

HARBOR BRANCH OCEANOGRAPHIC INSTITUTE

FOUNDATION

OPERATIONS REPORT November 4, 2016

The following information provides an overview of operational activities in the Foundation offices since the April 28, 2016 Board meeting.

GENERAL & ADMINISTRATIVE

In addition to regular and ongoing operating activities:

- Oversaw personnel transition issues with Colleen Brennan's retirement. Onboarded Debbie Dutton as Colleen Brennan's replacement. Organized a Board reception to thank Colleen Brennan for her service.
- Office participated in FAU Shelter In Place Training
- Office participated in the Great Pumpkin Over the Lagoon contest with a 4 Pumpkin Specialty License Plate entry, tying in 2nd place out of 8 entries overall.
- FAU Executive Director Interviews
- FY2016 Audit
- Debbie Dutton and Colleen Brennan attended SLP Meeting in Orlando with Conlan Kennedy

BOARD OF DIRECTORS

In addition to logistical planning and pulling together background information for our June and November Board of Directors meeting we have also planned and supported meetings of the Audit, Grants, Nominating, Finance and Governance Committees:

Board Meeting	June 16, 2016
Audit Committee	October 11, 2016
Finance Committee	May 10, 2016 June 7, 2016 July 22, 2016 August 1, 2016 September 4, 2016
Governance Committee	November 4, 2016
Grants Committee	October 19, 2016
Nominating Committee	September 8, 2016

Kissman also continued her regular update meetings with the Chairman:

- June 30, 2016
- September 8, 2016
- October 18, 2016

FINANCIAL

At the recommendation of the FY16 auditors, an investment transfer request form was created. The completed form signed by the Executive Director will be forwarded to the Finance Committee Chair for approval. The fully executed form will then be forwarded to the investment manager for processing.

Colleen Brennan presented the FY17 budget to FAU on May 17 on behalf of Katha Kissman who had previously scheduled leave for that day prior to being asked to present.

Debbie Dutton implemented a process to analyze monthly financials. The analysis reviews account correctness, budgets, and assures that recurring entries are posted in a timely manner. The analysis is forwarded to the President for review. Once reviewed, the analysis is signed by the President and filed electronically for future reference during the next year's audit process.

AUDIT

In accordance with its Financial Policies and Procedures, The Harbor Branch Oceanographic Institute Foundation issues a Request for Proposal (RFP) periodically to external audit firms. The RFP is issued as the result of a governance best practice for periodic change. When applicable, the Foundation's Audit Committee creates a RFP, reviews the proposals, and selects and engages one auditing firm to conduct the annual audit.

In FY15 it was determined to issue an RFP. As a result of that process, Cross, Fernandez & Riley, LLP from Orlando was selected to be the auditor for FY16, FY17, and FY18. Prior to the start of the FY16 audit, Cross, Fernandez & Riley, LLP merged with BDO USA, LLP and while it was the same personnel from CFR, it was BDO that conducted the audit.

As a result of a new auditor, this year's process was a foundational year and entailed a greater body of work as BDO became familiar with the history, practices, protocols and financial activities of the Foundation to understand its investments, grant making, general operations and Specialty License Plate program. This year's audit included explanations of re-alignments and clarifications of specific items in the financial statements from FY15 to FY16.

The FY16 Audit was completed by BDO USA on schedule for submission to FAU by its stated deadline. Special thanks to Colleen Brennan for being a resource and enormous thanks to Debbie Dutton for her diligent, efficient, and supportive efforts to make the audit process a success.

SPECIALITY LICENSE PLATE PROGRAM

1. In the past, HBOI offered a public presentation of all SLP funded projects. Last year we found out after the fact about a decision to forgo this. This year, with Conlan Kennedy's help working with Dr. Dennis Hanisak, SLP presentations will be incorporated into the greater HBOI Ocean Science Lecture Series (OSLS). This will allow us an opportunity to again publicize the work being done with the SLP funding with a hopefully improved attendance. As previously reported:
 - Two set SLP lectures, both made up of four, 15 minutes talks. The first one will take place November 2nd at 7 p.m. The second one will be on November 30th at 7 p.m. These will all be SLP supported projects (see attached for specific projects/which dates). The researchers have agreed to these dates.
 - During OSLS 2017, there will be six SLP projects that will be featured in their own regular OSLS lecture.

- For all SLP talks, Conlan will have a table out in the lobby to answer any questions people may have before/after the talks. There will also be a plate featured next to the speaker for SLP supported work on the flyer and the program.
2. Kissman and Dutton reviewed the SLP Protect Wild Dolphins and Protect Florida Whales RFP and provided revisions to HBOI prior to finalization and distribution. Kissman and Dutton participated in the SLP Review Committee and raised concerns and offered concrete recommendations on funding distributions for each plate.
 - (5) Full Scale and (1) Pilot Scale PFW eligible projects were submitted
 - (6) Full Scale and (2) Pilot Scale PWD eligible projects were submitted

(3) PFW Awards were made:	\$ 366,886
(1) PFW Reserve Award was made:	\$ 60,000
(5) PWD Awards were made:	\$1,147,500
(1) PWD Reserve Award was made:	\$ 92,500
 3. While monitoring for legislative compliance of the SLP program continues to be conducted primarily by Brennan. Using a structured system of timely checks and balances with HBOI accounting, HBOIF continues to be in full compliance and is now up to date. As previously reported, there had been a significant delay in receiving FY16 1st Quarter information from HBOI due to FAU's transition from the Banner accounting system to the Workday accounting system. Thanks to the good work by Patrick Boles and Gregory Morgan, we are now up to date. Dutton will take over this process beginning with the 2nd Quarter of FY17.
 4. Working with the Indian River Tax Collector, Conlan Kennedy helped to structure an online plate sales opportunity for our plates at their website. On a related note, we were informed that the commercial online plate sales vendor, Michael Towner, of MyFloridaSpecialtyPlate.com sent out an email stating "we are shutting down our online service until such time we can regroup and establish a service that can handle the mass volume." We had previously reported that this service was challenging in that they charged a much larger fee for their service and there were numerous reports of individuals not receiving their plates either on a timely basis if at all.

GRANTS ADMINISTRATION

The new templates for Grant Proposals, Grants Reporting, Budget Change Requests, and No Cost Extension (NCE) have now been fully implemented. Comprehensive Grants portfolios on all active grants have been created by Debbie Dutton; these now provide all critical information on every grant at a glance.

As a reminder, the current Active Grants Portfolio includes:

New Faculty Hires Grant Support

\$5,481,051 toward support for 8 new Faculty hires (salary and start up packages over 7 years, phased)

- Dr. Laurent Cherubin, Physical Oceanographer (2013)
- Dr. Mingshun Jiang, Physical Oceanographer (2013)
- Dr. Mary Riche, Aquaculture Nutritionist (2014)
- Dr. Guojun Wang, Biosynthesis (2015)
- Dr. Mike Twardowski, Marine Technologist (2015)
- Dr. James Sullivan, Biological Oceanographer (2015)
- Dr. Matt Ajemian, Fish Biologist (2016)
- Dr. Nick Dickens, Bioinformatics (2016)

Faculty Incentive Awards Grant Support

\$1,465,000 designated on a per year basis plus an additional up to \$400,000 over the lifetime of the grant period (7 years)

Faculty Excellence/Salary Support

\$578,250 per year for 3 years; will be based on a criteria for renewal within this grant period and possible renewal of the entire grant.

Ensuring a Robust Development Strategy Grant Support

\$890,100 granted based on a projected 3 years of salary and FB support for a new Development Team for HBOI; see Grants Committee Minutes \$412,276 spent
\$447,824 unspent

NOTE: All records for historic **Love Your Lagoon** sponsors and attendees were again forwarded to FAU. In addition, we:

- o Assisted with The Moorings Gunk Hole Gang group visit to HBOI.
- o Attended the luncheon for the Indian River Estates Group Tour
- o Participated in two Development discussions with Dr. Megan Davis and Joanne Nowlin, now FAU’s Director of Development of the Northern Campuses (Jupiter and Harbor Branch)

FY14 Discretionary Funds Grant Support (Ended 12/31/15 – final report received 8/19/16)

LOBOs for Intensive, Real-Time Water Quality Sampling in the IRL \$559,295

FY15 Discretionary Funds Grant Support

- Applying New Technologies to Transform Marine Natural Products Discovery \$320,000
- Detection & Characterization of Fish Spawning Aggregations using a Novel, Persistent Presence Robotic Approach (Ended 6/30/16 – final report received 8/8/16) \$330,795

A Workshop to Assess Data Availability and Its Enhanced Use for Indian River

Lagoon Research and Management (Ended 12/31/16 – final report received 8/8/16) \$37,363.39

Operational Grant Support

- Gift Shop Operator* \$ 10,000
- HBOI Discretionary Fund \$ 10,000
- HBOI Executive Director Development Fund \$ 25,000

*HBOI took over Gift Shop operations effective FY15.

Per the Grants Committee, these operational grants will be discontinued after FY16.

The following unspent funds are being returned to HBOIF:

Description	Grants Status	Unspent to be returned	Funds Status
Operational Support	Closed	\$ 3,093.58	Received
Discretionary Research Grants			
• LOBOs Purchase and 1 st Year Maintenance	Closed	\$ 24,932.43	Delayed due to lack of personnel
• Detection & Characterization of Fish Spawning Aggregations using a Novel, Persistent Presence Robotic Approach	Closed	\$ 820.62	Delayed due to lack of personnel
Love Your Lagoon Proceeds			
• 2013 Estuarine Workshop – December 2015	Closed	\$ 12,957.91	Delayed due to lack of personnel
• Indian River Lagoon Symposium	2016 Closed	\$ 7,946.89	Received
	TOTAL	\$46,657.85	

LEGISLATIVE

Kissman plans to visit Tallahassee as part of FAU Day on February 14, 2017.

Kissman has consulted with Andy Palmer of Metz, Husband and Daughton regarding issues of possible note to HBOIF.

Reminder: Following the November election, the House and Senate will convene early December for installation of the presiding officers and swearing in of members, the legislators can then begin filing bills. They will likely to have interim committee meetings that week as well, then break for the holiday season. January and February will include multiple committee weeks and Session will start March 7 and run through May 5.

THE JOHNSON SEA LINK AT THE SMITHSONIAN INSTITUTION

The exciting idea of having one of FAU Harbor Branch's Johnson Sea Links on display at one of the museums of the Smithsonian Institution in Washington, DC has been floated since at least 2011. Such a display would be a significant opportunity for FAU and FAU Harbor Branch to showcase the past significance of the scientific innovation and research of FAU Harbor Branch and raise national and international awareness of its current and future work. Calculating the benefit to FAU and FAU Harbor Branch is intuitive and somewhat intangible. However, the Smithsonian does provide the following:

Because the Smithsonian museums are free, we cannot base our visit tallies on a number of tickets sold. Smithsonian guards use hand clickers to count everyone entering the museums through public entrances during the hours the museums are open. The counts sometimes include staff, as well as visitors who leave the museum and return. A person visiting three Smithsonian museums on any given day will be counted three times. For these reasons, we always refer to the numbers below as "visits" rather than "visitors". Visit numbers are compiled on a calendar year basis. As of August 30, 2016, visitor numbers for the three Museums mentioned above are as follows (rounded to the nearest thousand or tenth of a million (M), depending on volume):

National Air and Space Museum	5.8M
National Museum of American History	2.9M
National Museum of Natural History	5.4M

Source:
<http://newsdesk.si.edu/about/stats>

Per the Foundation Board's agreement at its April Board Meeting, a follow up meeting with Dr. Megan Davis and Patrick Boles, a formal recommendation by the HBOI Faculty Assembly, and a green light from

President John Kelly and VP Dan Flynn, the Foundation began work on an initiative to have one of the Johnson Sea Link's on display (on loan or as a donation) at the Smithsonian Institution.

Kissman then followed up with an in person meeting and phone meeting with Ryan Britton, FAU Division of Governmental Affairs to strategize the opportunity. In addition, Kissman reached out to her DC network and Dr. Valerie Paul and Dr. Mary Rice were helpful in making introductions.

The Directors of the National Museum of Air and Space and the National Museum of American History have indicated noninterest. The Director of the National Museum of Natural History, Kirk R. Johnson, was helpful in scheduling an appointment with Kara Blond, Head of Exhibits for the NMNH, on November 17 to discuss the opportunity. Board Member Amos Bussmann will accompany her on this initial meeting.

Once a definite interest by NMNH has been ascertained, Ryan Britton suggests Kissman schedule a presentation with the FAU Board of Trustees for their blessing. The Johnson Sea Links are not owned by the Foundation.

A likely tipping point may be our Foundation's interest in supporting this financially (preparation for move, moving costs, display mounting costs, possible maintenance). In addition, HBOI has much archival information already developed to accompany a display such as a self-guided "tour," e.g. a short video highlighting some of the things the subs have accomplished as well as back up other video, photographs, research papers, and quotes from users. Overall, this could be a real win-win for FAU.

Johnson Sea Link Historic Background

The Harbor Branch Oceanographic Institute was originally founded by J. Seward Johnson, Sr. (Johnson & Johnson). He worked with his friend, Edwin Link, famed the inventor of the flight simulator among other accomplishments, to establish the Institute in 1971. Under the auspices of Harbor Branch, Mr. Link invented the underwater submersible which eventually led to a lockout sub with a distinctive acrylic bubble as the forward pilot/observer compartment. Initially, this sub was originally launched and commissioned by the Smithsonian Institution and named the Johnson Sea Link after the two donors. Many of the Smithsonian Institution scientists, among them the notable Dr. Mary Rice, did much research using the Johnson Sea Link. And in 1975, a second Johnson Sea Link was built and later both subs were re-commissioned to Harbor Branch.

The scientific research dives of the Johnson Sea Links were regular features on National Geographic specials and other documentaries in the 70s through the 00s. In addition to these research dives, both Johnson Sea Links were used to examine the wreckage of the ironclad Civil War battleship, USS *Monitor* and they were also used in the effort to recover the wreckage of the Space Shuttle *Challenger* after its destruction in 1986. One of the submersibles discovered the solid rocket booster with the faulty seal that had caused the shuttle to explode.

Harbor Branch became a part of Florida Atlantic University in 2007, with the Harbor Branch Oceanographic Institute Foundation retaining the Endowment for the benefit of the Institute. In 2011 the submersibles were retired due to the costs to maintain operations of manned subs as well as with the advent of unmanned rovers that can now accomplish much of the same research activities while providing enhanced safety to humans.

HBOIF REAL ESTATE HOLDINGS

ORA Land

As previously report, the Foundation owns the land on campus where ORA is currently operating; ORA owns the business and buildings. Following up on the terms of the original lease which was set to expire June 30, 2016, Kissman and Stewart worked with ORA and they are exercising their option to renew

through June 20, 2021. This renewal includes a \$15,000 option payment included in the escalated and adjusted Base Rent of \$4,631.60/month plus applicable 6.5% sales tax for a total monthly payment of \$4,932.65 beginning July 1 with annual escalations through the life of this renewal.

There are no further updates at this time. ORA is a wonderful tenant to work with.

Lakela's Mint (former Learning Garden Montessori site)

It was previously reported that Chuck Barrowclough, Environmental Lands Coordinator, reported to Kissman that the St Lucie County Board of County Commissioners approved in consent agenda to move forward with the acquisition process of this property under the County's Greenways program at the recommendation of the St. Lucie County Land Acquisition Selection Committee. The next steps will be for the County to order competitive appraisals and following that, Barrowclough and the County's legal council will arrange to meet with Kissman and Stewart to negotiate a price.

In June, 2012, Kissman was informed Barrowclough is no longer with the County and this potential acquisition was put on hold due to lack of County funding.

Kissman and Dutton are obtaining bids for the cleanup and mowing of the property in accordance with St. Lucie County regulations and in anticipation of possible listing for sale.

No Trespassing Signs have now been posted.

Old Citrus Grove

As previously reported, the Finance Committee reviewed the Prospectus for Wetland Mitigation Bank by consultant BKI, Inc. for the Old Citrus Grove property. Action had been tabled pending follow up from FAU regarding whether they have an interest in having us continue to hold the property for the possibly of us selling it to them directly for future HBOI Campus expansion or if they would support us moving forward with plans to develop a mitigation bank with that property. The Foundation received a memo dated April 27, 2016 indicating FAU's agreement for this property to be used for this purpose.

At the June 2016 Board Meeting, following numerous staff and Committee meetings and presentations, the Finance Committee reported it declined to move forward with a proposal from Aquaco for the use of the property. It has since been reported that Aquaco is working with FAU Harbor Branch to determine if there is an opportunity to mount an initial smaller scale operation on the HBOI campus.

Previously St. Lucie County had requested an easement through our property for the purpose of further developing the trails for the Harbor Branch Preserve. The County attorney provided a TEMPORARY ACCESS EASEMENT for a term of 10 years: *This easement shall be for the sole purpose of St. Lucie County Environmental Resources Department staff (SLC ERD) or their contractors to conduct routine land management activities including, but not limited to, exotic plant and animal removal, trail head nature trail construction, habitat restoration planting, surveying and fencing of the property line, plant and animal surveys.* The easement did not include any indemnification or liability language protecting the Foundation. After review with Bill Stewart, Kissman declined to bring this request forward to the Finance Committee for the time being.

Due to a report that there were unapproved animal trappers on No Trespassing Signs have now been posted.

Peacock Road

The Peacock Road property closed on October 4, 2016 at a sales price of 514,800.

Other Land

At the present time, based on recommendation by Kissman, the Finance Committee has confirmed no intention to sell, lease, use or donate the additional parcels held by HBOIF:

- 1409-312-0002-000-0

"Salt Water Wells"
Property used to pipe salt water to ORA and Aquaculture.
Scientific exemption from property tax.
Assessed Value: \$8,900 8/16/12

- 1408-221-0002-000-8
"Behind the Bunker"
Vacant; currently not being used.
Scientific exemption from property tax.
Assessed Value: \$1,502,500 8/16/12
Appraised Value: \$ 450,000 5/10/13
- 1408-411-0003-000-8
"Channel Parcel"
Land along the channel which includes small protected inlet; this entire parcel houses the piping from the salt water wells which feed to Aquaculture. Possible HBOIF building someday?
Scientific exemption from property tax.
Assessed Value: \$572,000 2/5/14
- 1408-243-0001-000-9
"The Triangle"
Small triangle of land – wetland areas.
Scientific exemption from property tax.

2017 LOVE YOUR LAGOON

As reported to the Board on October 26 [added as of November 4, 2016]:

From: Katha Kissman
Sent: Wednesday, October 26, 2016 4:55 PM
To: HBOIF Board
Cc: HBOIF Board Admin, Debbie Dutton, Cyndi Permenter
Subject: 2017 Love Your Lagoon Update

Dear Board Members,

Deep thanks to each of your for committing to sponsor this year! We again have 100% sponsorship from our Board Members which sends a strong message to the community about our Board's personal investment in a vibrant FAU Harbor Branch. This show of support helps enormously when we are asking others to become sponsors or purchase tickets to the 2017 **Love Your Lagoon** Gala Dinner.

Here is a quick update on where we stand with regard to sponsorships. We are at \$120,000 to date; total sponsorships last year were at \$157,500. So far, so good! We would like to exceed last year's total so please let me know if you have any possible prospects I could help you approach.

2017 LOVE YOUR LAGOON SPONSORS

Mangrove Sponsors

Mr. Joseph Z. Duke, III and Mrs. Jennifer Johnson Duke
Mr. Michael O'Reilly and Mrs. Marie O'Reilly

Seagrass Sponsors

Ms. Marjorie Raines & Mr. Harold Baker

Oyster Sponsors

The Law Firm of Dean, Mead, Minton & Zwemer

Treasure Coast Newspapers

Dolphin Sponsors

Evans Properties, Inc.
Ms. Katha Kissman
Mr. John Papa and Mrs. Barbara Papa
Mr. William J. Stewart, Esq. and Mrs. Laurie Kaneb-Stewart
Mr. Michael Toner & Mrs. Carol Toner
97.1 Ocean FM and Newsradio 1490 WTTB AM/FM

Manatee Sponsors

AT&T
Ms. Marilyn C. Link
Mr. Ed Michelson and The Atlanta Consulting Group
Mr. Michael D. Minton & Mrs. Misty Minton
PNC
Wells Fargo

Seahorse Sponsors

C. Amos Bussmann and Sea Technology Magazine
Florida Power and Light
Dr. Tom Galinis and Dr. Shannon Plymale-Galinis and Aesthetic Dentistry of Palm City
Mr. Patrick Higgs & Mrs. Nancy Higgs

Dr. Megan Davis-Hodgkins and Mr. Gary Hodgkins

Dr. Joseph Ferro & Mrs. Olivia Ferro
Kmetz, Nuttall, Elwell, Graham CPAs
Mr. Shaun Plymale and Mrs. Stacey Plymale and Treasure Coast Legal
Dr. Thomas Plymale and Mrs. Sherry Plymale

Premier Estate Properties

Stuart Magazine
Jim and Jonnie Swann Corp.
Windsor

- The Media Release announcing Diane Barile as our honoree has gone out.
- The Save The Date Postcard goes out next week (by email and snail mail).
- The VIP Reception is November 9 (we anticipate about 65-70 in attendance).
- **Love Your Lagoon** Invitations will go out in late December. Deadline for single tickets will be the week of January 23. Tickets are \$200/pp

Let me know if you have any questions.

Katha

Katha Kissman | President & CEO

Harbor Branch Oceanographic Institute Foundation

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HARBOR BRANCH OCEANOGRAPHIC INSTITUTE

— FOUNDATION —

PUBLIC RELATIONS AND OUTREACH

Additional activities have included:

- May 3, 2016 – Lab Tour HBOIF Post-docs, Hunter Hines, Carlie Perricone, David Bradshaw
- May 4, 2016 – Attended Legislative Update Luncheon of the St. Lucie County Chamber of Commerce and the Economic Development Council of St. Lucie County

- May 5, 6 – Attended BoardSource Knowledge Forum, Washington, DC
- May 10 – Attended Indian River County Chamber Board Orientation
- May 13 – Attended IRL Council/National Estuary Program meeting
- May 16 – One-on-one Lunch and attended campus presentation by HBOI ED Candidate (Paul Kemp)
- May 16 – Attended Indian River County Chamber Board Meeting
- May 18 -- Attended Indian River County Chamber Networking Breakfast
- May 23 -- One-on-one Lunch and attended campus presentation by HBOI ED Candidate (Carlos del Castillo)
- May 24 – Attended Indian River County Commission Meeting
- May 25 – Lunch, Kerry Bartlett (VNA Foundation) and Lenora Ritchie (McCabe Foundation)
- June 3 -- Fort Pierce Women's Club and the St. Lucie County Chamber of Commerce present the First Friday Ladies Luncheon
- June 7 – Attended EDC Investors Luncheon Meeting
- June 8 – One-on-one Lunch and attended campus presentation by HBOI ED Candidate (Paul Kemp)
- June 8 – Attended HBOI World Ocean's Day Presentation: 'Plastic is Forever' Designer and Conservation Advocate Barbara de Vries
- June 9 – Attended Indian River County Chamber "Hurricane Preparedness" by Storm Team 5 Chief Meteorologist Steve Weagle
- June 18 – SLP Booth -- Finding Dora @ The Majestic Theatre
- June 20 -- Attended Indian River County Chamber Board Meeting
- June 22 – Lunch with Karl Steene
- June 23 – Attended "History Before Florida Tech: A Look at Human Interactions with the Natural Environment: Diane Barile" at FIT
- June 24 – Meeting with Kerry Bartlett (VNA Foundation)
- June 29 – Meeting with Bill Stewart
- July 8 -- Attended IRL Council/National Estuary Program meeting
- July 8 – Attended Indian River County Chamber State of the County Address with Bill Stewart
- July 12 – Lunch with Andy Palmer & Greg Black (Metz, Husband & Daughton) and Bill Stewart
- July 13 -- Attended Indian River County Chamber new business reception
- July 14 – Lunch with Cindy Gedeon, Vero Beach Art Museum
- July 15 – Lunch with Chini Camargo, outgoing Assistant Development Director
- July 18 -- Attended Indian River County Chamber Board Meeting
- July 19 – Attended Dr. Duane DeFresse presentation to HBOI (IRL Council/National Estuary Program)
- July 20 – Attended Indian River County Chamber Networking Breakfast
- July 21 – Attended HBOI Luncheon for Dr. Randy Blakely, Executive Director Brain Institute, Jupiter Campus
- July 21 – Attended HBOI Intern Presentation -- Nikolia Kruger, United States Coast Guard Academy
- July 27 – Attended HBOI Presentation -- "Treasure Coast Harmful Algal Bloom Situation Analysis" -- Dr. Ian D. Walsh
- July 29 – Attended HBOI's Mini International Coral Reef Symposium
- August 2 -- Attended EDC Investors Luncheon Meeting
- August 4 – Attended HBOI's Summer Intern Symposium
- August 22 – Attended Independent Sector's Webinar -- Future Politics and Nonprofits
- August 26 – Lunch with Lenora Ritchie (McCabe Foundation) and Monique Walker (AFP Indian River County)
- August 30 – Attended AFP Workshop: "Planning to Keep Your Donors"
- August 30 – Attended Indian River Chamber of Commerce Media Issues meeting
- September 1 – Meeting with Ryan Britton, FAU Division of Governmental Affairs re: Johnson Sea Link and the Smithsonian Institution

- September 9 – Lunch with Anna Brady, HBOI Community Liaison
- September 15 – Lunch with Rob Naberhouse, Michelle Naberhouse, & Linda Minton Young, Dean Mead (Viera) re: Love Your Lagoon
- September 15 – Attended HBOI's exhibit opening at Elliott Museum, Stuart
- September 16 – Meeting with Dr. Dan Flynn
- September 16 – Attended Dr. Anton Post presentation to HBOI
- September 17 – Dinner with Dr. Anton Post
- September 19 -- Attended Indian River County Chamber Board Meeting
- September 20 – Courtesy visit – Wendy & Zach Graff (Bill Penney, Marine Bank)
- September 28 -- Attended Indian River County Chamber Networking Breakfast
- September 29 – Attended AFP Workshop “Virtual Reality for Nonprofits: Emotional Storytelling Using Immersive Communication Experiences”
- September 29 – Lunch with Elizabeth Barbella (Martin Community Foundation)
- September 30 – Lunch with Cindy Gedeon, Vero Beach Art Museum
- October 4 – Attended EDC investors luncheon meeting; Dr. Dan Flynn
- October 14 – Meeting with Diane Barile re Love Your Lagoon
- October 17 -- Attended Indian River County Chamber Board Meeting
- October 21 – Lunch with Dr. Valerie Paul and Dr. Mary Rice re Johnson Sea Link at the Smithsonian Institution
- October 27 – Attended TCPalm Luminaries meet-and-greet for new editor Tammy Raits @ Harbor Community Bank
- October 28 & 29 – Facilitated ELC Board Retreat (professional courtesy)
- October 31 – Attended BoardSource workshop, Chicago, IL
- November 2 – Attended St. Lucie County Chamber – County Update Luncheon
- November 2 – Attended SLP Ocean Science Lecture Presentations Phase 1
- November 3 – Attended the Harbor Branch Heat of FAU University's inaugural Three Minute Thesis (3MT®) Competition
- November 7 – On air radio interview with Paul (Perry)Stone, The Morning Show, Radio Station WPSL, Port St. Lucie, Florida regarding ***Love Your Lagoon.***