Ocean Literacy Principles.

Outreach education programs take the Aquarium on the road to schools throughout the west where distance and limited budgets preclude field trips. Outreach teams present to thousands of students and teachers each year in low-income, rural, remote or tribal schools in Oregon, Washington, California and Idaho.

POPULATION SERVED: Of the average 411,000 people who visited the Aquarium last year, 4% are Lincoln County residents, 58% are from other Oregon counties, 25% from the Portland metro area, 35% live outside of Oregon, and 3% are International. Of all visitors, 31% are children under 17, 29% are adults 18-24, 30% are adults 25-64, and 10% are seniors 65+.



Of the 62% of visitors who reside in Oregon (population 3,831,074):

- 83% are white, 17% minority (11% Hispanic, 2% Native Tribes, 3% Asian, 1% other)
- 41% of families are low-income, 17% live in poverty
- 4.9% are LGBT, the 4th highest state in the US

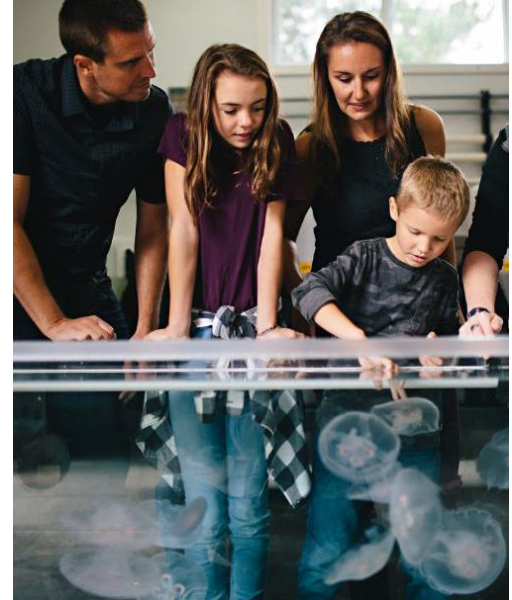
Of the 4% of visitors who are Lincoln County residents (one third of the 46,000 pop. visit):

- Median household income is \$42,100 (18% below the State's median),
- 46% of families are low-income, 17% live in poverty,
- 13% are minority (7% Hispanic, 3% American Indian, 1% Asian),
- .5% of family head of households are male and male partner
- .4% of family head of households are female and female partner
- 34% are aged 60+
- 47% of resident children are born to unwed mothers
- Only 24% of adults possess a college degree
- Lincoln County School District has 11 public and 3 charter schools with 5,000 students enrolled. All are Title I schools: families face economic and social challenges imposed by changes in rural economies as well as evolving demographics that include greater numbers of ESL learners.

In addition to general public admissions this past year:

- 10,828 field trip students who went on self-guided tours and had access to our self-guided tour materials and interpretive volunteers.
- 3,067 children participated in an overnight program, meeting our husbandry staff, participating in hands-on activities and taking behind the scenes tours.
- 24,280 students and 970 teachers in 101 schools participated in our outreach program. Our goal is to reach schools with youth who do not have the financial or logistical capacity to get to the coast so we offer a sliding scale scholarship program.
- 406 Oregon teachers attended Aquarium trainings, including 245 who attend our Oregon Coastal Learning Symposiums.
- 50,329 teens, pre-teens and educators were virtual users of our *Oceanscape Network* distance learning program. ON encourages and supports nature exploration, marine science in the classroom and engaging with real-time science.
- 725 preschoolers attended *Aquatots*, our early education program, which is free with admission and focuses on nature play; creating a connection between our youngest guests and the natural world.

- The Aquarium recruits and trains a legion of 390 volunteer interpreters, divers, educators and animal care providers who serve more than 43,000 hours to keep the Aquarium open 364 days a year.
- 2000 K-12 students and interns have lab experiences with educators, 9 interns work with animal curators, 39 youth volunteers explore careers in marine science.
- 220 stranded or injured marine wildlife animals receive urgent and rehabilitative care at the Aquarium.



WHY THE AQUARIUM IS IMPORTANT

The Oregon Coast Aquarium was developed by the Yaquina Bay Economic Foundation to draw tourism, facilitate oceanic research and education, and bring economic prosperity to the community. The Aquarium is perfectly situated on the Oregon coast to attract visitors, but its mission has much further implications:

1. **Economic Impact** - Economic conditions in rural parts of the state have declined as timber, fishing and other industries have vanished, and employment in service industries pay lower wages. The Aquarium supports a large tourism industry, and has improved the Lincoln County economy as 96% of its visitors are non-residents - contributing an estimated \$86 million (from Newport Chamber of Commerce) to local businesses and supporting hundreds of jobs each year. Half of the world's population lives in coastal zones, and all rely on the sea to sustain a global economy, transport goods, provide food, and oxygenate the air we breathe.
2. **Education** – Humans as a species have advanced because of their ability to reason, challenge themselves to discover and learn, and adapt using creativity and critical thinking. Jobs of the future will require greater numbers of people in science disciplines. The Aquarium plays a significant role in both scientific inquiry and exploration. More than a tourist destination; it is a vital STEM education resource for hundreds of school groups who visit each year, and thousands of students in rural communities who benefit from our outreach education. Aquarium education programs inspire children to learn and discover more about their world outside their classroom, and emphasize the ripple effect of humans on the ecosystem in which they live. Multi-sensory curriculum, facilitated by the Aquarium’s educators, aligns with state and national education standards, as well as national ocean literacy principles.
3. **Environment** - The sea is a major force on the planet; home to over a million known species of plants and animals, producer of half of the oxygen in the earth’s atmosphere, sustainer of natural resources, and regulator of the world’s climate. Through the Aquarium, children and adults alike learn the interdependence of all species, as well as the significance of their decisions on the environment, their food sources, and ultimately their future survival. Whether engaging youth volunteers in beach clean-ups, raising awareness about plastic pollution among restaurants, identifying species for curious citizens, or informing media about rescue and rehabilitation efforts, the Aquarium is viewed as a leader in environmental stewardship and marine education.

Entertainment - The Aquarium is frequently rated by travel writers as one of the top ten aquariums in the U.S. because of its naturalistic marine life exhibits, educational programming, and strong sense of place on the Pacific coast. Special exhibits added every two years keep the experience fresh for visitors of all ages, and maintain admissions. Most notably are the *Shipwrecks* and *Big Bites* exhibits. In May 2019, *SeaPunk — Powered by Imagination* - will be unveiled.

STRATEGIC PLANNING: Leading up to its 25th anniversary, the Aquarium embarked on a strategic planning process that would set a course for a transformational, progressive, yet sustainable evolution. With support from a philanthropic consulting firm, the Aquarium sought the wisdom of varied stakeholders: its board, staff, volunteers, charter members, businesses, foundations, philanthropists and community leaders who have invested in the Aquarium's mission. The findings from focus groups and private interviews suggested three strategic initiatives:



- 1. Deliver Memorable Experiences** - Providing great guest experiences is a proven strategy for attracting visitors, creating repeat visitors, growing membership, and increasing stay time - all important ways to add to the bottom line for both mission and revenue. The Aquarium should:
 - Enhance and increase guest interactions
 - Create personalization of experiences
 - Refresh and add exhibits and interpretation and strengthen connection to the outdoors
 - Further develop programming to extend the experience beyond the facility
- 2. Create a Compelling Sense of Place** - The Oregon Coast is imbued with a strong sense of place, and the Aquarium is perfectly situated and designed to capture it. Therefore, the Aquarium might:
 - Begin the experience at the entry
 - Create connections to the pond and estuary
 - Reimagine amenities to align with mission
 - Expand and maintain a diverse animal collection
- 3. Be a Recognized Authority** - Being a recognized authority and trusted resource for the health of the oceans is a bold but achievable vision for the Aquarium; awareness opportunities could:
 - Share stories of caring and conservation
 - Develop authority brand around core conservation focus areas
 - Demonstrate animal care best practices
 - Nurture partnerships with the community
 - Serve a resource role on regional conservation issues

STAFF & VOLUNTEERS: STAFF & VOLUNTEERS: The Oregon Coast Aquarium employs 75 full-time and 35 part-time/seasonal staff (84FTE). The Aquarium recruits and trains a legion of 390 volunteer interpreters, divers, educators and animal care providers who serve more than 43,000 hours to keep the Aquarium open 364 days a year. The administration includes senior staff with decades of professional experience:

Carrie E. Lewis, President/CEO, joined the Aquarium staff as Events and Sales Manager in September, 1995, and was promoted to Director of Sales and Marketing in 2004. She later served as Interim President of the Aquarium from February-September 2009, then assumed the duties of President/CEO in September 2010. As President/CEO, Lewis works closely with the Board of Directors, formulating the strategic direction of the Aquarium. She has general oversight of all properties, including living specimens and direction of staff and volunteers, and all organization activities. Lewis possesses a BA in Communications and Art History from St. Mary's College, California.

Richard H. Goulette, Chief Financial Officer, manages finance, technology and facility operations. He has worked for the Aquarium since 1991. He possesses a BS degree in Accounting from Central Connecticut State University, and has 30 years of experience in finance. Goulette oversees the annual independent audit of the organization's income, expense, reserves and assets.

James M. Burke, Director of Husbandry, worked in marine science for 6 years prior to joining the Aquarium in 1997. He supervises staff and volunteers who attend to the wellbeing of the Aquarium's animal collection. He possesses a BS degree in Marine Biology from University of Rhode Island, and advanced diver certifications. He collaborates with an expansive network of veterinary, non-profit and governmental agencies to provide critical care and rehabilitation of stranded or injured wildlife.

Kerry Carlin-Morgan, Director of Education, earned her Ph.D. in Wildlife Conservation and Science Education Instruction and Curriculum from University of Florida, and has decades of experience in science education and project management. She has been on staff at the Aquarium since 2005, and leads volunteer recruitment, interpreter and professional education staff trained in curriculum content, pedagogy, and evaluation.

Molly G. Dumas, Director of Development/Campaign Manager, has been raising awareness and millions of dollars in grants and private funds for local and international non-profits since 1988. She oversees a \$18.2 Million capital campaign, secures annual grants and appeals for programs and projects, and develops strategies for memberships and planned gifts. She earned her BA in Art from Elmhurst College in Chicago.

PARTNERSHIPS: The Aquarium is an active partner in the regional STEM learning network. We work collaboratively with many other educational institutions to leverage resources, and provide unique and transformational experiences for students from pre-K through college. The Aquarium's education program – including professional development, resources and distance learning opportunities - align with ocean literacy and national science standards.

The Aquarium is also fortunate to be located in close proximity to several scientific and educational organizations, including: OSU Hatfield Marine Science Center, Oregon Coast STEM Hub, Oregon Sea Grant, U.S. Fish and Wildlife, Oregon Coast Community College, and Lincoln County School District. As a collective, these organizations provide valuable formal and informal marine science education to

the public. This collaboration ensures symbiotic programs impart a breadth of information, and increase the knowledge and understanding of the marine environment.

Behind the scenes of the Aquarium’s exhibits and programs is a network of wildlife agencies whose volunteers, staff and medical professionals provide a safety net for the ocean’s most vulnerable species. Working in tandem with organizations across the country, the Aquarium provides critical care to rescued or injured birds, aquatic mammals and other endangered marine animals. The Aquarium strives for eventual release of wildlife, except when survival necessitates they remain in our stewardship.

EVALUATION: The Oregon Coast Aquarium is the only aquarium in Oregon accredited by the Association of Zoos and Aquariums (AZA), which has been maintained since 2001. The Aquarium is among 200 institutions that meets the AZA professional standards in animal care, provides a fun and educational family experience, and dedicates resources to scientific research, conservation, and education programs. AZA's standards for animal management and care include: living environments, social groupings, health, and nutrition, as well as enrichment, which stimulates each animal's natural behavior and provides variety in their daily routine. AZA reviews the Aquarium’s animal husbandry program, involvement in conservation and research, education programs, safety policies and procedures, security, physical facilities, guest services, institutional finances, the governing authority and organizational support. The Aquarium is annually reviewed by the American Academy of Underwater Sciences, the State Department of Environmental Quality, and the local Health Department. Periodically, the Aquarium contracts, or participates in various evaluations. These have included: summations of special exhibits, economic impact studies, energy audits and recyclable waste studies.

FINANCIAL: The Oregon Coast Aquarium fiscal year runs October 1-September 30. The Aquarium adheres to FASB accounting standards, and financials are audited annually by independent certified public accountants Gary McGee & Co., LLP. The Aquarium maintains lease agreements with Port of Newport and Newport Urban Renewal Agency for the lands under its facilities for \$1 one-time rental payment. The Aquarium is carrying no debt other than a 2005 Series A Revenue bond loan, now less than 8.5 M, obtained to finance original construction. The Aquarium is ahead of schedule to pay down the bond, and no campaign monies will be used to pay down the bond. The Aquarium receives no government funding, and relies on fees, grants, and undesignated funds from admissions and membership to run programs. Most grants are sought for special projects, exhibits or program service delivery to specific populations (i.e.: outreach transportation to a geographic area or low-income populations).

FINANCIALS for previous years	Actuals FY 2016-17	Actual FY 17-18	Budget FY 2018-19
Organization Revenues	\$9,652,353	11,271,955	\$10,042,215
Organization Expenditures	\$9,000,381	9,440,760	\$9,541,387
Operating Surplus (Deficit) (incl. Capital Campaign)	\$651,973	1,831,195	\$500,828

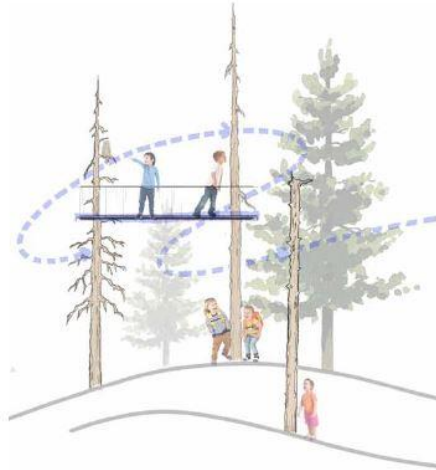


REMODEL THE ENTRYWAY/GRAND HALL/CAFE

A visitor's experience - from the parking lot to admissions, and through to the first exhibit - should be a crescendo of nature. The Aquarium intends to: re-landscape and remodel the pathway leading up to its entrance to improve wayfinding; accelerate the gateway admissions process by building a ticketing addition to the main building; remodel the Grand Hall to visually connect the interior with the estuary, introduce educational and artistic elements to the café that reference sustainable fishing in the Pacific, and expand its multiplicity to accommodate various large groups. Structurally, the Entry/Grand Hall will remain much the same, with some modifications. The bank of windows on the southwest end will be replaced by doors to afford greater accessibility and bring the outside in. From the new doorway of the Grand Hall, visitors will be able to view the estuary through a clearing in the forest, a new Children's NaturePlay area, outdoor seating, and a new outdoor headwaters feature all at once. The Café entryway will be widened to accommodate a new large exhibit teeming with marine life, increase indoor seating, and improve outdoor dining.



Inspiration



Play elements



1. CREATE A CHILDREN'S NATUREPLAY AREA

The Aquarium was built on a mill site on Yaquina Bay. A former playground along the south nature trail will be replaced, greatly expanded, and pay homage to its historic origins in the timber industry. New facilities, outdoor climbing features, natureplay components and interactives will engross children in the wondrous outdoors, inform them about sustainable forestry and its ecosystem, and engage them

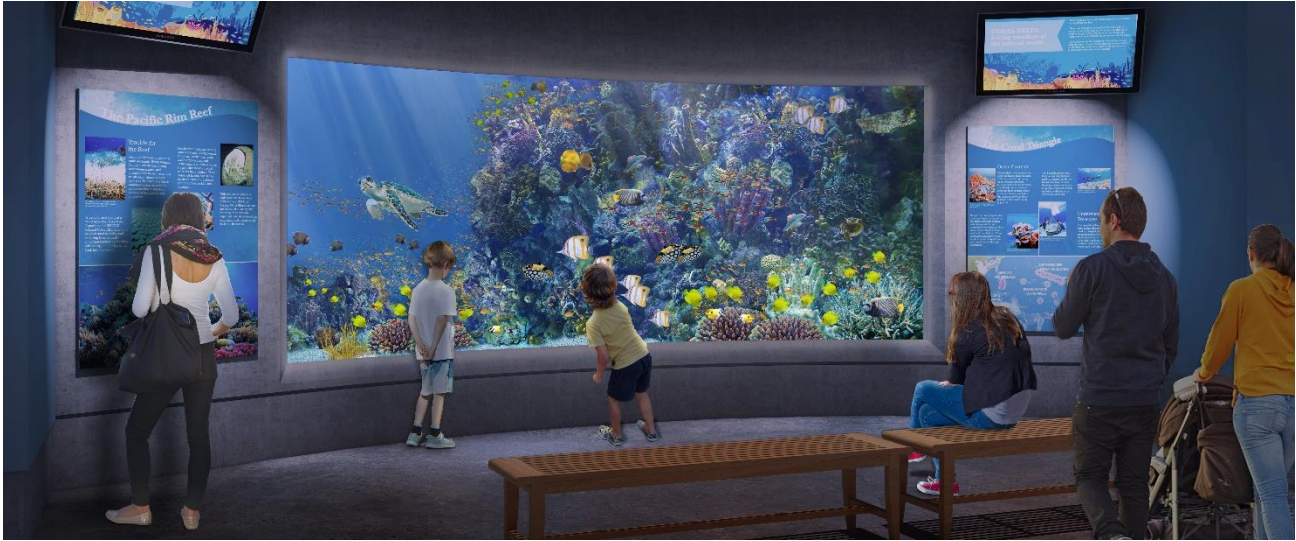
kinetically and educationally with nature. Children will be able to scramble atop - and through - massive logs, climb a tower to view a nest, slide down a mock river chute, and crawl through tunnels to view organisms and forest creatures. The surrounding grounds will accommodate seating for parents adjacent to Café seating, and include an estuary viewing deck. Further down the nature trail, a new outdoor amphitheater will facilitate large group seating for animal presentations. A deck will surround a magnificent spruce tree at the end of the trail.

Inspiration



Play elements





IMPROVE THREE INDOOR GALLERIES PROJECT:

Oregon and the nation have changed dramatically - both socially and culturally - since the Aquarium opened its doors in 1992. The industrial one-size-fits all model in common use when the Aquarium was designed no longer meets the needs of our diverse population. The Aquarium's strategic plan calls for a systematic approach to reaching new audiences and making the organization more inclusive. Rather than identifying a singular adaptation (i.e. adding bilingual signage), the Aquarium consulted other zoos and aquariums and exhibit designers, and conducted our own guest surveys to learn who is visiting and what they absorb from the exhibits.

Through master planning, we identified three important concerns: 1) the need to accommodate and communicate to a more diverse audience inclusively and equitably (i.e. physical disabilities, learning challenges, ESL, income disparity, and age); 2) rerouting visitors so they do not miss sections of the three galleries; and 3) develop a continuous narrative about the Oregon Coast through all three galleries and incorporate conservation messaging. We plan to make some structural modifications to improve traffic flow and back-of-house access to exhibits, upgrade or replace some of the exhibits and life support, reinterpret the marine life, change signage and incorporate interactive digital platforms. Where possible, we will use existing tanks.

Entry will begin by crossing a boardwalk over a watershed pond into the building that houses the three galleries and changing exhibit space. A theater, which has been underutilized, will be modified to better accommodate temporary exhibits, and improve life support systems. Temporary exhibits change every other year, and entice return visitation.

Sandy Shores Gallery - The shoreline is how most humans connect with the Oregon coastline. The Aquarium seeks to recreate interactives that further explore where man meets marine, and start the narrative about the Pacific Ocean that connects the three galleries. This first gallery provides an introduction to the complexity of this Oregon coastal ecosystem. The largest exhibit, which features a pier piling and the sea life that clings to it, will be refurbished with updated components, lighting and signage that better tells the human interaction story.

Twice a day at high tide, surging waves send cold seawater crashing onto Oregon's coastline to collect in tidepools forged out of the rocky cliffs. The centerpiece of the **Rocky Shores Gallery** is our interactive touch pool, featuring sea stars and anemones. We will extend the gallery to accommodate more exhibit space, including an expanded and more accessible touch pool for hands-on experiences.



The **Coastal Waters Gallery** will receive the most extensive remodeling. This gallery will see the greatest transformation, themed on the Pan Pacific. It will highlight marine species from several regions of the Pacific Ocean. Interpretation will include conservation issues such as the impact of climate change, plastic pollution and the warming, rising ocean. In addition to new static signage, digital monitors can articulate characteristics of the species, as well as current issues, research or related topics. Content can be updated periodically, and refer to additional information posted on Oceanscape.aquarium.org – our distance-learning network. Exhibits in this gallery will feature North American lobsters, eels and California kelp; giant Japanese crab; an Indo-Pacific coral reef; a cylindrical carousel of sea horses from Central America and interpretives on Oregon's place in the Pacific. A former kelp exhibit will be transformed into a warm water Pacific Rim exhibit featuring Unicorn and other Tangs, Large Angels, colorful Wrasse, squirrel fish and butterfly fish.

A former corridor of temporary exhibit space will be converted into a galleria of kreisel tanks illuminating sea nettles and graceful jellies.

At the exit point, a new vestibule will cover a walkway adjacent to rest rooms. Wayfinding signage will direct visitors to the aviary and marine mammal exhibits.





ENHANCED, SUSTAINABLE PROGRAMMING:

The Aquarium strives to create memorable experiences for learners of all ages and abilities. Multi-sensory curriculum, facilitated by the Aquarium's educators, aligns with state and national education standards, as well as national ocean literacy principles. Educational standards and methods have evolved significantly over 25 years. Thus the Aquarium must evolve to ensure it engages students with differing learning abilities deeply, imaginatively and meaningfully. In the fall of 2017, the Aquarium Education department conducted workshops with environmental education consultants, and met with local school districts, STEM Hub and other collaborators. The Aquarium concluded from these workshops how they might prioritize, modify and/or add to current educational programs. The education programs include:

Aquatots Early Education: The Aquarium offers a free, monthly on-site *Aquatots* program designed for preschool children ages 3-5 and their families to connect them with nature. Using the NaturePlay model, Aquarium staff engages children and their families on a voyage of discovery. Multi-sensory, age-appropriate, interactive, educational stations are facilitated by the Aquarium's certified educators to explore the wonders of the sea. Parents rotate with their child(ren) through these self-directed stations, and learn ways to teach skills in observing, listening, discerning and exploring. The Aquarium would like to offer Aquatots more often, and take this program to local daycare centers and preschools.

On-Site Education Program: The Oregon Coast Aquarium serves as a living classroom for young people. Aquarium educators are available for school field trips, supervise and teach children in overnight stays, and teach 100 lab programs to more than 2000 visiting students each year. Students taking aquarium science courses at Oregon Coast Community College, interns, and other science researchers work with Aquarium educators and husbandry staff to learn more about various marine species and oceanic environments.

School Outreach Program: Outreach education programs take the Aquarium on the road to rural elementary schools and home-school communities where distance and limited budgets preclude field trips. The Aquarium has expanded this outreach to remote schools in eastern Idaho, southern Washington and northern California as well as throughout Oregon.

Volunteer Programs: A legion of 380 volunteer interpreters, divers, educators and animal care providers serve more than 43,000 hours to keep the Aquarium open 364 days a year. Interpreters make

ocean literacy fun, and lower the cost of operations to make the Aquarium accessible to lower-income families. Certified divers enjoy the pristine waters, and help care for exhibit animals. Partnering with various agencies, youth volunteers participate in education and conservation projects.

Oceanscape Network Distance Learning:

Oceanscape Network is a web-based distance-learning program designed to connect preteens, teens and homeschooled students to science, nature and outdoor experiences using technology as the catalyst. More than 64,000 students and teachers explore oceanscape.aquarium.org to navigate the Oregon coast’s major landmarks, submit sightings of wild animals, or use GPS for high-tech exploration of nature areas. Oceanscape hosts a plethora of resources including live-stream videos tracking the rehabilitation and release of wildlife, links to topic-

specific content and blogs (such as climate change), virtual field exploration, grade-specific curriculum, suggested activities and ocean literacy guides for educators. *Oceanscape Network* features a video news magazine, *Oceanscape Explorer*, produced and hosted by our teen correspondents. These downloadable videos tackle exploration and conservation topics in greater detail, and aim to increase the number of online student and teacher users. As technologies change, the Aquarium continues to evaluate this program’s reach and effectiveness to remain progressive and bridge the digital divide.



Coastal Learning Symposium is a professional development program organized by the Aquarium for K-12 educators. It provides content, activities, resources and shared best-practices in STEM and interdisciplinary instruction on ocean literacy that help teachers engage students in learning about marine life and the environment. Localizing the subject of science piques students’ interest. A goal for the Symposium is to provide toolkits that aid teachers in designing activities and making science curriculum more relevant to students. These practical tools foster a more ocean-literate world in which we are all dependent. The ocean covers more than 70% of the Earth’s surface, and 97% of the planet’s water. Understanding the ocean’s profound impact ocean has on weather, eco-systems, food, and the economy is vital to our future.



MARINE WILDLIFE REHABILITATION/EDUCATION CENTER

Service Provided: The Oregon Coast Aquarium plays an active role in conservation and wildlife rehabilitation efforts. It is recognized as an authority and a trusted resource for the health of sea turtles, seals, sea lions, otters, birds, fish and invertebrates. The Aquarium is one of three wildlife rehabilitation facilities in the Pacific Northwest, and the only one in Oregon authorized by the U.S. Fish and Wildlife Service to provide specialized care to endangered marine life like sea turtles and sea birds.

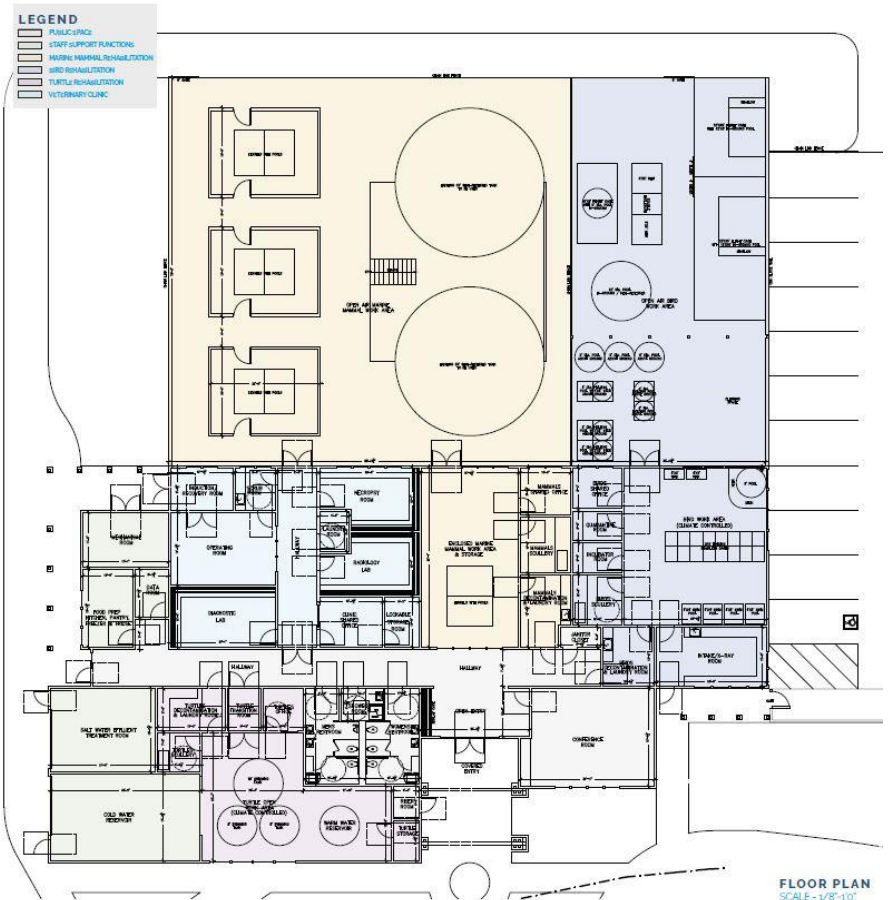
Project Description: Currently, the Aquarium utilizes aging warehouse facilities to diagnose and treat marine life, and contracts with veterinarians. Facility limitations make it difficult to quarantine injured or ill animals to safeguard the Aquarium's current marine population against disease, and minimize the impact of human contact. Moving a wild animal imposes further stress, and anesthetizing them puts it at undue health risk.



To accommodate increased marine life rescue, improve conditions for rehabilitation, and create an opportunity for learning, the Aquarium plans to build a state-of-the-art Marine Wildlife Rehabilitation Center for animal husbandry and veterinary staff to provide critical care to injured or stranded marine animals as well as our own collection. The facility will include indoor and outdoor enclosures, clinical facilities for veterinary diagnostics, observation and treatment. It will also serve as a teaching facility, enabling age-appropriate visitors a clinical view of this vital work in species survival.

We are currently consulting with industry professionals in veterinary medicine and education to develop plans for the Marine Wildlife Rehabilitation Center. Further, it will be designed with expansive day-lighting and energy efficiency, and seek the highest LEED-rating possible

Educational Programming: Studies show engaging students of all ages in real-life applications of science improves their knowledge and skills. In the case of high school students who are considering career paths, such experiences often inspire them to pursue higher education and careers in science fields in a way school curriculum does not. Studying or volunteering at the Marine Wildlife Rehabilitation/Education Center alongside researchers and animal husbandry staff expands their awareness of career and college tracks in medical and other science fields. Historically, the incorporation of education in the Aquarium's efforts to rehabilitate and return animals to their natural habitat has proven to be a most effective tool in raising awareness of current environmental issues affecting these animals, and humans every day.



Veterinary students rarely have an opportunity to observe, diagnose or treat marine animals. We plan to expand our partnerships with colleges and universities to create greater immersion opportunities for interns and veterinary students that will aid in their medical training requirements.

With the addition of the Marine Wildlife Rehabilitation/Education Center, the Aquarium's education programming for varied grade levels, particularly higher education, will: 1) teach the best way to procure, diagnose and treat marine animals at this facility; 2) provide a venue for research and discovery of ways to save animals from future population decline, pain and suffering; and 3) plants seeds of inquiry among thousands of students of all ages which will germinate into effective treatment of our environment and the species that rely on it for survival.

Partner Organization: Partnering with institutions of higher learning, wildlife organizations and local veterinarians, the Aquarium not only aids the animals, it provides practical research opportunities and in-field learning experiences for graduate students and interns interested in environmental impact, animal care and wildlife rehabilitation. Our current partners include: Lincoln County School District, Oregon State University, Oregon Coast Community College, NOAA National Marine Fisheries, International Veterinary Association, local veterinary hospitals, and Oregon Fish and Wildlife.

TIMELINE

Strategic Planning Phase

2015-16 - Embark on a strategic planning and conduct a feasibility study of focus groups and private interviews. Prioritize specific capital and programmatic needs, as well as the willingness to accept a proposal to fund those projects. The Aquarium Board of Directors accepts the strategic plan, and initiates a Capital Campaign Steering Committee.

2017 – Develop a Masterplan of capital projects and improvement by conducting concept workshops and developing drawings and landscape plans. Upon Board approval, launch an five-year campaign and begin lead-gift phase to raise at least \$2Million in the first year. Develop detailed strategic plan for educational programming.



Phase I

2018 – The Campaign will continue the lead-gift phase. Masterplan concept drawings will be refined in fall, construction cost estimates obtained. Depending on donor designations, the Aquarium will begin landscape site work at the entrance, and survey property in the winter.

2019 - The Aquarium will prioritize the Entryway and Children’s NaturePlay Area: permits will be submitted as funds accrue, complete architectural drawings will be completed and RFPs sent, project manager and contractor secured, and begin construction in the fall 2019.

2020 - Entryway and NaturePlay Area construction will continue toward completion.

Phase II

2019 – Concept drawings for the galleries will be completed. Modifications will begin on the galleries with a new *SeaPunk* temporary exhibit installation replacing two other temporary exhibits. The Aquarium will seek a State-funded appropriation from the 2019 Legislative Session for the campaign. Upon receiving commitments totaling 66% of campaign goal, the campaign will conduct a public launch in the Fall.

2020 - The Aquarium will continue to pursue grants from private foundations and corporations who have indicated their willingness to accept proposals once 40-50% of campaign is secured.

2021 – Gallery remodeling will begin as funds are secured. The Aquarium will expand public and private fundraising activities.

Phase III

2021-2022 – Once funding is secured, architectural drawings will be completed, permits obtained and site work will begin for the new Marine Wildlife Rehabilitation Center.

PROJECT SUPPORT BEYOND GRANT PERIOD: The Aquarium is paying down a 2005 Series A Revenue bond loan agreement, which requires the Aquarium to maintain certain cash reserve requirements, and minimum monthly transfers to the bond fund balance of approximately \$8.75 Million. Further, the covenants of that bond stipulate that any undesignated cash over \$1 Million at the end of the fiscal year must go toward paying down the bond. Our fiscal year ends Sept. 30 – at the conclusion of the higher revenue season – so we rely heavily on grant funding to carry us through the school year.

While the Aquarium conducts its five-year \$18.2 Million capital campaign, expenses related to the campaign (strategic planning consultants, concept drawings, fundraising), are funded with undesignated revenue that would normally fund programs. Strategic planning for programs, education consultants, evaluators, staff training and program expansion are necessary to grow or improve, and are funded through the program budget with undesignated revenue – the very operating revenue we need to run the education programs (especially in the off season). For foundations that do not fund capital projects, we are asking that grants be designated, and therefore carry over year-to-year during the campaign. Further, we are seeking capital project grants from foundations that would normally fund programs. The Phase I and II capital projects outlined in this proposal are expected to increase admissions, event rental and café revenue, but not result in increased operating costs except where offset by earned revenue. Operating expenses for Phase III will increase operating costs, but also afford an opportunity for new income streams from special tours, veterinary practicum fees, and grants.

TOTAL PROJECT BUDGET: \$18,200,000

- a. Confirmed Gifts/pledges: \$6,000,250**
- b. Proposals Pending: \$1,485,000**

MAJOR GIFTS/PLEDGES TO DATE: The following are major donors (\$10,000+) for whom we have confirmed gifts and pledges that are designated for programmatic and capital projects:

Anonymous (7)	Kaliher, Larkin & Fran Schlieski	Schlesinger Family Foundation
Autzen Foundation	Kinsman Foundation	Shafer, Julie & David
Cameron Foundation	Kuebbing, Kathy & Thomas	Siletz Tribal Charitable Fund
Clark Foundation	Lincoln Co. Comm. & Econ.	So Hum Foundation
Denham, Brent & Leslie	Dev.	Starker Forests Inc.
Dennis, Nancy & John	Local Ocean Seafoods	Starker, Barte & Pat
Doerfler Family Trust	Magmer, Jeanne	Starker, Bond & Marilyn
Flanigan Family Fdn., Shauna M. & Kevin B.	Maybelle Clark Macdonald Fund	Sunderland Foundation
Ford Family Foundation	Miller Family Fnd., Robert & Sharon	Swigert (ESCO) Foundation
Gray Family Foundation	Miller Fnd., James & Marion	Swindells Trust, Ann and Bill
Georgia-Pacific	Miller, Barry & Melissa	Thrasher, Ken & Marta
Gleason, Al & Janet	MJ Murdock Charitable Trust	Trust Management Services, LLC
Grimstad, Signe & Steve Driver	Oregon Coast Bank	Tucker Charitable Trust, Rose E.
Hickey Fnd., Ray	Oregon Community Fnd.	US Bank
Hillman Fnd., Henry Lea Jr.	Oregon Ocean Conservation	Vernier, Christine & David
Hillman Fnd., Summer Lea	Fund	Welch Estate, Patricia
Jackson Foundation	Reser Family Foundation	Wheeler Foundation
Jones Estate, Jerry	Riphey Fnd., James & Shirley	Young Trust, Juan

PROJECT BUDGET DETAIL: Cost estimations (not bids) for capital projects were provided by Oppenheim Lewis.

Oregon Coast Aquarium Masterplan Improvement Projects	PHASE 1 2016-2019	PHASE 2 2020-2021	PHASE 3 2021-2022	Future Projects	GRAND TOTAL
Entryway/Grand Hall Project Budget					
Entrance signage, landscape editing	\$ 349,800				
Entryway Grand Hall & Café remodeling	\$ 940,000				
Café remodel	\$ 520,000				
Ticketing annex		\$ 1,050,000			
Pathway re-landscape, estuary viewing deck, pond	\$ 135,000				
Outdoor Seating	\$ 40,365				
Lobby Live Animal Exhibit	\$ 478,000				
Wayfinding and site graphics	\$ 191,000				
Headwaters exhibit				\$ 200,000	
ENTRYWAY TOTAL	\$ 2,654,165	\$ 1,050,000	\$ -	\$ 200,000	\$ 3,904,165
Children's NaturePlay Project Budget					
Children's nature play space	\$ 700,000				
Outdoor amphitheater	\$ -	\$ 640,000			
Interpretive Plan	\$ 75,000				
Spruce tree deck & estuary observation decks	\$ 570,000				
New Program animal holding				\$ 250,000	
NATUREPLAY TOTAL	\$ 1,345,000	\$ 640,000	\$ -	\$ 250,000	\$ 2,235,000
Three Gallery Improvement Budget					
Changing Exhibit Rework	\$ 100,000				
Bridge and Boardwalk Entry to Gallery		\$ 312,000			
Gallery expansion, interior and exit reconstruction		\$ 1,723,000			
Pacific Rim Exhibit		\$ 350,000			
New gallery exhibits, expanded touch pool		\$ 563,000			
New interpretive signage		\$ 265,000			
THREE GALLERY TOTAL	\$ 100,000	\$ 3,213,000			\$ 3,313,000
Sustainable Program Enhancement					
Education & programming (\$500,000/year)	\$ 1,500,000	\$ 500,000	\$ 500,000	\$ 500,000	
New program and curriculum development, materials	\$ 53,000				
PROGRAMMING TOTAL	\$ 1,553,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 3,053,000
Marine Wildlife Rehabilitation/Education Center					
Architect & Design		\$ 420,000			
Construction			\$ 4,250,000		
Contingency (10%)			\$ 425,000		
Permits and Fees			\$ 40,000		
Medical Equipment				\$ 350,000	
Furnishings				\$ 175,000	
Marine Wildlife Rehab Center program development				\$ 75,000	
MARINE CENTER TOTAL	\$ -	\$ 420,000	\$ 4,715,000	\$ 525,000	\$ 5,660,000
	\$ 5,652,165	\$ 5,823,000	\$ 5,215,000	\$ 1,475,000	\$ 18,165,165
	TOTAL PHASE I	TOTAL PHASE 2	TOTAL PHASE 3	TOTAL PHASE 4	GRAND TOTAL

OREGON COAST AQUARIUM BOARD OF DIRECTORS – 2019

Executive Committee

Joe Postlewait, Chair, SVP Credit Admin & IO, Oregon Coast Bank - Newport, OR
Charlotte Boxer, Secretary, Owner, The Deep End Café - Portland, OR
W. Brent Denham, Second Vice Chair/, Project Manager, PacifiCorp- Vancouver, WA
Jay B. Fineman, At-Large, Veterinarian (Retired) - Newport, OR
Signe Grimstad, First Vice Chair/Treasurer, CPA, Grimstad & Associates - Newport, OR
David Shafer, Retired Principal, Ernst & Young – Gleneden Beach, OR
Carrie E. Lewis, Ex-Officio, President/CEO, Oregon Coast Aquarium
Rick Goulette, Ex-Officio, Chief Financial Officer, Oregon Coast Aquarium

Members

Laura Anderson, Owner, Local Ocean Seafoods - Newport, OR
Dustin Capri, AIA, Capri Architecture – Newport, OR
Dr. Robert K. Cowen, Director, OSU Hatfield Marine Science Center – Newport, OR
Kristen G. Hilton, Attorney, Sussman Shank LLP – Portland, OR
Barry Miller, President, Bales & Lamb’s Marketplace/VP Perishables, Signature NW – Portland, OR
Dr. Birgitte Ryslinge, Ph.D., President, Oregon Coast Community College – Newport, OR
Brand Schlesinger, Schlesinger Companies – Portland, OR
Peter A. Tuana, Retired Superintendent of Schools, Philomath School District

Advisory Council

Mark Collson, Retired, Western States Insurance
Al Gleason, Retired CEO, Pacificorp
Douglas Hunt, Commissioner, Lincoln County
Larkin Kaliher, Barney & Larkin Construction (Retired) - Portland, OR
Spencer R. Nebel, City Manager, City of Newport
Barry Schlesinger, Partner, Schlesinger Companies – Portland, OR
Bob Wienert, Owner, Road & Driveway Company

Board Emeritus

Dave Bosworth, Retired Owner, Euro-Pacific International Corp.
Don Davis, Retired City Manager, City of Newport
Gerry Frank, President, Gerry’s Frankly Speaking
Willoughby Greenwood, The Ferry Cabin
Milo Ormseth, Retired Partner, Stoel Rives LLP
Ken Thrasher, Chairman, Compli
Darlene Hooley, Honorary Board Member

District
Director

Person to Contact:

Barbara S. Cowans
Telephone Number:

FEB 7 1994

(213) 894-2336
Refer Reply to:

OREGON COAST AQUARIUM

EO (1208) 93
Date:

Oregon Coast Aquarium
2820 SE Ferry Slip Rd.
Newport, OR 97365-5259

JAN 21 1994

RE: Oregon Coast Aquarium
EIN: 93-0877807

Gentlemen:

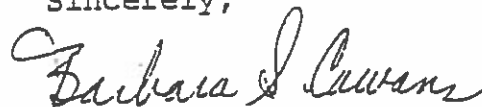
This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate that this organization was recognized to be exempt from Federal Income Tax in May 1985 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in May 1985 continues to be in effect.

If you need further assistance, please contact our office at the above address or telephone number.

Sincerely,



BARBARA S. COWANS
Disclosure Assistant

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
OREGON COAST AQUARIUM

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC C Corporation S Corporation Partnership Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
2820 SE FERRY SLIP RD

6 City, state, and ZIP code
NEWPORT OREGON 97365

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type.
See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
or									
Employer identification number									
9	3	-	0	8	7	7	8	0	7

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

- Under penalties of perjury, I certify that:
- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
 - I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
 - I am a U.S. citizen or other U.S. person (defined below); and
 - The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ <u>7-25-18</u>
------------------	----------------------------	-----------------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

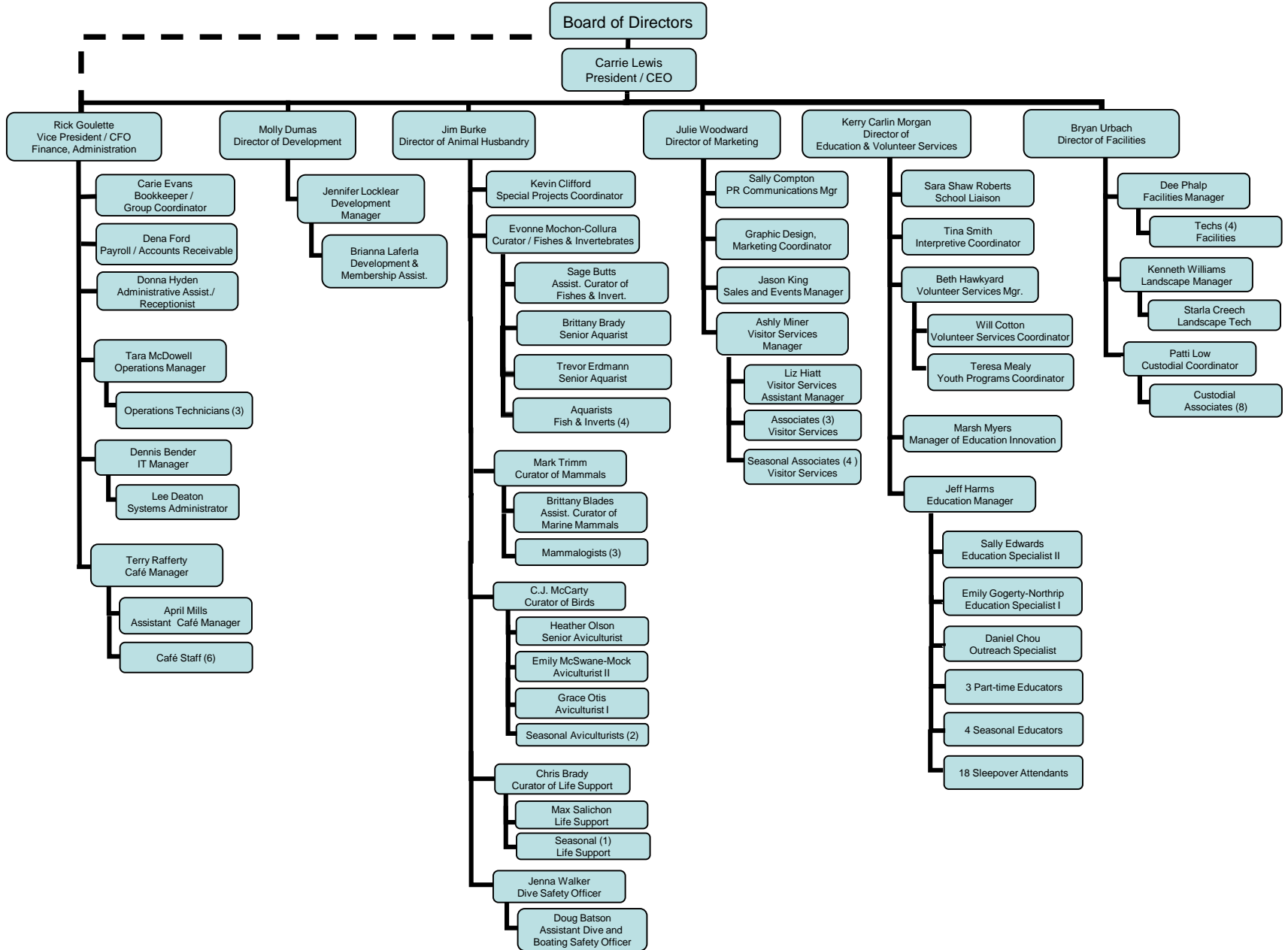
Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

Oregon Coast Aquarium Organization Chart January 2019





**OREGON COAST
AQUARIUM**
2018/2019 Annual budget

Support and revenue:

Admission Receipts	\$6,777,230
Memberships	766,150
Donations & grants	500,000
County Room Tax	219,100
Interest Income	2,700
Rental Income	1,053,660
Food Service	586,700
All Other Revenue	146,635
Total support and revenue	<u>10,052,175</u>

Expenses:

Cost of sales	149,000
Wages & Salaries	3,476,197
Payroll taxes	321,219
Employee benefits	739,283
Advertising & Promotion	666,110
Interest	498,480
Supplies	702,095
Leasehold expense	12,432
Rent	15,940
Travel	94,165
Communications	25,800
Maintenance and Repairs	253,190
Insurance	139,387
Depreciation	1,044,000
Services Purchased	732,129
Utilities	460,610
Postage and Shipping	24,480
Staff Education and Prof Develop	46,430
Bank Fees	191,400
Taxes	12,800
Other	80
Total Expenses	<u>9,605,227</u>

Net Income (Loss)

446,948

Oregon Coast Aquarium. Four Year Pro Forma

FYE - Sept. 30	Current Year	2018/2019	2019/2020	2020/2021	2021/2022
Support and revenue:					
Admission Receipts (a)	\$6,463,150	\$6,561,790	\$7,062,000	\$7,062,000	\$7,062,000
Memberships	757,570	763,770	785,000	790,000	800,000
Donations & grants	500,000	500,000	500,000	500,000	500,000
County Room Tax	191,600	219,100	220,000	220,000	220,000
Interest Income	1,410	2,620	2,650	2,620	2,620
Rental Income	941,130	1,051,160	1,070,000	1,080,000	1,090,000
Food Service (b)	611,410	583,200	641,520	705,672	776,239
All Other Revenue	153,870	145,135	150,000	150,000	150,000
Total support and revenue	9,620,140	9,826,775	10,431,170	10,510,292	10,600,859
Expenses:					
Cost of sales (c)	149,000	149,000	147,550	162,305	178,535
Wages & Salaries (d)	3,337,073	3,442,861	3,546,147	3,652,531	3,762,107
Payroll taxes (d)	307,130	318,111	326,246	336,033	346,114
Employee benefits (d)	735,113	736,663	780,152	803,557	827,664
Advertising & Promotion	653,860	666,110	675,000	675,000	675,000
Interest	521,604	498,480	498,480	436,780	393,134
Supplies	654,545	701,205	736,265	773,079	811,732
Leasehold expense	12,432	12,432	12,432	12,432	12,432
Rent	15,940	15,940	15,940	15,940	15,940
Travel	77,135	94,505	95,000	95,000	95,000
Communications	25,800	25,800	26,000	26,000	26,000
Maintenance and Repairs	214,944	253,190	254,000	256,000	260,000
Insurance	128,400	128,400	128,500	128,500	129,000
Depreciation	1,068,000	1,044,000	1,050,000	1,055,000	1,060,000
Services Purchased	601,566	673,236	673,500	674,000	674,000
Utilities	446,535	460,610	461,000	462,000	465,000
Postage and Shipping	19,300	24,480	25,000	25,000	25,000
Staff Education and Prof Develop	32,740	45,430	46,000	46,000	46,000
Bank Fees	175,400	191,400	191,500	191,500	191,500
Taxes	12,800	12,800	13,000	13,200	13,500
Other	80	80	80	80	80
Total Expenses	9,189,397	9,494,733	9,701,791	9,839,936	10,007,738
Net Income (Loss)	430,743	332,042	729,379	670,356	593,121

(a) Increase in attendance revenue due to admission price increases.

(b) Increase in food service income due to café and lobby remodel and ability to hold larger after hour catered events.

(c) Cost of sales increase due to food service sales.

(d) There will be no significant increase in wages, taxes and benefits due to remodeling changes.



Mission: We create unique and engaging experiences that connect you to the Oregon Coast and inspire ocean conservation.

Vision: The Oregon Coast Aquarium is a captivating destination and a trusted resource for ocean education and conservation in the Pacific Northwest.

Values:
 Respect, Teamwork, Passion,
 Guest-Focused, Creativity,
 Quality, Continuous Evolution,
 Integrity, Sustainability

	Deliver Memorable Experiences	Create a Compelling Sense of Place	Be a Recognized Authority
Why?	Providing great guest experiences is a proven way to attract visitors, create repeat visitors, grow membership, and increase stay time--all important ways to add to the bottom line for both mission and revenue.	The Oregon coast is imbued with a strong sense of place and the Aquarium is perfectly situated and designed to capture it.	Becoming a recognized authority and a trusted resource for the health of the oceans is a bold but achievable vision for the Aquarium.
Strategic Areas of Focus	<ul style="list-style-type: none"> Enhance & Increase Guest Interactions Create Personalization of Experiences Refresh and add Exhibits & Interpretation Strengthen Connection to Outdoors Further Develop Programming 	<ul style="list-style-type: none"> Create Connections to Pond & Estuary Reimagine Amenities to Align with Mission Begin the Experience at the Entry Expand and Maintain a Diverse Collection Offer Programming to extend experience beyond the facility 	<ul style="list-style-type: none"> Share Our Stories of Caring & Conservation Develop Authority Brand around core Conservation Focus areas Demonstrate Animal Care Best Practices Nurture Partnerships with Community Serve a Resource Role on regional conservation issues
Early Actions	<p>Enhance the ‘first touch’ in and the ‘last touch’ out of the Aquarium</p> <p>Maximize use of new presentation stage</p>	<p>Develop and implement a strategy and plan to improve physical elements of entry and exit experience, e.g. estuary overlook, signage.</p> <p>Increase animal diversity, including program animals</p>	<p>Identify Key Conservation Focus Areas; define current strengths, e.g. <i>dive-based research; marine debris; marine reserves; ocean acidification</i></p>
Strategies	<ul style="list-style-type: none"> Increase accessibility for animal encounters Enhance behind-the-scene areas/experience Develop matrix for current and desired level and frequency of animal/guest interactions Evaluate and implement encounters Develop exhibit strategy – refresh and changing Improve exhibit signage and lighting Add off campus excursions Develop Concierge ‘experiences’ desk Create ‘<i>Tell Us Your Story</i>’ & ‘<i>Conservation Ask</i>’ 	<ul style="list-style-type: none"> Evaluate and implement green best practices for café and retail amenities to better align with mission <ul style="list-style-type: none"> Water fill stations Explore adding satellite food locations Add Nature Play as part of experience Test and implement technology solutions to enhance the guest experience 	<ul style="list-style-type: none"> Personalize animals in Aquarium’s collection Increase media presence highlighting animal stories Highlight staff stories Increase presentations to peers on conservation focus areas Highlight Aquarium’s work with rehab of birds, turtles, and marine mammals

We've set our sights on a bold vision and have focused on three strategic imperatives to attain this vision. We recognize that in order to take even the first step in this ambitious journey, we need to commit to pursuing excellence in four foundational areas without which we will falter.

	Animal Welfare	Financial Sustainability	Strong and Stable Organization	Brand
Strategic Areas of Focus	<p>We are committed to providing unparalleled excellence in care and the best quality of life for our animal collection.</p> <ul style="list-style-type: none"> • Improve facilities and infrastructure to further enhance animal care • Invest in professional training for animal care staff • Pursue innovative and best-in-class exhibit design, care, and practices 	<p>We will have a sustainable business model, energize our team for growth, and embrace the opportunities our future holds.</p> <ul style="list-style-type: none"> • Strengthen stability of core income streams through strategic attendance growth and pricing adjustments • Further diversify revenue sources through fundraising, partnerships, and added earned revenue 	<p>We commit to strengthen and develop our board and “right-sizing” our staff, always being mindful of the impact of change on our organizational infrastructure.</p> <ul style="list-style-type: none"> • Further develop the Board to achieve our vision • Strategically invest in staff and volunteers • Embrace technology solutions to support our business and our guests 	<p>We will develop our brand as both a destination and a recognized authority on the oceans with a better understanding of our audiences.</p> <ul style="list-style-type: none"> • Refresh our brand to reflect our new mission and vision • Use our stories to better communicate our mission and messages to guests, members, and the community • Develop greater reach and impact across the Pacific Northwest
Early Actions	<p>Create concept Master Plan for Industrial Holding Area</p> <p>Secure vehicle</p>	<p>Assess fundraising campaign and strategy tied to new plan</p>	<p>Create Board Development Plan & Implementation Strategy</p>	<p>Develop and implement new brand strategy and platform</p>
Strategies	<ul style="list-style-type: none"> • Increase enrichment opportunities • Increase diagnostic capabilities • Enhance diet and nutrition analysis • Identify opportunities for additional staff time for training and enrichment • Improve animal holding and quarantine • Improve rehab facility • Secure reliable animal transport 	<ul style="list-style-type: none"> • Conduct research to better understand markets • Explore partnerships to secure outside funding (ODFW) • Continue to grow attendance in shoulder seasons • Evaluate pricing change based on market data • Expand income from add-ons; outdoor experiences, animal encounters, and programs 	<ul style="list-style-type: none"> • Improve volunteer training; Infrastructure; and programs • Evaluate staffing to identify areas of need to support plan • Evaluate Internship opportunities • Identify opportunities to have greater field connections • Increase professional development and training • Upgrade office technology and provide tech training and support 	<ul style="list-style-type: none"> • Conduct market research to better understand market, motivation, and impacts. • Develop mechanisms to gain greater guest and member insights • Increase visibility through PR, partnerships, and signage • Increase member touch points • Confirm scope and reach of outreach efforts



Oregon Coast Aquarium

Financial Statements and Other Information
as of and for the Year Ended September 30, 2018
and Report of Independent Accountants

OREGON COAST AQUARIUM

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REPORT OF INDEPENDENT ACCOUNTANTS

*The Board of Directors
Oregon Coast Aquarium:*

We have audited the accompanying financial statements of Oregon Coast Aquarium, which comprise the statement of financial position as of September 30, 2018, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the organization's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the organization's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Oregon Coast Aquarium as of September 30, 2018, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States.

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The schedule of functional expenses on pages 22 and 23 is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from, and relates directly to, the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

Summarized Comparative Information

We have previously audited Oregon Coast Aquarium's 2017 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated December 5, 2017. In our opinion, the summarized comparative information presented herein as of and for the year ended September 30, 2017 is consistent, in all material respects, with the audited financial statements from which it has been derived.

A handwritten signature in black ink that reads "Cary, G. & CO. LLP". The signature is written in a cursive, flowing style.

December 11, 2018

OREGON COAST AQUARIUM

STATEMENT OF FINANCIAL POSITION

SEPTEMBER 30, 2018

(WITH COMPARATIVE AMOUNTS FOR 2017)

	2018	2017
Assets:		
Cash and cash equivalents	\$ 1,609,266	993,446
Contributions and grants receivable <i>(note 4)</i>	1,252,245	898,628
Accounts receivable	306,415	297,837
Prepaid expenses and other assets	243,134	92,788
Investments <i>(note 5)</i>	7,658	200,000
Beneficial interest in assets held by the Oregon Community Foundation <i>(note 6)</i>	50,000	—
Property held for sale	—	65,000
Funded reserves for which use is limited <i>(notes 7 and 11)</i>	1,446,213	1,359,726
Property held subject to life estate <i>(note 8)</i>	280,000	280,000
Leasehold interest in land <i>(note 9)</i>	841,616	854,053
Property and equipment, net <i>(notes 10 and 11)</i>	19,184,601	18,836,674
Total assets	\$ 25,221,148	23,878,152
Liabilities:		
Accounts payable and accrued expenses	143,624	155,221
Accrued payroll and related expenses	325,670	291,611
Interest payable <i>(note 11)</i>	249,227	260,803
Construction payable	25,526	—
Bonds payable <i>(note 11)</i>	9,417,205	9,912,205
Life estate beneficiary use obligation <i>(note 8)</i>	65,988	68,118
Total liabilities	10,227,240	10,687,958
Net assets:		
Unrestricted:		
Available for programs and general operations	634,193	665,645
Net investment in capital assets and funded reserves	11,213,609	10,284,195
Total unrestricted net assets	11,847,802	10,949,840
Temporarily restricted <i>(note 12)</i>	3,096,106	2,190,354
Permanently restricted <i>(note 12)</i>	50,000	50,000
Total net assets	14,993,908	13,190,194
Commitments and contingencies <i>(notes 7, 9, 15, 16, 17, and 19)</i>		
Total liabilities and net assets	\$ 25,221,148	23,878,152

See accompanying notes to financial statements.

OREGON COAST AQUARIUM

STATEMENT OF ACTIVITIES

YEAR ENDED SEPTEMBER 30, 2018
(WITH COMPARATIVE TOTALS FOR 2017)

	2018			Total	2017
	Unrestricted	Temporarily restricted	Permanently restricted		
Operating revenues, gains, and other support:					
Admissions	\$ 6,605,328	–	–	6,605,328	6,496,609
Contributions and grants	774,177	75,000	–	849,177	892,291
Membership dues	763,087	–	–	763,087	757,925
Gift store and other rental income	729,392	–	–	729,392	749,603
Café sales, net of direct cost of goods sold of \$161,922 in 2018 and \$159,865 in 2017	409,603	–	–	409,603	405,581
Facility and equipment rentals	287,683	–	–	287,683	223,525
Interest income	2,691	–	–	2,691	1,683
Change in value of beneficial interest in life estate	–	2,130	–	2,130	2,131
Other	76,775	–	–	76,775	123,005
Total operating revenues and gains	9,648,736	77,130	–	9,725,866	9,652,353
Net assets released from restrictions (<i>note 13</i>)	168,096	(168,096)	–	–	–
Total operating revenues, gains, and other support	9,816,832	(90,966)	–	9,725,866	9,652,353
Expenses (<i>note 14</i>):					
Program services:					
Marine life exhibitions and care	4,096,176	–	–	4,096,176	4,019,986
Visitor services and marketing	1,822,681	–	–	1,822,681	1,808,602
Education and outreach	1,053,249	–	–	1,053,249	1,130,218
Total program services	6,972,106	–	–	6,972,106	6,958,806

Continued

OREGON COAST AQUARIUM

STATEMENT OF ACTIVITIES, CONTINUED

YEAR ENDED SEPTEMBER 30, 2018
(WITH COMPARATIVE TOTALS FOR 2017)

	2018			Total	2017
	Unrestricted	Temporarily restricted	Permanently restricted		
Expenses, continued (note 14):					
Supporting services:					
Management and general	1,812,796	–	–	1,812,796	1,635,236
Development and membership services	466,851	–	–	466,851	406,339
Total supporting services	2,279,647	–	–	2,279,647	2,041,575
Total expenses	9,251,753	–	–	9,251,753	9,000,381
Increase (decrease) in net assets before non-operating activities	565,079 ^[A]	(90,966)	–	474,113	651,972
Non-operating activities:					
Capital contributions	218,190	1,111,411	–	1,329,601	1,097,705
Endowment gifts	–	–	–	–	50,000
Net assets released from restrictions for capital purposes (note 13)	114,693	(114,693)	–	–	–
Increase in net assets	897,962	905,752	–	1,803,714	1,799,677
Net assets at beginning of year	10,949,840	2,190,354	50,000	13,190,194	11,390,517
Net assets at end of year	\$ 11,847,802	3,096,106	50,000	14,993,908	13,190,194

See accompanying notes to financial statements.

^[A] Net operating results include \$1,012,679 in depreciation and amortization expense.

OREGON COAST AQUARIUM

STATEMENT OF CASH FLOWS

YEAR ENDED SEPTEMBER 30, 2018
(WITH COMPARATIVE TOTALS FOR 2017)

	2018	2017
Cash flows from operating activities:		
Cash received from admissions, rental income, and other sources	\$ 8,262,125	8,040,023
Cash received from contributors and grantors	774,061	645,554
Cash received from members	763,087	757,925
Cash received from interest	2,691	1,683
Cash paid to employees and suppliers	(7,878,409)	(7,390,704)
Cash paid for interest	(512,811)	(535,700)
Net cash provided by operating activities	1,410,744	1,518,781
Cash flows from investing activities:		
Capital expenditures	(1,257,643)	(1,253,233)
Purchase of investments	(7,658)	(200,000)
Cash transferred to the Oregon Community Foundation	(50,000)	-
Proceeds from sales of investments	200,000	-
Net additions to funded reserves	(86,487)	(94,248)
Net cash used in investing activities	(1,201,788)	(1,547,481)
Cash flows from financing activities:		
Payments of note and bond principal	(495,000)	(395,000)
Proceeds from contributions restricted for capital improvements	876,864	351,197
Proceeds from contributions for long-term investments	25,000	25,000
Net cash provided by (used in) financing activities	406,864	(18,803)
Net increase (decrease) in cash and cash equivalents	615,820	(47,503)
Cash and cash equivalents at beginning of year	993,446	1,040,949
Cash and cash equivalents at end of year	\$ 1,609,266	993,446

See accompanying notes to financial statements.

NOTES TO FINANCIAL STATEMENTS

YEAR ENDED SEPTEMBER 30, 2018

1. Organization

The Oregon Coast Aquarium (the “Aquarium”) is a private, nonprofit aquatic and marine science educational facility offering a fun and interesting way to learn about Oregon’s unique coastal ecosystem. Since it opened its doors in 1992, the Aquarium has educated and entertained millions of visitors to the central Oregon coast, and has been a model for marine research and conservation.

The Aquarium’s mission is to maintain the highest quality aquatic and marine science programs for recreation and education so that the public better understands, cherishes, and conserves the world’s natural marine and coastal resources. The Aquarium is dedicated to teaching marine wildlife and ocean preservation through responsible management and exhibition of marine life. Objectives of the Aquarium are to develop and pursue conservation, develop and provide education and research programs of local and global significance, foster an awareness and appreciation of Oregon’s coastal environment and the interdependence of our global ecosystem, and serve as a community resource and recreational center.

As an accredited member of the Association of Zoos and Aquariums, the Aquarium is committed to providing excellent care for animals, a great experience for visitors, and a better future for all living things.

2. Program Services

During the year ended September 30, 2018, the Aquarium incurred program service expenses in the following major categories:

Marine Life Exhibitions and Care – The Aquarium maintains and cares for over 500 species of animals in stunning indoor and outdoor exhibits at its 30-acre marine facility. Some of the current

exhibits include Passages of the Deep, Big Bites, Seals & Sea Lions, Jellies, Sea Otters, Giant Pacific Octopus, Seabird Aviary, and others. The primary function of the animal husbandry department is to provide care and a healthy environment for the marine animals. The department is responsible for all aspects of animal husbandry, life support, rehabilitation, animal collection, transport, and all dive programs associated with the Aquarium.

Visitor Services and Marketing – The Aquarium provides information and related services to visitors, students, researchers, scholars, and others interested in the Aquarium’s exhibits, programs, and other activities. In addition, the Aquarium conducts broader efforts to communicate with the general public about marine life and Oregon’s coastal ecosystems, and promote the Aquarium’s educational programs and services.

Education and Outreach – The Aquarium is dedicated to helping students and teachers understand the wealth and fragility of Oregon’s coastal resources so that future generations will cherish and conserve them. All of the Aquarium’s educational programs and materials are designed to address Oregon’s school curricula, offering over 15 different theater and laboratory programs, from pre-kindergarten through grade 12. The Aquarium offers many teaching resources and outreach programs, including assembly programs featuring active learning tools, slides, costumes, animal bio-facts, and teacher workshops. Starting with the 2013 to 2014 school year, educational opportunities also included the exciting web-based program, the Oceanscape Network.

3. Summary of Significant Accounting Policies

The significant accounting policies followed by the Aquarium are described below to enhance the usefulness of the financial statements to the reader.

Basis of Accounting – The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with generally accepted accounting principles and the principles of fund accounting. Fund accounting is the procedure by which resources for various purposes are classified for accounting purposes in accordance with activities or objectives specified by donors.

Basis of Presentation – The Aquarium has adopted the provisions of Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) No. 958-605, *Revenue Recognition*, and FASB ASC No. 958-205, *Presentation of Financial Statements*. Under these provisions, net assets and all balances and transactions are presented based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the Aquarium and changes therein are classified and reported as follows:

- *Unrestricted net assets* – Net assets not subject to donor-imposed stipulations.
- *Temporarily restricted net assets* – Net assets subject to donor-imposed stipulations that will be met either by actions of the Aquarium and/or the passage of time. These balances represent the unexpended portion of externally restricted contributions to be used for specific programs and activities as directed by the donor.
- *Permanently restricted net assets* – Net assets subject to donor-imposed stipulations that they be maintained permanently by the Aquarium. Generally, the donors of these assets permit the Aquarium to use all or part of the income earned on related investments for general or specific purposes.

Expenses are reported as decreases in unrestricted net assets. Gains and losses on investments and other assets or liabilities are reported as increases or decreases in unrestricted net assets unless their use is restricted by explicit donor stipulation or by law. Expirations of temporary restrictions on net assets (i.e., the donor-stipulated purpose has been fulfilled and/or the stipulated time period has elapsed) are reported as net assets released from restrictions.

Use of Estimates – The preparation of financial statements in conformity with generally accepted accounting principles requires that management make estimates and assumptions that affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates. In the opinion of management, such differences, if any, would not be significant.

Investments – Investments consist of corporate stocks reported at fair value. Certificates of deposit with initial maturities of greater than three months are carried at cost. Net appreciation (decline) in the fair value of investments, which consists of the realized gains or losses and the unrealized appreciation (decline) of those investments, is shown in the statement of activities. Investment income is accrued as earned.

Capital Assets and Depreciation – Property and equipment are carried at cost when purchased and initially at fair value when acquired by gift. Depreciation is provided on a straight-line basis over the estimated useful lives of the respective assets, which is generally 40 to 48 years for buildings and related improvements, 27 to 40 years for permanent exhibits and related infrastructure, 5 to 20 years for furniture and equipment, 5 years for vehicles, and 2 years for temporary exhibits. Marine life specimens collected for exhibits are amortized over a five-year life. Maintenance and repair costs are expensed as incurred.

The Aquarium periodically reviews the carrying amount of its capital assets whenever events or circumstances provide evidence that suggests that the carrying amount may not be recoverable. As of September 30, 2018, the Aquarium does not believe there is any indication that the carrying value of its capital assets has been impaired during the year ended September 30, 2018.

Inventories – Inventories, which consist primarily of food for the café, are carried at the lower of cost or market value and are reported as “prepaid expenses and other assets” on the statement of financial position.

Contributions – Contributions, which include unconditional promises to give (pledges), are recognized as revenues in the period the donor’s commitment is received. Conditional promises to give are not recognized until they become unconditional, that is when the conditions on which they depend are substantially met. Contributions of assets other than cash are recorded at their estimated fair value.

Unconditional promises to give, with payments due to the Aquarium in future periods, are recorded as increases in temporarily restricted net assets at the estimated present value of future cash flows. In addition, when necessary, management also estimates an allowance for uncollectible contributions receivable based on past collection history.

Contributions of capital assets without donor stipulations concerning the use of such long-lived assets are reported as revenues of the unrestricted net asset class. Contributions of cash or other assets to be used to acquire land, buildings and equipment with such donor stipulations are reported as revenues of the temporarily restricted net asset class; the restrictions are considered to be released at the time of acquisition of such long-lived assets.

Restricted contributions received and expended in the same period are reported as unrestricted contributions.

In-Kind Contributions – A number of unpaid volunteers have made significant contributions of their time to develop and implement the Aquarium’s programs. In accordance with FASB ASC No. 958-605, *Revenue Recognition*, the value of such services, which the Aquarium considers generally not practicable to estimate, has not been recognized in the accompanying financial statements. Significant services received, which create or enhance a non-financial asset or require specialized skills that the Aquarium would have purchased, if not donated, are recognized in the statement of activities. During the year ended September 30, 2018, the Aquarium recorded \$149,236 of in-kind advertising.

In addition, the Aquarium benefited from approximately 43,348 hours donated by volunteers during the year ended September 30, 2018. These contributed services are not reported in the accompanying financial statements because they do not satisfy the standards set forth in FASB ASC No. 958-605.

Finally, in-kind contributions of equipment and other materials are recorded where there is an objective basis upon which to value these contributions, and where the contributions are an essential part of the Aquarium’s activities. No in-kind contributions of equipment or other materials were recorded during the year ended September 30, 2018.

Revenue Recognition – All contributions and grants are considered available for unrestricted use unless specifically restricted by the donor. Admissions and other service revenues are recognized at the time the services are provided and the revenues are earned. Rental revenues are recognized when earned in accordance with the terms of the respective leases. Membership payments received from Aquarium members are considered equivalent to unrestricted contributions and are recognized as revenue when received.

Beneficial Interest in Life Estate – The Aquarium may enter into life estate agreements with donors, whereby the Aquarium will receive gifts of a remainder interest in a property. In such agreements, the donor transfers irrevocable title to the Aquarium with a retained right to use of the property, either by the donor or a specified beneficiary for a specified term. At the conclusion of the term, all rights in the property are transferred to the Aquarium. The Aquarium initially records the related property held subject to a life estate at fair value and the life estate beneficiary use obligation based on estimated future cash receipts and the actuarial life expectancy of the beneficiary. The difference between the fair value of the property held for investment and the fair value of the use obligation for the donor's or the specified beneficiary's life interest is recognized as contribution revenue. Subsequent adjustments to the life estate beneficiary use obligation are reported as changes in the value of the beneficial interest in life estate.

Outstanding Legacies – The Aquarium is the beneficiary under various wills and trust agreements, the total realizable amounts of which are not presently determinable. The Aquarium's share of such bequests is recorded when the probate court has declared the testamentary instrument valid and the proceeds are measurable.

Benefits Provided to Donors at Special Events – The Aquarium conducts special fundraising events in which a portion of the gross proceeds paid by the participants represents payment for the direct costs of the benefits received. Unless a verifiable, objective means exists to demonstrate otherwise, the fair value of meals and entertainment provided at special events is measured at the actual cost to the Aquarium.

Concentrations of Credit Risk – The Aquarium's financial instruments consist primarily of cash equivalents, corporate stocks, and a beneficial interest in assets held by the Oregon Community Foundation ("OCF"), which may subject the organization to concentrations of credit risk as, from time to time, for example, cash balances may exceed amounts insured by the Federal Deposit Insurance Corporation ("FDIC").

All checking and savings accounts, money market deposit accounts, and certificates of deposit are insured by the FDIC for up to \$250,000 for each depositor and for each insured bank. At September 30, 2018, the Aquarium's cash accounts and funded reserves were \$2,608,422 in excess of FDIC insurance coverage.

The organization's beneficial interest in assets held by OCF (see note 6) is subject to changes in the fair values of the underlying assets owned by OCF (from which the value of the organization's beneficial interest has been derived), and also is dependent on the value of the assets being commensurate with the value of distributions expected to be made to the Aquarium by OCF in future years.

Certain receivables may also, from time to time, subject the organization to concentrations of credit risk. To minimize its exposure to significant losses from customer or donor insolvencies, the organization's management evaluates the financial condition of its customers and donors, and monitors concentrations of credit risk arising from similar geographic regions, activities, or economic characteristics. When necessary, receivables are reported net of an allowance for uncollectible accounts.

Advertising and Promotional Expenses – Advertising and promotional costs are charged to expense as they are incurred. For the year ended September 30, 2018, the Aquarium incurred \$709,784 in advertising and promotional costs (including \$149,236 of in-kind advertising and related services).

Endowment Funds and Interpretation of Relevant Law – Effective January 1, 2008, the State of Oregon adopted the Uniform Prudent Management of Institutional Funds Act ("UPMIFA"), which governs Oregon charitable institutions with respect to the management, investment, and expenditure of endowment funds.

The Board of Directors has interpreted Oregon's adoption of UPMIFA as requiring the organization to adopt investment and spending policies that preserve the fair value of the original gift as of the date of gift, absent explicit donor stipulations to the contrary. Although the organization has a long-term fiduciary duty to the donor (and to others) for a fund of perpetual duration, the preservation of the endowment's purchasing power is only one of several factors that are considered in managing and investing these funds.

Furthermore, in accordance with UPMIFA, a portion of the endowment's historic dollar value may be appropriated for expenditure in support of the restricted purposes of the endowment if this is consistent with a spending policy that otherwise satisfies the requisite standard of prudence under UPMIFA.

As a result of this interpretation, the organization classifies as permanently restricted net assets (1) the original value of gifts donated to the permanent endowment, (2) subsequent gifts to the endowment, and (3) accumulations made pursuant to the direction of the applicable donor gift instrument at the time the accumulation is added to the fund.

Net earnings (realized and unrealized) on the investment of endowment assets are classified as temporarily restricted until those amounts are appropriated for expenditure by the organization in a manner consistent with the standard of prudence prescribed by UPMIFA and until expended in a manner consistent with the purpose or time restrictions, if any, imposed by the donor. Any investment return classified as permanently restricted represents only those amounts required to be retained permanently as a result of explicit donor stipulations.

With regard to endowment losses or appropriations in excess of the fair value of the original gift, in accordance with FASB ASC No. 958-320, *Investments – Debt and Equity Securities*, the portion of a donor-restricted endowment that is classified as permanently restricted is not reduced by losses on the investments of the fund, except to the extent required by the donor, including losses related to specific investments that the donor requires the organization to hold in perpetuity. Similarly, the amount of permanently restricted net assets is not reduced by an organization's appropriations from the fund. In the absence of donor stipulations or law to the contrary, losses or appropriations of a donor-restricted endowment reduce temporarily restricted net assets to the extent that donor-imposed temporary restrictions on net appreciation of the fund have not been satisfied before the loss or appropriation occurs. Any remaining loss or appropriation reduces unrestricted net assets.

In accordance with UPMIFA, the Board of Directors has adopted investment and spending policies for endowment assets that attempt to provide a predictable stream of funding to the programs and operations supported by its endowment, while also seeking to maintain the long-term purchasing power of the endowment assets. Therefore, the Board of Directors considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- The duration and preservation of the donor-restricted endowment fund;
- The purposes of the organization and the donor-restricted endowment fund;
- General economic conditions;
- The possible effect of inflation and deflation;
- The expected total return from income and the appreciation of investments;
- Other resources of the organization; and
- The investment policies of the organization.

During the year ended September 30, 2018, the organization's Board of Directors made no appropriations of donor-restricted endowment assets for expenditure.

Measure of Operations – The Aquarium includes in its measure of operations all revenues and expenses that are integral to its program and supporting activities, including net assets released from donor restrictions to support operating expenditures. The measure of operations excludes contributions restricted for acquisition of capital assets, contributions of endowment funds, contributions of capital assets, and net assets released from restrictions for capital purposes.

Conflict-of-Interest Policies – Included among the Aquarium’s Board members, committee members, and executives are volunteers from the community who provide valuable assistance to the Aquarium in the development of policies, programs, and in the evaluation and oversight of services. The Aquarium has established a conflict-of-interest policy whereby Board and committee members and employees must advise the Board of Directors of any direct or indirect interest in any transaction or relationship with the Aquarium, and do not participate in discussions and decisions regarding any action affecting their individual, professional, or business interests.

Income Taxes – The Aquarium is exempt from federal and state income taxes under Section 501(c)(3) of the Internal Revenue Code and comparable state law, and derives its public charity status as an organization described in Sections 170(b)(1)(A)(vi) and 509(a)(1) of the Internal Revenue Code.

In addition, the Aquarium has adopted the recognition requirements for uncertain income tax positions as required by generally accepted accounting principles. Income tax benefits are recognized for income tax positions taken or expected to be taken in a tax return, only when it is determined that the income tax position will more-likely-than-not be sustained upon examination by taxing authorities. The Aquarium has analyzed the tax positions taken in its filings with the Internal Revenue Service and state jurisdictions where it operates, and believes that its income tax filing positions will be sustained upon examination and does not anticipate any adjustments that would result in a material adverse effect on the organization’s financial condition, results of operations or cash flows. Accordingly, the Aquarium has not recorded any reserves, or related accruals for interest and penalties for uncertain income tax positions at September 30, 2018.

Subsequent Events – As required by FASB ASC No. 855-10, *Subsequent Events*, subsequent events have been evaluated by management through December 11, 2018, which is the date the financial statements were available to be issued.

Summarized Financial Information for 2017 – The accompanying financial information as of and for the year ended September 30, 2017 is presented for comparative purposes only and is not intended to represent a complete financial statement presentation.

Other Significant Accounting Policies – Other significant accounting policies are set forth in the financial statements and the following notes.

4. Contributions and Grants Receivable

Contributions and grants receivable are summarized as follows at September 30, 2018:

<i>Unconditional promises expected to be collected in:</i>	
Less than one year	\$ 583,192
One year to five years	723,663
	<hr/> 1,306,855
Less discount ¹	(54,610)
	<hr/> \$ 1,252,245

¹ Unconditional promises to give due in more than one year are reflected at the present value of estimated future cash flows using a discount rate of 4.50%.

Contributions and grants receivable at September 30, 2018 are restricted for the following purposes:

Capital campaign	\$ 1,253,855
Unrestricted	50,000
Other purposes	3,000
	<hr/> \$ 1,306,855

5. Investments

Investments consist of corporate stocks totaling \$7,658 at September 30, 2018, carried at fair value. Investments at September 30, 2017 consist of certificates of deposit having initial maturities of greater than three months totaling \$200,000, reported at cost.

6. Beneficial Interest in Assets Held by the Oregon Community Foundation

The accompanying financial statements reflect a beneficial interest held by the organization in the assets of a donor-restricted endowment fund at OCF. In accordance with FASB ASC No. 958-605, Revenue Recognition, the organization accounts for its interest in these funds using the equity method of accounting, which approximates the present value of the estimated expected future cash flow that will inure to the organization. Management's estimate of fair value is based solely upon information provided by OCF.

Changes in the organization's beneficial interest in this fund for the year ended September 30, 2018 are summarized as follows:

Balance at beginning of year	\$	–
Contribution to the Oregon Community Foundation		50,000
Balance at end of year	\$	50,000

Under the terms of its agreement with OCF, OCF maintains variance power over, and legal ownership of, these funds. The funds are invested at the discretion of OCF's Board of Directors and are held in a mixture of asset classes designed to maximize return while minimizing risk. The valuations disclosed in the preceding table have been provided by OCF. OCF makes distributions of net investment return earned on these assets at least annually (generally 4.45% of the average fair market value of the funds using a trailing 13-quarter average). During the year ended September 30, 2018, no distribution was received by the organization. However, distributions can be made at any time by the affirmative vote of a majority of the organization's Board of Directors and the approval of OCF.

7. Funded Reserves for Which Use is Limited

Funded reserves represent assets held and invested by an independent trustee under the terms of a bond indenture agreement (see note 11). The bond indenture stipulates that the funds be used to pay principal and interest due on the bonds.

The bond fund is to be used to pay principal and interest when due and a designated amount is required to be deposited in the bond fund on the first business day of each month to meet loan payment requirements (also see note 11).

The reserve fund is used to pay principal and interest on the bonds if bond funds are insufficient to meet loan payment demands, and the Aquarium must maintain a minimum of \$600,000 in this fund. At its discretion, the trustee will utilize any funds held in excess of the minimum requirements for the purpose of early redemption of bond principal in the future.

The funds consist of the following at September 30, 2018:

Bond fund	\$	845,785
Reserve fund		600,428
		<hr/>
	\$	1,446,213

At September 30, 2018, these funds are held in money market deposit accounts.

Continued

The changes in the funded reserves for the year ended September 30, 2018 are summarized in the following table:

Funded reserves at beginning of year	\$ 1,359,726
<i>Additions:</i>	
Monthly deposits (annualized)	1,020,000
Additional deposits	71,607
Interest income	2,691
<i>Less:</i>	
Payment of interest expense	(512,811)
Payment of bond principal	(495,000)
<hr/>	
Funded reserves at end of year	<hr/> <u>\$ 1,446,213</u>

On November 2, 2018, the Aquarium utilized \$590,000 of the Bond Fund for early bond principal redemption.

8. Beneficial Interest in Life Estate

During the year ended September 30, 2012, the Aquarium entered into a life estate agreement with a donor whereby the Aquarium will receive a gift of remainder interest in a property. The donor transferred irrevocable title to the property to the Aquarium with a retained right to use of the property by a designated third-party beneficiary for a specified term. The beneficiary has certain rights to the property for the remainder of the beneficiary's life, as long as the beneficiary occupies and maintains the property. In the event of death, or if the beneficiary fails to maintain the property as required by the agreement, all rights in the property are transferred to the Aquarium.

At September 30, 2018, the Aquarium's beneficial interest in the life estate is summarized as follows:

Property held subject to life estate	\$ 280,000
Life estate beneficiary use obligation	(65,988)
<hr/>	
Beneficial interest in the value of the remainder life estate	<hr/> <u>\$ 214,012</u>

9. Leasehold Interest in Land

In 1988, the Aquarium entered into two lease agreements, one with the Port of Newport and the second with the Newport Urban Renewal Agency, whereby each entity contributed to the Aquarium the use of certain land for its facilities. Both lease agreements expire in June of 2086, after which they will revert to month-to-month leases. Both lease agreements provided for an initial one-time rental payment of \$1, and specified that the Aquarium is solely responsible for all taxes and any other fees associated with the properties.

At the time of the transaction, the Aquarium's interest in the properties and the related contribution from the Port of Newport and the Newport Urban Renewal Agency were recorded at the estimated fair value of the land (approximately \$1,230,000). This leasehold interest is carried on the statement of financial position and is amortized annually on a straight-line basis over the life of the lease. As of September 30, 2018, the unamortized balance of the Aquarium's leasehold interest in the properties is \$841,616.

10. Property and Equipment

A summary of property and equipment at September 30, 2018 is as follows:

Land	\$ 2,646,644
Buildings and related improvements	38,660,316
Equipment, vehicles, and marine-life specimens	7,256,337
Construction-in-progress	1,568,565
<hr/>	
	50,131,862
Less accumulated depreciation	(30,947,261)
<hr/>	
	<hr/> <u>\$ 19,184,601</u>

11. Bonds Payable

On June 1, 2005, the Aquarium's 1998 Series A Revenue Bonds with a par value of \$12,965,000 were exchanged for 2005 Series A Revenue Bonds with the same par value. The issue matures in October of 2031. Interest rates range from 4.3% to 5.6%, and interest accrues monthly with interest payments due on April 1 and October 1 of each year, beginning October 1, 2005. Principal on the bonds is payable annually each October 1, beginning October 1, 2014. The Aquarium makes early bond principal redemptions whenever excess funds held in the bond fund are available.

The 2005 Series A Revenue Bonds require minimum monthly transfers to the bond fund (see note 7) of \$78,820, with increases in subsequent years as stipulated in the loan agreement (\$85,000 during the year ended September 30, 2018). Amounts accumulated in the bond fund are to be used to pay scheduled principal and interest amounts as required by the loan agreement.

The 2005 Series A Revenue Bond loan agreement also requires the Aquarium to maintain certain cash reserve requirements. Accordingly, the bond is secured by the bond fund and the reserve fund (see note 7). Additionally, the Aquarium has granted a security interest to the trustee in certain real and tangible personal property, subject to permitted encumbrances.

The loan agreement also requires the Aquarium to meet certain financial and performance covenants, including maintaining an annual attendance of at least 365,000 persons and maintaining an annual debt service coverage ratio of not less than 1.10. The Aquarium was in compliance with these financial and performance loan covenants at September 30, 2018.

At September 30, 2018, bonds payable totaled \$9,417,205 and related interest payable totaled \$249,227. Interest expense for the year ended September 30, 2018 totaled \$501,094.

The bonds mature on the dates and in the principal installments set forth in accordance with the indenture agreement, in the following table:

<i>On October 1,</i>	
2019	\$ 527,205
2020	795,000
2021	835,000
2025	875,000
2026	930,000
2027 to 2031	5,455,000
	<hr/>
	\$ 9,417,205

On November 2, 2018, the Aquarium utilized \$590,000 of the Bond Fund for early bond principal redemption.

12. Restrictions and Limitations on Net Asset Balances

Temporarily Restricted Net Assets

Temporarily restricted net assets at September 30, 2018 represent contributions, grants, and other unexpended revenues restricted by donors and available for specific program services and future periods, as follows:

Capital campaign	\$ 1,847,618
Leasehold interest in land (<i>note 9</i>)	841,616
Beneficial interest in life estate (<i>note 8</i>)	214,012
Playground	105,000
Education and youth program	25,000
Other purposes	12,860
Future periods	50,000
	<hr/>
	\$ 3,096,106

Permanently Restricted for Endowment

At September 30, 2018, the organization held \$50,000 in a donor-restricted endowment fund. The investment income earned on this permanent endowment is unrestricted as to purpose.

13. Net Assets Released from Restrictions

During the year ended September 30, 2018, the Aquarium incurred costs in satisfaction of the restricted purposes specified by donors, or satisfied the restrictions by the occurrence of other events. Accordingly, a corresponding amount has been reported as a reclassification from temporarily restricted net assets to unrestricted net assets in the accompanying statement of activities. Total net assets released from restrictions are summarized as follows:

<i>Satisfaction of restrictions:</i>	
For operating purposes	\$ 168,096
For capital purposes	114,693
	<hr/>
	\$ 282,789

14. Expenses

The costs of providing the various programs and other activities of the Aquarium have been summarized on a functional basis in the statement of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

15. Retirement Plan

The Aquarium offers an independently administered, defined contribution retirement plan to its employees. Employees can participate in a tax-sheltered annuity plan, as described under Section 403(b) of the Internal Revenue Code. All employees may make voluntary contributions to the 403(b) plan on a pre-tax basis, up to the limits allowed by law, beginning on the first day of the month following their date of hire. After one year of employment, the Aquarium contributes a matching amount up to 4.0% of employees' compensation if they have contributed to the plan. For the year ended September 30, 2018, the Aquarium's contributions totaled \$71,134.

16. Operating Lease Commitments

The Aquarium leases certain office equipment under noncancelable operating lease agreements that expire in various years through 2023.

Future minimum rental payments required under operating leases that have terms in excess of one year at September 30, 2018 are as follows:

<i>Years ending September 30,</i>	
2019	\$ 18,340
2020	10,128
2021	4,262
2022	4,262
2023	4,262
	<hr/>
	\$ 41,254

Lease expense for the above leases totaled \$16,775 for the year ended September 30, 2018.

17. Other Commitments

The Aquarium entered into several agreements for security services, certain constructions services, and the lease of an exhibit. Outstanding commitments under these agreements at September 30, 2018 are summarized as follows:

Security	\$ 293,250
Constructions	264,231
Exhibit lease	180,000
	<hr/>
	\$ 737,481

Subsequent to September 30, 2018, the Aquarium entered into an agreement with an architecture company for services in connection with the capital campaign. Minimum future commitments under this agreement total \$814,795.

18. Related-Party Transactions

Related parties consist of the Aquarium's Board members and the companies controlled by the members. During the year ended September 30, 2018, the Aquarium entered into various transactions with companies controlled by Board members, mostly for banking and architectural services, costing \$28,265.

All Aquarium conflict-of-interest standards and practices were followed in these transactions. The Aquarium's Board of Directors unanimously approved the above transactions, with the Directors involved in the transactions abstaining from voting.

19. Line of Credit

The Aquarium maintains an unsecured line of credit with Oregon Coast Bank for up to \$800,000, which matures in December of 2019 and bears interest at 5.50% at September 30, 2018. There were no outstanding borrowings under this agreement at September 30, 2018.

20. Fair Value Measurements

Included in the accompanying financial statements are certain financial instruments carried at fair value. The fair value of an asset or a liability is the amount that would be received to sell an asset or paid to transfer a liability in a current transaction between willing parties, that is, other than in a forced or liquidation sale. Fair values are based on quoted market prices when available. When market prices are not available, fair value is generally estimated using discounted cash flow analyses, incorporating current market inputs for similar financial instruments with comparable terms and credit quality.

All financial assets and liabilities carried at fair value have been classified, for disclosure purposes, based on a hierarchy defined by FASB ASC No. 820, *Fair Value Measurements and Disclosures*. The hierarchy gives the highest ranking to fair values determined using unadjusted quoted prices in active markets for identical assets and liabilities and the lowest ranking to fair values determined using methodologies and models with unobservable inputs as follows:

- *Level 1* – Values are unadjusted quoted prices for identical assets and liabilities in active markets accessible at the measurement date.
- *Level 2* – Inputs include quoted prices for similar assets or liabilities in active markets, quoted prices from those willing to trade in markets that are not active, or other inputs that are observable or can be corroborated by market data for the term of the instrument.
- *Level 3* – Certain inputs are unobservable (supported by little or no market activity) and significant to the fair value measurement. Unobservable inputs reflect the organization's best estimate of what hypothetical market participants would use to determine a transaction price for the asset or liability at the reporting date.

At June 30, 2018, the following financial assets are measured at fair value on a recurring basis:

	Level 1	Level 3	Total
Corporate stocks	\$ 7,658	–	7,658
Beneficial interest in assets held by The Oregon Community Foundation ¹	–	50,000	50,000
Total financial assets, at fair value	\$ 7,658	50,000	57,658

¹ See note 6 for a summary of the beneficial interest in assets held by The Oregon Community Foundation and associated activity for the year ended June 30, 2018.

21. Reconciliation of Statement of Cash Flows

The following presents a reconciliation of the increase in net assets (as reported on the statement of activities) to net cash provided by operating activities (as reported on the statement of cash flows):

Increase in net assets	\$ 1,803,714
<hr/>	
<i>Adjustments to reconcile increase in net assets to net cash provided by operating activities:</i>	
Depreciation	1,000,242
Amortization of leasehold interest in land	12,437
Proceeds from contributions restricted for capital improvements	(876,864)
Proceeds from contributions restricted for long-term investments	(25,000)
Change in value of beneficial interest in life estate	(2,130)
<i>Net changes in:</i>	
Contributions and grants receivable	(353,617)
Accounts receivable	(8,578)
Prepaid expenses and other assets	(150,346)
Accounts payable and accrued expenses	(11,597)
Accrued payroll and related expenses	34,059
Interest payable	(11,576)
<hr/>	
Total adjustments	(392,970)
<hr/>	
Net cash provided by operating activities	\$ 1,410,744
<hr/>	

■

Supplementary Information

OREGON COAST AQUARIUM

SUPPLEMENTARY SCHEDULE OF FUNCTIONAL EXPENSES

YEAR ENDED SEPTEMBER 30, 2018
(WITH COMPARATIVE TOTALS FOR 2017)

	Program services			2018
	Marine life exhibitions and care	Visitor services and marketing	Education and outreach	Total
Salaries and wages	\$ 982,304	554,263	529,219	2,065,786
Employee benefits	150,126	71,287	59,906	281,319
Payroll taxes	88,316	56,749	46,811	191,876
Interest	325,802	20,049	40,099	385,950
Legal fees	—	—	—	—
Advertising and promotion	—	709,784	—	709,784
Supplies	396,863	64,853	22,602	484,318
Utilities	399,586	12,120	19,154	430,860
Insurance	87,969	5,413	10,827	104,209
Bank fees	—	190,483	—	190,483
Contractual services	178,779	40,781	43,395	262,955
Maintenance and repairs	150,053	5,424	—	155,477
Printing and graphics	—	21,932	—	21,932
Accounting fees	—	—	—	—
Telephone	16,164	995	1,989	19,148
Travel	14,587	12,114	24,981	51,682
Postage and shipping	—	482	231	713
Rent	—	—	—	—
Education, conferences, and meetings	4,846	—	4,434	9,280
Professional dues	3,253	1,722	155	5,130
Other	—	—	—	—
Total expenses before depreciation and amortization expense, and indirect cost allocations	2,798,648	1,768,451	803,803	5,370,902
Depreciation and amortization	651,127	14,452	169,889	835,468
Allocation of indirect costs	646,401	39,778	79,557	765,736
Total expenses	\$ 4,096,176	1,822,681	1,053,249	6,972,106

Supporting services				
Management and general	Development and membership services	Total	Total	2017
1,067,847	137,688	1,205,535	3,271,321	3,197,088
385,402	15,378	400,780	682,099	749,915
91,182	11,358	102,540	294,416	293,522
110,273	5,012	115,285	501,235	526,551
490	–	490	490	3,380
–	–	–	709,784	707,191
189,407	3,134	192,541	676,859	600,515
52,673	2,394	55,067	485,927	509,029
29,775	1,353	31,128	135,337	112,470
5,072	–	5,072	195,555	186,631
295,874	190,904	486,778	749,733	536,359
91,543	4,964	96,507	251,984	290,285
–	54,482	54,482	76,414	54,576
39,793	–	39,793	39,793	39,202
5,472	248	5,720	24,868	22,077
8,029	11,331	19,360	71,042	71,566
5,338	14,280	19,618	20,331	14,238
16,775	–	16,775	16,775	16,606
6,758	770	7,528	16,808	9,792
1,789	–	1,789	6,919	6,239
11,384	–	11,384	11,384	12,364
2,414,876	453,296	2,868,172	8,239,074	7,959,596
173,601	3,610	177,211	1,012,679	1,040,785
(775,681)	9,945	(765,736)	–	–
1,812,796	466,851	2,279,647	9,251,753	9,000,381

GOVERNING BOARD AND MANAGEMENT

Board of Directors

EXECUTIVE COMMITTEE

Joe Postlewait, *Chair*
Executive Vice President
Oregon Coast Bank

Signe Grimstad, C.P.A., *First Vice Chair & Treasurer*
Owner
Grimstad & Associates

W. Brent Denham, P.E., P.M.P., *Second Vice Chair*
Chief Operating Officer
JR Merit, Inc.

Charlotte Boxer, *Secretary*
Owner
The Deep End Café

Jay B. Fineman, *At-Large*
VMD, Veterinarian (retired)

Larkin Kaliher, *At-Large*
Barney & Larkin Construction, Inc. (retired)

David Shafer, *At-Large*
Principal
Ernst & Young, LLP (retired)

OTHER BOARD MEMBERS

Laura Anderson
Owner
Local Ocean Seafoods

Dustin Capri, A.I.A.
NCARB, LEED Accredited Professional,
Neighborhood Development
Principal Architect
Capri Architecture, LLC

Dr. Robert Cowen
Director & Professor
Hatfield Marine Science Center

Kristen Hilton
Attorney
Sussman Shank, LLP

Barry Miller
President,
Bales & Lamb's Marketplace and Signature NW

Dr. Birgitte Ryslinge
President
Oregon Coast Community College

Brand Schlesinger, LEED Accredited Professional
General Manager
5d Contractors, LLC

Management

Carrie Lewis
President & Chief Executive Officer

Rick Goulette
Chief Financial Officer

Jim Burke
Director of Animal Husbandry

Molly Dumas
Director of Development

Kerry Carlin-Morgan, Ph.D.
Director of Education

Lance Beck
Director of Marketing

OREGON COAST AQUARIUM

INQUIRIES AND OTHER INFORMATION

Administrative offices

OREGON COAST AQUARIUM
2820 S.E. Ferry Slip Road
Newport, Oregon 97365

(541) 867-3474
(541) 867-6846 Fax

Web

www.aquarium.org

STATE OF OREGON
PROCLAMATION
OFFICE OF THE GOVERNOR

- WHEREAS:** The Oregon Coast Aquarium opened 25 years ago, on May 23, 1992; and
- WHEREAS:** The Oregon Coast Aquarium has attracted 14 million visitors since opening; and
- WHEREAS:** The Oregon Coast Aquarium is consistently ranked nationally among the top ten aquariums; and
- WHEREAS:** The Oregon Coast Aquarium maintains over 250 species and 15,000 animals; and
- WHEREAS:** The Oregon Coast Aquarium is Oregon's only rehabilitation facility authorized by the U.S. Fish and Wildlife Service to provide specialized care to endangered marine life; and
- WHEREAS:** The Oregon Coast Aquarium Education Outreach Programs bring marine science and ocean literacy to more than 35,000 students and 800 teachers in more than 100 schools and 29 Oregon counties annually.

NOW,

THEREFORE: I, Kate Brown, Governor of the State of Oregon, hereby proclaim **May 23, 2017** to be

OREGON COAST AQUARIUM DAY

in Oregon and encourage all Oregonians to join in this observance.

IN WITNESS WHEREOF, I hereunto set my hand and cause the Great Seal of the State of Oregon to be affixed. Done at the Capitol in the City of Salem in the State of Oregon on this day, May 2, 2017.



Kate Brown
Kate Brown, Governor

Dennis Richardson
Dennis Richardson, Secretary of State



8403 Colesville Road, Suite 710
Silver Spring, MD 20910-3314
301-562-0777 tel 301-562-0888 fax
www.aza.org

February 19, 2019

Governor Kate Brown
160 State Capitol
900 Court Street
Salem, Oregon 97301

Dear Governor Brown:

As Executive Director of the Association of Zoos and Aquariums (AZA), a national organization that oversees 233 zoos and aquariums across the country, I'm pleased and proud to support the Oregon Coast Aquarium's thoughtful and exciting plans. As an accredited member of the AZA, the Oregon Coast Aquarium meets the highest possible standards in all aspects of animal care and management. The Aquarium is dedicated to the conservation of marine wildlife in the State of Oregon and to engaging the public in active conservation. The Aquarium also has a significant economic impact on the community drawing visitors from the entire Pacific Northwest and beyond.

The Oregon Coast Aquarium educational efforts are extraordinary. Each year the Aquarium reaches thousands of children through engaging and unique educational experiences. The planned Marine Wildlife Rehabilitation/Education Center will greatly expand the work of the Aquarium in wildlife rescue, care and rehabilitation, as well as expand the educational component of that vital work. The Oregon Coast Aquarium with its immersive exhibits and captivating programs provides the personal connection to marine life that inspires visitors of all ages to care for animals and for the oceans.

On behalf of the AZA, I respectfully request that you consider supporting the Oregon Coast Aquarium. This investment will provide countless learning experiences for the children of Oregon and ensure that this excellent community resource will continue to thrive and pursue its compelling conservation mission for many years to come.

Sincerely,

A handwritten signature in black ink that reads "Kristin L. Vehrs". The signature is written in a cursive, flowing style.

Kristin L. Vehrs
Executive Director

February 13, 2019

Governor Brown
160 State Capitol
900 Court Street
Salem, OR 97301

Dear Governor Brown,

Travel Oregon's vision is a better life for all Oregonians through, strong, sustainable local economies. This includes enhancing economies throughout the state by helping communities better leverage the state's \$11.8 billion tourism industry. It also means working together for improved and upgraded facilities that enhance the visitor experience while also enriching Oregonians' quality of life.

The Oregon Coast Aquarium is one of the highlights of the Oregon Coast. From sea otters to harbor seals to jelly fish to Tufted Puffins, many of us grew up learning about local fauna by exploring the aquarium with friends and family. As a key driver of the tourism industry, Travel Oregon strongly supports the Oregon Coast Aquarium and their recent capital campaign. Enhancing and improving the aquarium will result in long-term, sustainable benefits for visitors and locals alike.

The Oregon Coast Aquarium is not only a mainstay of the community, but it's also a pillar in the tourism economy as it attracts more than 400,000 visitors annually, with 35 percent traveling there from out of state. This visitation contributes greatly to the local tourism industry on the Central Oregon Coast, where visitors spend \$788 million, resulting in more than 8,900 folks directly employed in the industry.

Funding for the Oregon Coast Aquarium will generate sustainable economic benefits by strengthening the local tourism industry and will improve local livability. Please don't hesitate to contact me if I can be of further assistance.

Sincerely,



Todd Davidson
CEO, Travel Oregon

ECONOMIC DEVELOPMENT ALLIANCE OF LINCOLN COUNTY

Strengthening Lincoln County's economy. Attracting and supporting primary jobs.

June 7, 2018

To Whom It May Concern:

The Economic Development Alliance of Lincoln County is pleased to offer unconditional support for the Oregon Coast Aquarium. Our Alliance has been actively providing economic development services to the county for over twenty years, and has worked closely with the aquarium since its inception at approximately the same time. The aquarium represents a unique and very valuable cultural asset. Its growth and expansion in functionality over the years reflects this. It is now a destination in its own right as it continues to beautify its landscape, provide educational experiences, and provide animal rehabilitation.

We understand that periodic improvements are necessary to modernize and upgrade the physical plant of such a large institution. The Community and Economic Development fund of Lincoln County has granted funds to the aquarium over the years. We urge others to do the same under the current fundraising campaign for capital and program improvements. Local support is strong and the community is highly involved in the workings of the aquarium. From the loyalty of staff and the large numbers of volunteers in every age range, the love and affection for the aquarium is evident. It is used for community events of all kinds.

The aquarium honors its visitors by its desire for the best and most professionally polished experience for them. We hope you will agree and support the fundraising campaign now underway.

Sincerely,



Caroline Bauman
Executive Director



May 21, 2018

*Stimulating economic growth
in the greater
Yaquina Bay region*

The Yaquina Bay Economic Foundation (YBEF) is an all-volunteer 501(c)(6) corporation formed in 1981 to encourage and promote growth and economic development in the greater Yaquina Bay region. Numbering nearly 40, YBEF's Directors represent a dynamic cross section of public and private sector business and community leaders throughout the Newport and Toledo area.

YBEF was instrumental in the concept and development of the Aquarium over 25 years ago. As one of YBEF's premium projects, the Aquarium was developed and supported by YBEF to help revitalize the local economy, draw tourism, facilitate ocean research and education.

The Aquarium brings more the 400,000 people through its doors each year and is consistently ranked one of the top ten aquariums in the nation. The Aquarium works collaboratively with OSU Hatfield Marine Science Center, NOAA, Oregon Coast Community College, Oregon Museum of Science and Industry and many other key partners in marine science education. The Aquarium is an essential to Newport and surrounding communities in Lincoln County.

The members of YBEF strongly support the Aquarium's current fundraising campaign to enhance the current facility and programming so this legacy continues to thrive for the local community, the state of Oregon and beyond.

We strongly encourage foundations and philanthropists to support the Oregon Coast Aquarium's fundraising efforts and educational mission.

Sincerely,

Birgitte Ryslinge
President, Yaquina Bay Economic Foundation



GREATER NEWPORT CHAMBER OF COMMERCE
555 S.W. COAST HWY | NEWPORT OR. | 97365
541-265-8801

August 8, 2018

The Greater Newport Chamber of Commerce (GNCC) 501(c)(6) corporation was formed in 1938 to encourage and promote tourism, growth and economic development in the greater Newport region. Numbering nearly 600 members, GNCC's membership represents a dynamic cross section of public and private sector business and community leaders throughout the Central Coast area.

GNCC was a strong partner in the development of the Aquarium more than 25 years ago. That partnership continues exceptionally strong today as we work together to help strengthen our local economy, draw tourism, and facilitate ocean research and education.

The Aquarium brings more than 400,000 people through its doors each year and is consistently ranked one of the top ten aquariums in the nation. The Aquarium works collaboratively with OSU Hatfield Marine Science Center, NOAA, Oregon Coast Community College, Oregon Museum of Science and Industry and many other key partners in marine science education. The Aquarium is an essential asset to Newport and surrounding communities in Lincoln County.

The Chamber and its Board members of GNCC strongly support the Aquarium's current fundraising campaign to enhance the current facility and programming so this legacy continues to thrive for the local community, the state of Oregon, and beyond.

We strongly encourage your support of the Oregon Coast Aquarium's fundraising efforts and educational mission.

Sincerely,

Patti Ferry
Interim Director
Greater Newport Chamber of Commerce

NEWPORT

169 SW COAST HWY
NEWPORT, OREGON 97365

COAST GUARD CITY, USA



www.newportoregon.gov

MOMBETSU, JAPAN, SISTER CITY

March 13, 2019

TO WHOM IT MAY CONCERN:

On behalf of the City Council of the City of Newport, we are requesting your support for state funding to assist in the development and realization of the Oregon Coast Aquarium's Marine Wildlife Rehabilitation/Education Center. State funding will allow Oregon to play an important role in conservation and wildlife rehabilitation efforts critical to Oregon's coastal communities and their economies.


The Oregon Coast Aquarium is an internationally recognized authority, and trusted resource, for the health of sea turtles, seals, sea lions, otters, sea birds, fish, and marine invertebrates. It is the only facility in Oregon authorized, by the U.S. Fish and Wildlife Service, to provide specialized care to endangered marine life such as sea turtles and sea birds. And, it is one of only three wildlife rehabilitation facilities in the Pacific Northwest.

The Oregon Coast Aquarium is environmentally important to the state, particularly, the coast. It is a critical educational resource, and with state funding for the Marine Wildlife Rehabilitation/Education Center, it will provide additional opportunities for research and learning in cooperation with existing marine research organizations located in Newport. The Oregon Coast Aquarium is an economic driver on the Oregon coast, drawing more than 410,000 visitors annually, and supporting a large tourism industry that contributes an estimated \$100,000,000 annually to local businesses supporting hundreds of jobs. And, finally, the Oregon Coast Aquarium is fun! It is frequently ranked as one of the top ten aquariums in the United States.


The City of Newport supports the Oregon Coast Aquarium and its plans to construct a Marine Wildlife Rehabilitation/Education Center, and we urge your support of the Aquarium's request for state funding. This funding will be used to make a great organization and facility even greater.

Thank you for your thoughtful consideration.

Very truly yours,



Dean H. Sawyer, Mayor



Spencer R. Nebel, City Manager

EST.

1882



LINCOLN COUNTY SCHOOL DISTRICT

Dr. Karen Gray
Superintendent

District Office
PO Box 1110, Newport, OR 97365
T 541-265-9211 | F 541-574-0511

Teaching & Learning Center
1212 NE Fogarty Street, Newport, OR 97365
T 541-265-9211 | F 541-265-3059
www.lincoln.k12.or.us

Carrie Lewis
Chief Executive Officer
Oregon Coast Aquarium
2820 SE Ferry Slip Road
Newport, OR 97365

February 19, 2019

Dear Carrie,

The Lincoln County School District (LCSD) is pleased to write this letter of support for the Oregon Coast Aquarium. Our partnership with the Aquarium has transformed our district's STEM work for the past decade.

Collaborating with the Oregon Coast Aquarium directly resulted in two three-year Math/Science Partnership (MSP) Grants that linked LCSD teachers with scientific researchers and professionals to bring place-based projects into their classrooms. In an effort to continue the work started with the MSP, the Aquarium, along with LCSD and Oregon Sea grant, played a key role in the formation of the Oregon Coast STEM Hub.

Oregon Coast Aquarium continues to support LCSD with implementing place-based education. Currently, the Aquarium is facilitating the process for one of our elementary schools to become a Stewardship School, which aims to engage students using natural resources as a context for learning. Additionally, we are developing the Coast Connections Program, a place-based, environmental education framework for K-6 educators. Place-based education has been shown to improve long-term, academic success in diverse populations by increasing engagement and connectedness to local communities. The program will not only benefit students, but by bringing together a variety of stakeholders in the region, this program aims to build an identity of pride and stewardship for our coastal community.

The Aquarium also hosts numerous teacher and student development programs that impact our district. For example, the Aquarium sponsors and trains a student team for the annual Salmon Bowl, provides student internships each summer, and runs marine professional development opportunities for teachers.

In short, the partnership between LCSD and Oregon Coast Aquarium has resulted in a dramatic shift in STEM and place-based teaching in our school district. On behalf of the Lincoln County School District, I offer strong support of the Oregon Coast Aquarium and their request for state funding. Your work has impacted informal and formal education throughout the state, and nowhere is this more apparent than in Lincoln County School District.

Sincerely,

Dr. Karen Gray
LCSD Superintendent



State of Washington
DEPARTMENT OF FISH AND WILDLIFE

Mailing Address: P.O. Box 43200, Olympia, WA 98504-3200 • (360) 902-2200 • TDD (360) 902-2207
Main Office Location: Natural Resources Building, 1111 Washington Street SE, Olympia, WA

February 1, 2019

Dr. James Burke
Director of Animal Husbandry
Oregon Coast Aquarium
2820 SE Ferry Slip Rd
Newport, OR 97365

Dear Dr. Burke,

I am writing in support of the Oregon Coast Aquarium's proposed Marine Wildlife Rehabilitation and Education Center. I work for the Washington State Department of Fish and Wildlife, Habitat Program, Oil Spill Team and our team is responsible for response planning associated with wildlife injured by exposure to oil spills. Our current plans for responding to oiled sea otters involve working with all the great northwest zoo and aquariums to coordinate access to existing facilities and to their staff with expertise in handling sea otters. In addition to the Oregon Coast Aquarium, we also work with the Vancouver Aquarium, Seattle Aquarium, Point Defiance Zoo and Aquarium, and Oregon Zoo.

The financial responsibility of responding to oiled animals lies with the entity that spilled the oil and this would not be responsibility of your facility. That said, we believe that your facility could be of great assistance if there was a spill in Oregon or Washington. One of the main ways we think your facility might be able to assist in a spill response would be if we were to augment your facility at the time of a spill with equipment to wash and rehabilitate oiled animals. This would involve delivering specialized trailers and additional pools and cages for use in the response.

For over a decade, we have worked with the Oregon Coast Aquarium to develop a voluntary plan to utilize your existing back lot property for oiled sea otter response activities. These plans have been incorporated into the wildlife response section of Northwest Area Contingency Plan, a master document guiding oil spill response in the Pacific Northwest. (<https://www.rrt10nwac.com/nwacp/>). A facility like your proposed Marine Wildlife Rehabilitation and Education Center could greatly increase the speed with which we could begin to rehabilitate injured sea otters.

Sea otters are a highly charismatic marine mammal that are extraordinarily susceptible to injury and death from an oil spill. The public will be highly supportive of measures to help reduce the effects of an oil spill on these animals. Your proposed facility could be very useful in helping to house and rehabilitate sea otters and potentially other wildlife affected by an oil spill.

Thank you

Don Noviello



Oregon State
University

Department of Clinical Sciences
College of Veterinary Medicine
272 Magruder Hall, Corvallis, OR 97331
P 541-737-4456 F 541-737-6879

February 8, 2019

To whom it may concern:

I would like to extend my support for the capital campaign to raise funds for the proposed Marine Wildlife Rehabilitation/Education Center at the Oregon Coast Aquarium. This exciting project will play a critical role in enhancing the care of marine wildlife in the Pacific Northwest, which will only become more important as wildlife increasingly struggle to survive in the face of human impact on wildlife habitat and the effects of global climate change.

This proposed center will be a tremendous resource for our educational and research mission at the Carlson College of Veterinary Medicine at Oregon State University. I have had the opportunity to work with staff at the Oregon Coast Aquarium on several occasions over the past ten years, and look forward to future collaborations, which will be significantly enhanced by this proposed center. As a veterinary anesthesiologist, marine wildlife present many challenges to providing safe and effective anesthetic care. This center will provide opportunities for myself, my colleagues, our students and our residents to learn and investigate many aspects of veterinary medicine, not the least of which is veterinary anesthesia.

I am particularly excited by the training opportunities this center will provide our veterinary students. The geographic location of this center in close proximity to the Carlson College of Veterinary Medicine will be a tremendous asset that will significantly improve our ability to attract the brightest and best students from around the country. Education in wildlife medicine is constantly sought out by veterinary students, and I foresee this center as being a huge draw to future students.

Thank you for your consideration of this exciting capital campaign.

Sincerely,

Ron Mandsager, DVM
Diplomate, American College of Veterinary Anesthesia and Analgesia
Associate Professor and Section Head, Anesthesiology



Oregon State
University

The Cooperative Institute for Marine Resources Studies
Oregon State University
Hatfield Marine Science Center, 2030 SE Marine Science Dr.
Newport, Oregon 97365-5229

P 541-867-2059
F 541-867-7044

February 4, 2019

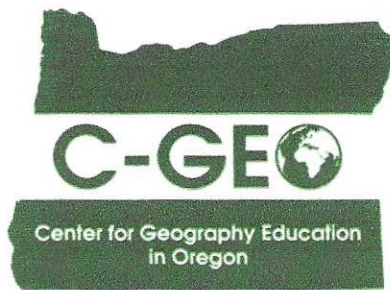
To: Funding Groups and Donors

It is my pleasure to write this letter supporting the Oregon Coast Aquarium's campaign for capital and operational priorities toward advancing its current strategic goals. The OCA is an important regional resource for marine science research, education, and outreach. I have worked with OCA staff over the last 10 years on projects involving underwater acoustic technology testing, autonomous vehicles, and diver assisted oceanographic mooring recoveries. This partnership has resulted in the successful acquisition of some of the first ever long-term recordings of ocean soundscapes in Oregon's offshore coastal waters. The ongoing collaboration between our ocean acoustics laboratory and the OCA has produced new insights for acoustic ecosystems research that we hope to share with the public through future OCA exhibits and materials.

I strongly support the Oregon Coast Aquarium's capital campaign efforts and its strategic goals toward building new and strengthening existing partnerships in the ocean sciences and education communities.

Sincerely,

Joseph Haxel
Assistant Professor, Oregon State University
Principal Investigator, NOAA-Pacific Marine Environmental Laboratory
joe.haxel@noaa.gov
(541) 867-0282



February 18, 2019

Re: Support for the Oregon Coast Aquarium

To whom it may concern:

The Center for Geography Education in Oregon (C-GEO) is pleased to show support for the Oregon Coast Aquarium's (OCAq) master plan and education programming. As C-GEO's director, I have partnered with OCAq staff on creating and conducting educational programming. In my former position as the Director of Education at the Hatfield Marine Science Center, the Aquarium was an invaluable partner in our ocean literacy efforts, as well.

My experiences working with the OCAq staff has really helped me to understand the incredible value of their work in education and conservation, which goes far beyond simply reaching their visitors. For instance, the extensive publicity garnered by the Aquarium's animal rehabilitation efforts furthers their educational reach and messaging.

As a geography education organization, C-GEO is particularly supportive of the strategic priorities identified by the Oregon Coast Aquarium. They relate to improving and expanding their educational resources to include more geographic concepts, such as sense of place and fieldwork. OCAq is already recognized as a trusted resource for ocean education and conservation throughout the state. When these goals are achieved, they will serve as a significant investment in the future of Oregon.

I look forward to continued work with and support for the Oregon Coast Aquarium.

Sincerely,

A handwritten signature in black ink, appearing to read 'Nancee Hunter', is written over a light blue circular stamp. The signature is fluid and cursive.

Nancee Hunter

Director, Center for Geography Education in Oregon

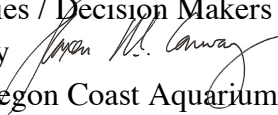
(Previously, the Director of Education at the Hatfield Marine Science Center)



Flaxen D.L. Conway, Professor and Director,
Marine Resource Management Program
College of Earth, Ocean, and Atmospheric Sciences
Oregon State University, 318 Strand Hall, Corvallis, OR 97331
T 541-737-1339 | fconway@coas.oregonstate.edu



February 13, 2019

TO: Interested Parties / Decision Makers
FR: Flaxen Conway 
RE: Support for Oregon Coast Aquarium

It is my pleasure to write a letter of support for the Oregon Coast Aquarium. I have been engaged with the OCAq for years, decades actually, and I can unequivocally share my support for their strategic goals to improve and expand operations and educational resources. This would be wonderful for the OCAq, the city of Newport, Lincoln County, all of Oregon, and the many visitors from out of the state.

I am an Extension Specialist for Oregon Sea Grant. I'm also a professor at Oregon State University where I direct the Marine Resource Management (MRM; <https://ceoas.oregonstate.edu/mrm/>) graduate program. The MRM graduate program has been around since 1974 informing today's and training tomorrow's marine resource managers and educators. The MRM graduate program is rigorous and we expect great effort from our students. One of our five areas of focus is marine education and engagement. We have over 300 alumni doing great work across the globe, many of which have in one form or another worked closely with the OCAq.

I often enlist the expertise and mentorship of Dr. Kerry Carlin-Morgan to mentor graduate students and help conduct educational research on everything from marine animal stranding to marine pollution to fisheries/seafood management education. Our students have helped advance the science on these topics. They've also helped to inform and engage the public (and stakeholders). They've designed, developed, implemented, tested and improved educational programs that have opened the minds and hearts of informal and formal learners alike. They've participated in important engagement opportunities. All in all, working with the OCAq has helped everyone to learn a lot and make a difference.

But the benefit of the amazing facilities and staff at the OCAq goes beyond just college students. In 2017 Oregon State University hosted the national competition of the National Ocean Science Bowl. We had over 200 amazingly smart and marine-oriented high school kids from across the nation come to Oregon to compete for the national title. While they were here, we worked closely with the wonderful staff at the OCAq to host a dedicated tour for participants (a tour that was rated "freaking amazing" by the majority of participants!).

The strategic priorities identified by the Oregon Coast Aquarium will contribute to society and citizens, all the way down to some very tiny but important creatures. Investment in the OCAq is also an investment in the future of Oregon. I continue to look forward to working with and supporting the Oregon Coast Aquarium and its mission as it grows into the future.



Oregon State
University

Marine Mammal Institute
Oregon State University
2030 SE Marine Science Drive
Newport, Oregon 97365

Jim Rice
P 541-867-0446
F 541-867-0128
jim.rice@oregonstate.edu

2/1/2019

Jim Burke
Director of Animal Husbandry
Oregon Coast Aquarium
2820 SE Ferry Slip Rd
Newport, OR 97365

Dear Jim,

I would like to offer my full support of the Oregon Coast Aquarium's capital campaign to implement the facility improvements outlined in your strategic planning document.

As the Marine Mammal Stranding Coordinator for the Oregon coast, I have long valued my close association with the Aquarium, which has been a consistently willing partner in providing urgent care to distressed marine animals. Since 2006, the Oregon Marine Mammal Stranding Network and the Aquarium have collaborated on 21 rehabilitation cases, including 14 sea turtles and 8 pinnipeds. In my role as the primary responder of animal strandings along the Oregon coast, I can personally attest to the clear need for increased rehabilitation resources in our region, particularly for cold-stunned sea turtles that typically require immediate diagnostic evaluation and critical care. The Aquarium's proposed Marine Wildlife Rehabilitation/Education Center would provide a much needed animal care facility on the Oregon coast, as well as a dynamic educational portal through which compelling messages about responsible stewardship of marine wildlife can be communicated to the general public.

I look forward to working with you and your staff in the years to come and wish you great success in making this plan become a reality.

Sincerely yours,

Jim Rice
Coordinator, Oregon Marine Mammal Stranding Network
Oregon State University

14-Feb-2019

To Whom It May Concern,

I recently learned that the Oregon Coast Aquarium is seeking additional support from the Oregon Governor and legislators to support the aquarium's master plan and education programming. I am very happy to submit a letter of support for this expansion of the Aquarium's educational resources.

Every year, I teach a Marine Conservation Biology class at the Oregon Institute of Marine Biology (OIMB), the University of Oregon's coastal marine laboratory. I structure the class so that it emphasizes local Oregon conservation issues. Each week we visit different 'practitioners' of marine conservation, to get different perspectives from the people who are on the ground and in the water that are working in this field. One of the units of my class is on the role of aquaria in educating the public and actually supporting conservation of marine resources. For this unit, I bring my class to the OCAq, and we do three things: 1) we get a behind the scenes tour; 2) students get 'free' time to explore and study the aquarium exhibits; and 3) we meet with Dr. Kerry Carlin-Morgan (the aquarium Director of Education) for a lecture and discussion about how zoos and aquaria contribute to conservation generally, and what specifically the OCAq is doing in this regard.

My students, who are mostly juniors and seniors and all Marine Biology Majors, absolutely love this annual trip to the OCAq. Dr. Carlin-Morgan does a tremendous job of opening their eyes to a totally different perspective on marine conservation biology which stands out from other scientists and resource managers that we meet with on other trips. Oregonians should be very proud to have this amazing aquarium facility and insightful staff on our outer coast. It brings a lot of pride to the region.

The education that the OCAq provides touches our communities on many levels. Another example is that I am on the Oregon Marine Reserves Research Dive Team. We are scientifically trained SCUBA divers that do biological surveys of the fish, invertebrates, and kelp forests in the Oregon Marine Reserves. The OCAq plays an important role in the success of that program because we use the exhibits, which are expertly curated to represent Oregon's biodiversity, to train our research divers on how to identify organisms that are rare and we might otherwise not know if we encountered them while diving in the dark, deep, cold water out on the coast. A great example is the incredible array of local rockfish species that are in the Port Orford and Halibut Flats swim-through exhibits. The aquarium lets my graduate students and I have access to dive within these exhibits to test our gear and practice our fish identification and sizing skills before we go out to do this work on the ocean. I cannot over-stress the value of this resource to local marine biologists!

One of the challenges I ask my conservation biology students to consider is how we should educate the public about difficult management issues for marine animals, especially those that are endangered or threatened. One of the first steps to well managed resources (including healthy fisheries) is just helping people understand the complexity and diversity of life in our local oceans. The OCAq does a great job of addressing this first step. I've noticed that the aquarium

walks the fine line of educating people about these complex issues in a way that transcends politics. This can be hard to do, especially in a community and region that is largely supported economically by our commercial fishing, but the OCAq does it well.

My students and I love the aquarium. I am confident that any additional investment in resources we can make in the educational mission of the OCAq will benefit Oregonians in several ways. For one, we'll all be a little more informed about the creatures in the sea around us, and that is a good thing. Second, any investment we make here will help increase the draw of the OCAq as a tourist destination on the Oregon Coast, which benefits all of our coastal economies. Finally, and perhaps most importantly from where I sit, the aquarium is helping us to train the next generation of marine scientists, resource managers, fisheries biologists, and conservation practitioners.

I hope we support the OCAq's strategic priorities as it grows and plans for serving Oregon's public well into the future.

Sincerely,



Aaron Galloway, PhD
Assistant Professor
Oregon Institute of Marine Biology
Department of Biology
University of Oregon
541-888-2581 ext. 303
agallow3@uoregon.edu

January 26, 2019



Carrie E. Lewis, President/CEO
Oregon Coast Aquarium
2820 SE Ferry Slip Rd.
Newport, Oregon 97365

PO Box 704 Siletz, Oregon 97380
elakha.alliance@gmail.com

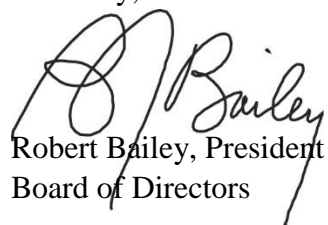
Dear Ms. Lewis:

I am pleased to offer the support of the Elakha Alliance to the Oregon Coast Aquarium for the major enhancements envisioned in the recent Strategic Plan. The Elakha Alliance is an Oregon non-profit organization dedicated to the restoration of sea otters to the Oregon coast and to the long-term conservation of this keystone species in Oregon's nearshore marine environment. We count the Oregon Coast Aquarium as a critical partner in fulfilling our mission.

We are very excited by the proposed veterinary hospital/marine wildlife rehabilitation facilities and the vital role they could play in successfully returning sea otters to Oregon's marine waters. As demonstrated by other aquaria on the West coast, the presence of such facilities is essential to rehabilitating orphaned or stranded sea otters for eventual return to the wild when possible. The presence of these facilities in Newport would be very important to the success of any translocation of animals from distant populations to Oregon. The importance of these facilities is magnified by the fact that scientists at Oregon State University's major new marine science facility at the Hatfield Marine Science Center will be only a few steps away.

We wish you success in your ambitious undertaking. If we can be of specific help, do not hesitate to ask.

Sincerely,



Robert Bailey, President
Board of Directors



The Alaska SeaLife Center generates and shares scientific knowledge to promote understanding and stewardship of Alaska's marine ecosystems.

www.alaskasealife.org

February 5, 2019

To whom it may concern,

The Alaska SeaLife Center and the Oregon Coast Aquarium have been working together since we opened our doors. In 1998, an orphaned sea otter pup, (Aialik) was rescued by our wildlife response team and ultimately placed with OCA. Since then we have placed an additional three otters (Aada, MoJoe, and Nuka) with OCA. Along the way, we have jointly advanced sea otter medicine as well as informed the public of the unique place sea otters hold in the marine ecosystem.

The Oregon Coast Aquarium's new Marine Wildlife Rehabilitation Center will greatly enhance the region's ability to respond to animals in distress and training the next generation of responders. As one of only three wildlife rehabilitation facilities in the Pacific Northwest, OCA fulfills a critical role but upgrades are needed to revitalize the program so that it is once again a state-of-the-art facility. Their current, aging warehouse is making it increasingly difficult to care for additional animals while safeguarding the Aquarium's collection and minimizing the impact of human contact during rehabilitation.

We strongly support their effort to build capacity in Oregon and strengthen the northwest network to help mitigate human impact on wildlife, and give threatened and endangered species help when they need it.

Sincerely,

Tara L. Riemer, Ph.D.
President and CEO

Carrie Goertz, M.S., D.V.M.
Director of Animal Health



Chintimini Wildlife Center
311 NW Lewisburg Ave.
Corvallis, OR 97330

02/12/2019

To Whom It May Concern,

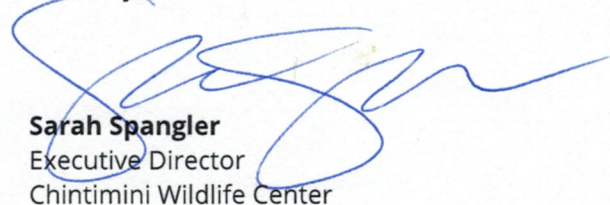
We would like to show our support for the work the Oregon Coast Aquarium is completing to expand their role as rehabilitators. Since our founding in 1989, Chintimini Wildlife Center (CWC), has provided care for injured and orphaned wildlife with the goal of returning them to their natural habitat, and fostered a connection between people and wildlife through education. In 2018, we admitted over 1,900 patients - a 10% increase from the previous year. Being one of the few permitted facilities in the state authorized to treat birds, mammals, amphibians, and reptiles we expect those numbers to grow steadily. With patient numbers trending up, we are always happy to work with other rehabilitation facilities in the area and look forward to continuing our lasting partnership with the Aquarium.

We are confident the Oregon Coast Aquarium will enjoy continued success with their rehabilitation programs as they expand. The central coast of Oregon has a growing demand for a rehabilitation facility which, due to distance, cannot be sufficiently met by the next two closest facilities (Wildlife Center of the North Coast in Astoria and CWC in Corvallis). Expansions of space and staff for the Aquarium's rehabilitation program will greatly reduce the travel time to move patients to other facilities and lead to more intake in the the area. The Aquarium has already been an active member of the wildlife rehabilitation community and works extensively to follow all the best practices and techniques. We are confident any expansion to their efforts is built upon a strong foundation designed to grow with the best of the facilities serving Oregon's wildlife.

The impact of the Oregon Coast Aquarium rehabilitation efforts will be important across the region. At the patient level, the immediate benefit of decreased transport times will ensure patients receive care promptly and with as little added stress as possible. At the facility level, the addition of a third fully-operational rehabilitation facility in the area will help distribute the patient load more evenly, improving the quality of care administered at all three of our facilities.

We are happy to work with and support the efforts of the Aquarium and look forward to seeing their development throughout this process. If you have any further questions about our facility or the nature of our partnership with the Aquarium, please contact us at the information below.

Sincerely,



Sarah Spangler
Executive Director
Chintimini Wildlife Center

Daniel Lewer, DVM

Willamette Veterinary Hospital - Owner

1562 SW 3rd St.
Corvallis, OR 97330
541.753.2223
Dan.lewer@wilvet.com

2 February 2019

To Whom It May Concern

We are issuing this letter of support for the Oregon Coast Aquarium and specifically the development of the Marine Mammal Rehabilitation Facility.

The Oregon Coast Aquarium has long been a valuable resource for the Oregon coast in the form of education, conservation, outreach and support of our valuable natural resources within our beautiful state. The general public has always utilized the Oregon Coast Aquarium as a resource to help rescue, rehabilitate and further provide capability for our endangered marine mammals and turtles that wash up on our shores. They have long provided this service without the funding and or assistance from anything except the private funds raised through their wonderful donors.

With the ever increasing human presence and involvement with our oceans and marine ecosystems our marine mammal population are more and more affect by human interaction. The Oregon Coast Aquarium helps and assists with entangled seals and sea lions, saves and rehabilitates washed up sea turtles but this is taxing on the already stretched thin employees and facilities.

The surrounding states of the west coast have examples of marine mammal rehabilitation facilities and it is our belief that our centralized Oregon Coast site could benefit and help many more animals if given the opportunity to build a rehabilitation center. The rehabilitation center with be perfectly located in the center of the Oregon coast to deploy and facilitate rescue and rehab for all animals in need up and down the coast.

This facility could also create valuable educational opportunities for all age students ranging from children just learning to appreciate Oregon coast natural environment to those veterinary students ready to learn about and pledge their lives to helping our wonderful native species. If done correctly, with strategic partnerships, this rehabilitation center could be a education base for local schools, Oregon State University and University of Oregon students.

But this facility can only be built with the help of wonderful donors who believe in the procurement of our coasts marine animals. The Oregon Coast Aquarium has the correct people and relationships to make this happen, they just need the financial fortitude.

Many thanks,

Daniel Lewer, DVM

2 February 1, 2019

To Whom It May Concern:

I am writing in support of the Oregon Coast Aquarium capital campaign. I speak as an Oregonian, parent, educator, wildlife enthusiast, and veterinarian.

The Oregon Coast Aquarium has a stellar reputation in Oregon and the Pacific Northwest. Any mention of the name invariably brings a smile and stories of visits, replete with facts learned and animal antics observed. The stories told of those visits enjoyed by so many spread, like so many ripples, over time and across generations. When little, my children memorized every path and animal habitat. Those early visits also helped to ignite curiosity in the natural world around them. Now nearly grown, they have a new appreciation for the creatures within, having accompanied me on bird rounds. This appreciation is sure to be shared with others, as those stories are told.

The creation and construction of a Marine Wildlife Rehabilitation/Education Center would benefit many animals and people alike, in our community and beyond.

These modern facilities would greatly improve the ability to observe, diagnose, treat, and care for patients. The ability to care for patients is of utmost importance to me. Currently, the facilities are aging, and are limiting in their utility. The thoughtful creation of the new Center would also lessen the stress of wildlife admitted for treatment and provide for proper quarantine facilities, to protect those in human care from contagious disease brought in by their wild cousins.

The Center would act as a center for education, from the youngest students to those in professional programs, and researchers in many fields. Veterinary students would have a unique opportunity to train at the Center. They do not have this sort of opportunity otherwise, without leaving the state. With our current situation, it is difficult to offer this sort of educational opportunity.

Our goal is outreach, care, and education at many levels, and this Center would help to do that.

Respectfully,

Julianne Vickstrom, DVM



Office of the Sheriff
Sheriff Curtis Landers
LINCOLN COUNTY ANIMAL SHELTER
510 NE Harney St.
Newport, Oregon 97365
(541) 265-6610

February 4, 2019

Oregon Coast Aquarium
Attn: James Burke
2829 SE Ferry Slip Road
Newport, OR 97365

Dear Mr. Burke,

As a long-time supporter and advocate of the work done by the Oregon Coast Aquarium, I am excited to learn of the Aquarium's future plans.

When someone discovers an animal in distress, many people's first instinct is to call animal control or an animal shelter to learn how to help. At the Lincoln County Animal Shelter, we field many of these calls, and in the case of marine wildlife and birds, we point them to the Oregon Coast Aquarium—the experts in this field.

As a member of the Oregon Coast Aquarium's Animal Welfare Committee, I have had the opportunity to interact with staff and volunteers who are all fiercely passionate about the work you do and creating the best lives for the animals in your care. Knowing your priorities and goals, it is clear that all of the projects proposed are aimed at bettering visitors' experiences, assisting staff reach their goals, and expanding your life-saving work.

I am happy to pledge my personal support of these projects, and to add my voice to the many regional partners who benefit from, and are grateful for, the Oregon Coast Aquarium.

Please do not hesitate to share my contact information with any donor who would like additional information. My direct number is 541-265-0725 and email address is lbraxling@co.lincoln.or.us.

Sincerely,

Laura Braxling, J.D., CAWA
Director

February 18, 2019

To Whom It May Concern:

I am writing this letter of support for the Oregon Coast Aquarium and its capital campaign in raising funds for the proposed Marine Wildlife Rehabilitation/Education Center in Newport Oregon. As a past board member for ten years and now serving as an Emeritus Board member and Capital Campaign Committee member, I have had the pleasure to work with this great Aquarium team in building one of the State's and Region's most exciting attractions. This new facility will advance the already exceptional work of this team that cares for wildlife at the Aquarium and those rescued on our beaches and other areas of the State and Region.

The value of the Aquarium is multi-faceted and reaches visitors, school children, researchers, on-line viewers, and others through its on-site programs, website and traveling education programs. As a board member we always saw four benefits of the Oregon Coast Aquarium to Oregon and the Region, or as I called them the 4 E's, 1) its Entertainment benefits, 2) its Educational benefits, 3) its Environmental benefits, and 4) its Economic benefits. The Aquarium provides wonderful exhibits and live programs that make it one of Oregon's most entertaining places to visit. It's been said scientists are made in middle school, and the Aquarium's onsite educational programs and traveling school program provide hands-on real experiences for students to enable their learning. With global warming and pressure on the oceans and the rivers feeding the oceans resulting from climate change, the environmental focuses of the Aquarium provide valuable information on our role in protecting the environment. Lastly, as one of the State's and Region's top destination sites, the Aquarium brings Newport and the Oregon Coast significant economic benefits from tourism and research, which will be benefitted by the capital campaign in growing the number of visitors and users of its services.

So why should we invest in the Aquarium? Marta and I believe our investment, like others making a commitment to the campaign, is an investment in Oregon and the Region's future. Including the over 400 amazing volunteers working at the Aquarium and educating its visitors, the Aquarium supports many of Oregon's, the Coastal Communities', and Public's beliefs in having a good education system, a clean environment, a strong economy, and being a destination for visitors to the State to enjoy its beauty. Investing in the 4 E's in this campaign and the new facility fulfills these beliefs. Please join me in supporting the Oregon Coast Aquarium's Capital Campaign. Thank You!

Sincerely,



Ken Thrasher

Retired CEO of Fred Meyer & Compli

Emeritus Board Member of the Oregon Coast Aquarium

February 20, 2019

2019 Oregon State Legislators
State of Oregon Capitol
900 Court Street NE
Salem OR 97301



To Oregon Senators and Representatives:

As you consider the Oregon Coast Aquarium's request for \$10 million, for construction and education to support its next 25 years of providing vital education, environmental and economic opportunities for Lincoln County, Oregon and beyond, I want you to know why I am a Charter/lifetime member committed to the Aquarium's continued success.

In 1992, when the Aquarium was a trailer on newly acquired bay-front property in Newport with architectural drawings on its walls, I purchased my charter family membership and was told my family membership would include my grandkids too:

- My oldest grandson was with us for the first day in which members were able to see Keiko, the whale.
- My three younger grandkids looked forward to camp at the Aquarium each summer, as well as sleepovers with the sharks.
- Most recently, my great-grandson chose swimming with the sharks as his Aquarium adventure.
- All of them have an appreciation for the ocean and its importance because of their time at the Aquarium.

During the years since 1992, I've been at the Aquarium to see every new exhibit, to support the Aquarium in good times and challenging times, and to do what I can to make a difference.

- The Aquarium is one of the top three charities I support because I believe its outreach and onsite educational programs keep the importance of protecting our oceans and marine life front and center in our battle to mitigate climate change.
- When I retired, I took and passed the required Marine Science course so I could volunteer twice a month; and for two years, enjoyed interacting with visitors from all over the world.
- When I sold my Embarcadero Condo in 2012, and no longer traveled to Newport regularly, I signed on to help organize and staff annual events in Portland for Aquarium members.
- Now, I am an active volunteer on the Aquarium's Capitol Campaign Steering Committee, helping to assure the desperately needed Marine Wildlife Rehabilitation/Education Center is built, and the other badly needed upgrades are achieved.

It is my hope that you will see this request from the Oregon Coast Aquarium as an opportunity to financially support the vital partnerships the Aquarium has with NOAA, OSU, Oregon Coast Community College, Newport and Lincoln County, its 7,000 members and its more than 400,000 annual visitors. With state support, you will be fostering the kind of education, research and wildlife rehabilitation that makes this Oregon star such a vital resource for all of us in Oregon, the Northwest and beyond.

Thank you for your consideration of this important funding request.

A handwritten signature in blue ink that reads "Jeanne Magmer".

Jeanne Magmer, Charter Aquarium Member
12705 SE River Rd #103A
Portland OR 97222

From: Dana Chandler [<mailto:contact@aquarium.org>]
Sent: Thursday, March 14, 2019 10:20 PM
To: contact <contact@aquarium.org>
Subject: Education program

From: Dana Chandler <dchandler@wwps.org>
Subject: Education program

Message Body:

Education Program

Today, Sally from the Oregon Coast Aquarium, came to do assemblies for our students at Prospect Point Elementary School in Walla Walla, Washington. As a principal and educator for 25 years, I have not seen an assembly, particularly at the primary level, that was as interactive, engaging, and full of information. Miss Sally kept the students mesmerized with her engagement strategies and inflatable life sized whales. The discovery tables were easy to manage and accessible to every student. This was, quite frankly, the best assembly I have ever been to for elementary students. Kudos to Miss Sally! We love her in Walla Walla!

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This e-mail was sent from a ContactForm on Aquarium.org

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This email was Malware checked by UTM 9. <http://www.sophos.com>

April 8, 2019

To whom it may concern:

Thank you to all the legislators who visited the Oregon Coast Aquarium recently. I am sorry that I was not there on the day of your visit so I could express my passion and love for the Oregon Coast Aquarium to you in person. I retired to the beautiful Oregon coast in 2006 and within months noticed an ad in the local newspaper for volunteers for the aquarium. As each year passes on, my love of volunteering for the aquarium and it's mission grows more and more. This facility is a hidden jewel in the state of Oregon. I have visited many zoos and aquariums around America and my opinion is that this is the best aquarium in the United States. Sure many other aquariums have lots of money and can put fabulous and very unique animals on display. I bought a membership to the Georgia Aquarium the week it opened its doors. We visited often and were always in awe of the exhibits there as at the National Aquarium and Sea World. But my favorite aquarium several hours away was the Tennessee Aquarium. I also had a membership there for years and took my young daughters to visit several times a year. This aquarium was where the girls learned about animals, ecology, and geography. But now I know the only thing missing was staff or volunteers who might have taught us more than the signage did. The Monterrey Aquarium was a favorite and my favorite memories are talking to volunteers who explained so much more than the signs could and answered curious questions. The Seattle Aquarium is special because I can check on the well being of the sea birds the OCA has sent to them for their exhibits and their touchpool is awesome. And the Vancouver BC Aquarium I most recently visited is just beautiful.

When I combine all the things I love about other aquariums in America, I know the Oregon Coast Aquarium has the best of everything except for a state of the art facility. No other aquarium has so many volunteers and staff so dedicated to the care of the animals on display, who work so diligently each day to insure that every visitor to the aquarium leaves with a special memory. The visitors will learn something wonderful about the animals who live off the Oregon coast, will be able to ask questions about environmental concerns and receive the latest scientific based answers to their questions, and sometimes smile when an animal shows off their skills like Jo Jo, our pelican, who always draws a laugh when she takes her bow before departing the stage.

Of course, I am writing to you today, to ask for your vote for the state of Oregon to grant funds to the Aquarium's Capital Campaign. The staff has done wonders through the past years with so little money to keep the aquarium running. I have memories of 2008 and 2009 when some days we were lucky to see 12 visitors. Now that the economy has rebounded and Americans are taking vacations again, the aquarium is busy and filled with visitors everyday. Over the past decade word has spread about the aquarium and people come with great expectations when they visit. Their expectations are met as everyone learns something new on their visit. Every day I am at the aquarium interpreting or helping in the education labs I receive comments from the visitors indicating how much they enjoyed their visit. I receive so many thanks for my service that I am embarrassed and often explain that it I who gives thanks that I have this wonderful facility so nearby that I can come every week and visit, too. The Capital Campaign will improve the facility but more importantly it will allow for the construction of a Marine Wildlife Rehabilitation Center where our fabulous staff will be able to save injured or lost animals and release them back to their wild habitat. Never has this been so important as now when global warming is causing many animals to have to adapt rapidly to changing conditions in their habitat. Please join us, the Oregon Coast Aquarium family, in making this aquarium the best it can be.

Sincerely,

Kathy Kuebbing
Newport, OR

February 19, 2019

Hello, my name is Kyle White and I am currently an Aquarist Biologist for Moody Gardens in Galveston, Texas. My current job requires me to work with hundreds of different aquatic creatures in many different ocean environments. This career path began as a youth volunteer at the Oregon Coast Aquarium (OCA). Here I was introduced to the Youth Program Coordinator Teresa Springer. I was only fourteen when I started and had little experience dealing with the public. I was very shy and this was definitely out of my comfort zone.

My first job was as a summer interpreter in various areas of the aquarium. Teresa and the staff did their best to make me feel comfortable by providing class materials and training, but it was not easy for me. Volunteering was hard, but it got easier as time went on. I could feel myself opening up and explaining things to guest more freely by the end of summer. I continued to volunteer at various outreach events. These events helped build my confidence with dealing with the public.

The second year of summer interpreting I was a lot more confident and was able to take on the role as Crew Chief. This new leadership role allowed me to help other youth volunteers by passing on my experiences. It enabled me to be more confident in dealing with the public as well as my peers.

Later that summer, I got an email asking if I wanted to try being a husbandry volunteer. I was very nervous, as I had no experience at the time and no idea what I was getting myself into, but I said yes. My first day working in the behind the scenes I was introduced to Sage Butts who was in charge of the Passages of the Deep, the largest exhibit at OCA. My first tasks were very simple. She had me help her with walkthroughs, food prep, cleaning, tank maintenance, and feedings. I will never forget that day. I always had a passion for animals and had an idea of what I wanted to do in the future, but this experience made my decision a lot easier.

As I continued to volunteer, both as a summer interpreter and volunteering in the behind the scenes, I started taking on more opportunities with the husbandry staff. This was a great opportunity for me to expand my knowledge through their guided training and support. Their efforts provided an avenue to explore other areas in aquarium husbandry which expanded my world.

Eventually, I was asked if I wanted to partake in a program to help spread awareness about ocean acidification and of course I said yes. At the time, I had no idea how much of a project it was going to be or how many people we were going to interact with. We were provided with the tools to take our ideas from conception to implementation. This included computer training, team building, brainstorming, product production, marketing and advertising. After a while we agreed on the name MOANA which stood for: Making Ocean Acidification Nationally Aware. In addition, it is the Hawaiian word for "ocean". Through MOANA we made several presentations at local schools and ended up presenting our work to

February 19, 2019

staff and volunteers at Point Defiance Zoo and the Seattle Aquarium. I am very proud to have been part of this project.

These programs helped fuel my passion for marine sciences. This led me to apply for the Oregon Coast Community College's Aquarium Science degree program during my senior year of high school. Once I graduated high school I was no longer considered a youth volunteer, but continued to volunteer and intern through their adult program.

Upon finishing my degree in aquarium science, I was immediately hired as an Aquarist Biologist at Moody Gardens. The time spent volunteering at the Oregon Coast Aquarium has shaped me into the person I am today. When I first started volunteering at Oregon Coast Aquarium, I had no idea how much Oregon Coast Aquarium, Teresa and Sage would affect my life. I gained confidence, skills and many learning opportunities that have led me to teaching the public in my current job. I am enjoying passing on my knowledge to future generations thanks to the opportunities I received from Oregon Coast Aquarium and their staff.

Sincerely

Khyle White

Dear Teresa,

Thank you so much for being our Salmon Bowl coach! We never would've made it to Nationals if it weren't for your expert question reading skills and all the work that you put into helping us succeed. We really appreciate everything you do. We look forward to another Salmon Bowl season!

Thank you!

Genevieve

Abbey

funny

Abbey THORIN

NOT Thorin

Teresa,

I want to thank you so very much for everything you have done for me. I have learned so much while at OCA and it is all thanks to you. Whether it is the science of Ocean Acidification and Climate Change during MOANA, or the impact of humans on Sea Otters, or learning professionalism and public speaking. I still remember being a scared little 8th grader coming in for my interview with you. I remember doing absolutely terrible on my interpreter 'test' during training and ~~striving~~ to be better in the future. And look where we are now! After being exposed to all the possibilities of ocean science I became so passionate about the ocean and becoming a scientist. Now I'm going off to UW fulfill this dream and it is because of what you have done. Whether you know it or not, you have played such a huge part in my life. I would not be on this path if it wasn't for you!

During graduation, our principal has a tradition where each graduate gives three tokens of thanks to the three people who had the most impact on their lives. I am giving one of these tokens to you. You are such an amazing leader, mentor, role model, and friend. I could not thank you enough. I hope you will continue to do amazing things with the people still in the program and in the future to come.

Sincerely,
Leland

Dear Teresa,
Thank you very
much for all that
you have done! Volunteer-
ing at the aquarium was extremely
fun — and I learned lots too!
Although next year I'll no longer
be an aquarium youth volunteer,
I will definitely keep in mind all
of the things I learned when I
go to college. Thank you Teresa —
Volunteering was a blast!

— Maria Alvarez

SUMMER 917



DATE: April 23, 2019
TO: Sen. Fred Girod, Co-chair, Rep. Paul Holvey, Co-chair and Committee Members
FROM: Carrie E. Lewis, President/CEO, Oregon Coast Aquarium
RE: HB5030 Aquarium Appropriation



On behalf of the Oregon Coast Aquarium, I thank you for the opportunity to testify before the Joint Ways & Means Capital Construction Subcommittee April 19th. Our board, 85 staff and 400 volunteers are so grateful for your thoughtful consideration of \$10Million appropriation to fund the Aquarium's capital campaign. Details and support letters for our campaign are available on OLIS. To summarize, the construction project priorities are: 1) Remodel the Entryway/Café, 2) Create a Children's NaturePlay area, 3) Enhance Three Core Galleries, and 4) Build a new Marine Wildlife Rehabilitation Center.

We know you have hard decisions to make, and think our capital projects align with all you care about. Below are key points that summarize why we believe our projects merit support.

The Aquarium boosts the State's economy:

- Since opening in 1992, we've attracted 15Million visitors: 35% from out of state
- Our tourism draw alone has an annual economic impact of \$100M to this county
- Visitation bumps up 5% with new exhibits - a \$5Million increase with new temporary or permanent exhibits

The Aquarium provides education:

- Our School Outreach presents to 124 remote and low-income schools in 21 counties
- We develop ocean science curriculum and provide professional development for teachers that support the State's Environmental Literacy Plan
- We created *Oceanscape* – a distance learning network providing digital content for teachers
- We partner with higher education to give interns and researchers real-world experiences, and inspire youth volunteers to consider marine science careers

The Aquarium provides marine wildlife rehabilitation:

- We are 1 of only 3 facilities in the Pacific Northwest, and the only one in Oregon, authorized by ODFW to provide care to injured, endangered marine wildlife like the turtles that wash ashore on our beaches.

This is the first time the Aquarium has come to the State for support, but we did a lot of work first. We've raised \$6Million from major foundations, charter members, and long-time philanthropists toward our \$18.2Million campaign goal. We are confident we can raise the last \$2.2Million from foundations receptive to "top off" grants, and the general public when we launch our campaign this fall.

Thank you for your service to Oregon, and your thoughtful consideration of our request.

